

# **Culture of Philanthropy and Best Practices for Institutional Funding**

League of American Orchestras Conference 2025

Thursday, June 12, 2025

11:00 AM - 12:15 PM



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Cincinnati Symphony Orchestra



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Community Relations Director,  
The PNC Financial Services Group,  
Greater Cincinnati/NKY



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Director of Development,  
Marin Symphony Association



**B Crittenden** (she/her)

Director of Corporate Support,  
Pittsburgh Symphony Orchestra

# Agenda



Definitions



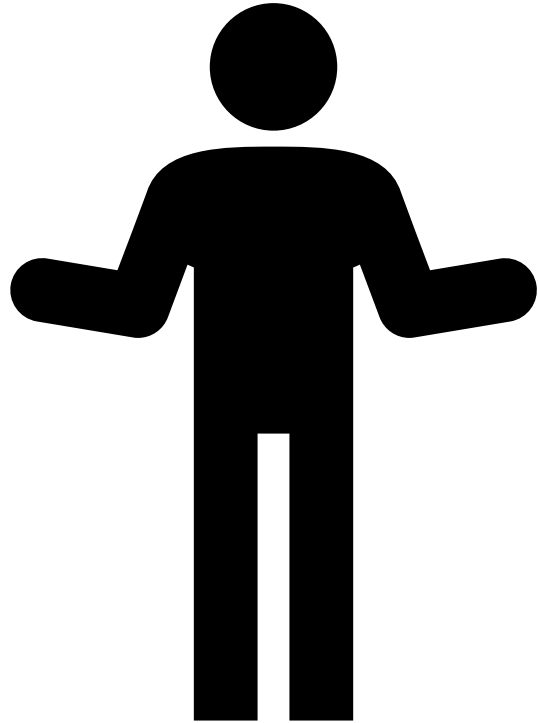
Best Practices



Case Studies



Q&A



Context Moment



# Definitions

# Definitions

- Institutional Giving
  - Grants and sponsorships
- ESG
  - A framework based on Environmental, Social, and Government factors companies use to assess sustainability and ethical impact
- Culture of Philanthropy
  - A culture in which fund development is a valued and mission-aligned component of everything the organization does
- Moves Management
  - Relationship-building process using carefully planned interactions toward greater engagement.

# Definitions

- Sponsorships
  - Corporate: people
  - Individual: people
- Foundations
  - Corporate: people
  - Family: people
- Government
  - All levels: people
- Donor Advised Funds (DAF)
  - Individuals: people



# Best Practices

Culture of Philanthropy

Timeline and Resources

Strategic Alignment



# Best Practice: 1. Culture of Philanthropy

Shared Responsibility for Development

Integration and Alignment with Mission

Focus on Fundraising as Engagement

Strong Donor Relationships

# Best Practice: 2. Timeline and Resources

## Discovery

- Use network and technology to identify and qualify prospects

## Cultivation

- Build relationship
- Learn about funder needs and objectives to find alignment

## Solicitation

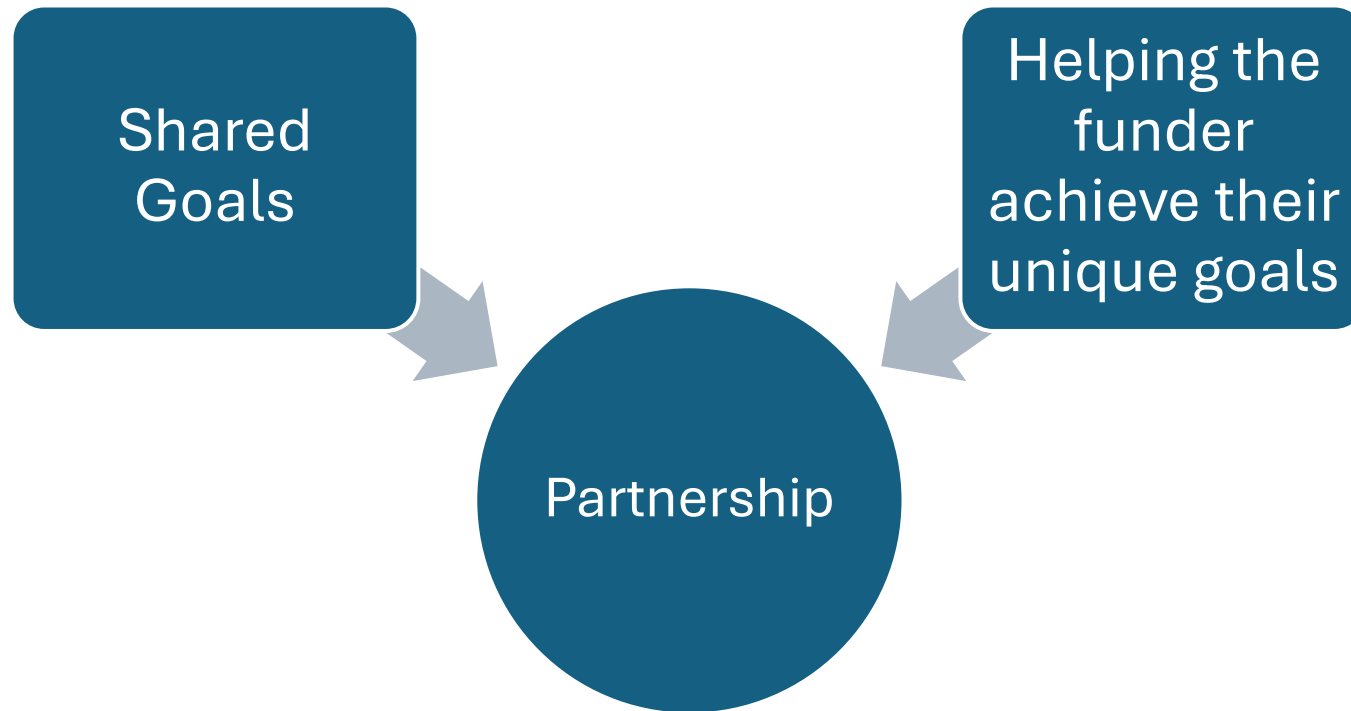
- At the mercy of funder deadlines and review processes
- Cross-departmental collaboration to build a compelling proposal
- Efficient and effective

## Stewardship

- Sponsorship activation
- Invitations to experience outputs
- Reporting, involving more deadlines and collaboration

# Best Practice:

## 3. Strategic Alignment



### Questions for Prospect:

What are your philanthropic/business goals?

Do you have an example of another partnership that has worked well?

What impact is your organization looking to have on the community and its needs?



# Case Studies

# **CASE STUDY:** ***CSO & PNC Serving the Community Together***

Sean Baker, CSO

Jessica Yankie, PNC

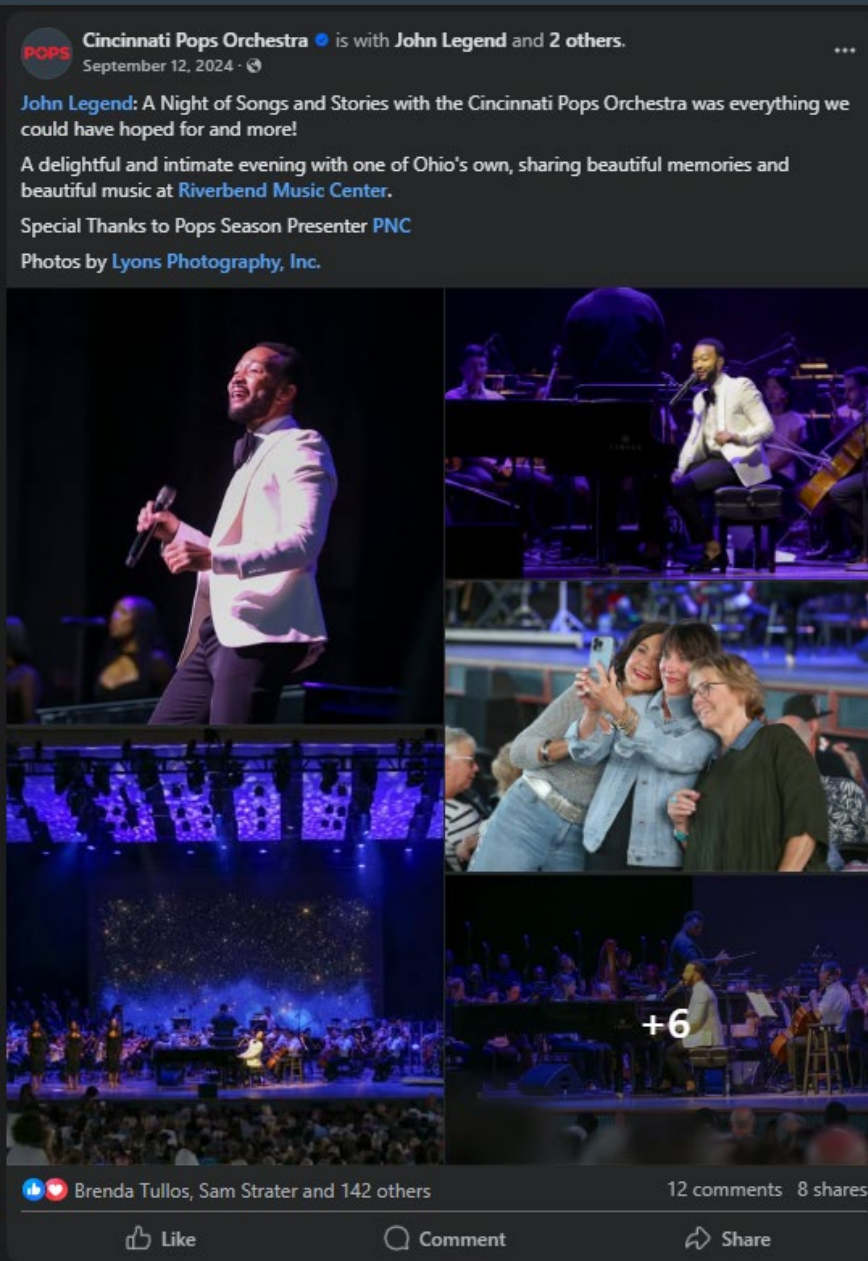


## Celebrating the magic that art brings to life.

PNC is proud to be the Pops Season Presenter and to support the Cincinnati Symphony Orchestra and Cincinnati Pops. Thank you for mastering the art of making Greater Cincinnati a more beautiful place.



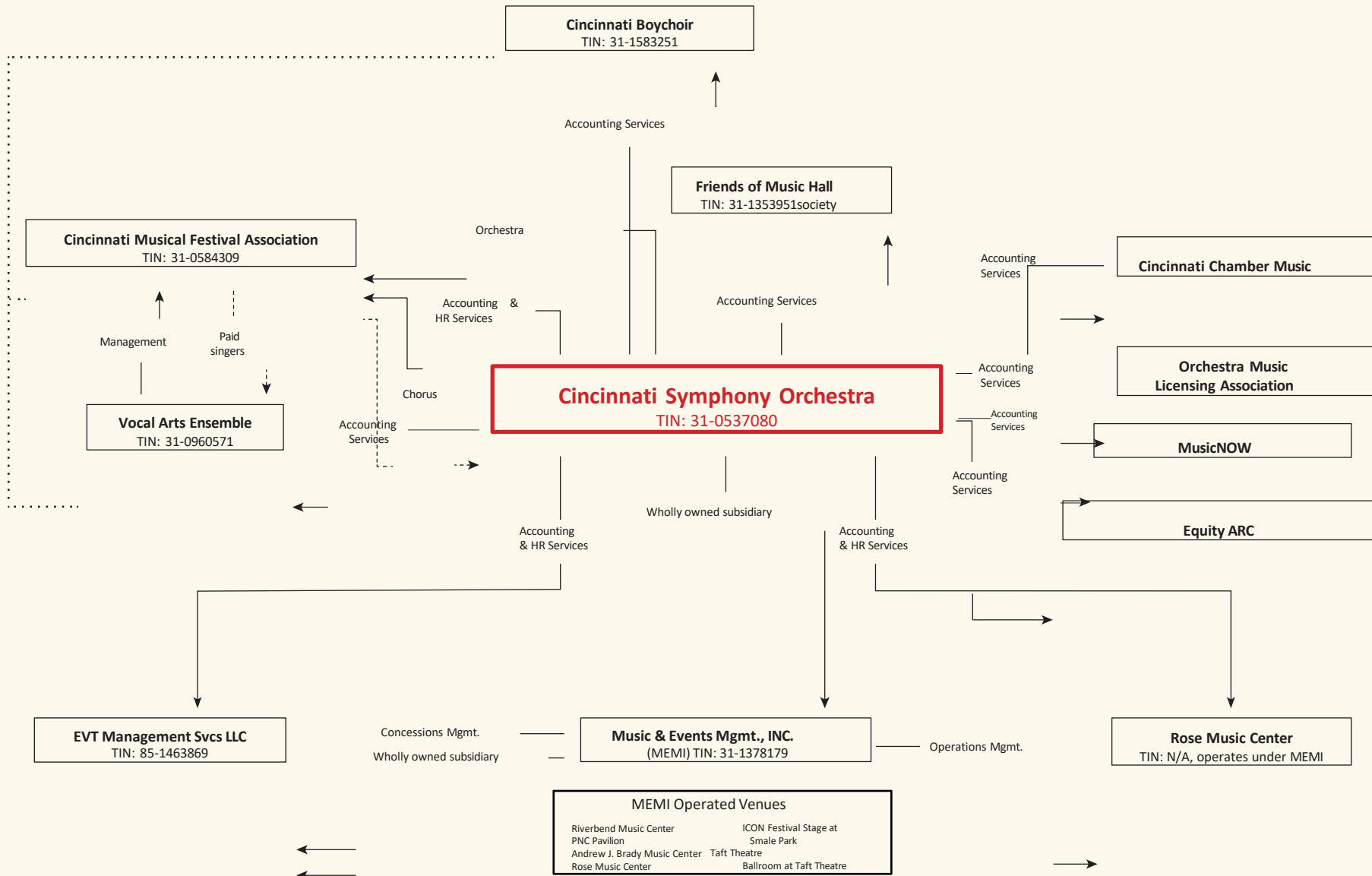
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# Mission & Vision

Mission: To seek and share inspiration

Vision: To be the most relevant orchestra in America





## Strategic Alignment

- Access
- Inclusion
- Innovation
- Inspiration

# Institutional Giving Activities

- Research
- Ideation
- Meetings (many!)
  - Hint: volunteers
- Proposals
- Stewardship
- Reports

*Repeat*

# PNC'S CULTURE OF PHILANTHROPY & EXAMPLES OF WHAT WE LOOK FOR WHEN CONSIDERING SUPPORT

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- Does the organization and what they do align with our corporate values?
- Has the organization done their homework to determine if their proposal falls within one of our defined pillars of support?
- Does the organization have a culture of collaboration?
- Is there respect for the partnership and what PNC is bringing to the table?
- Does the investment make sense for us to do?
  - Who are the beneficiaries?
  - What is the scope of impact of our support?
  - Is the project budget reasonable?
  - Is the future of the program sustainable without our support?
  - Is it ultimately something our employees, clients and shareholders will be proud of?

## WHY PNC SUPPORTS THE CINCINNATI SYMPHONY ORCHESTRA

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- ✓ Shared corporate values of enriching the vibrancy of the arts in the Cincinnati region
- ✓ Shared culture of holistic collaboration both internally and externally
- ✓ Diversity of genres, artists, programs and community outreach that is relevant and accessible to all socioeconomic demographics; meeting people where they are
- ✓ Innovative approach to enhancing programs and performances; never feels “static”
- ✓ CSO makes us feel **valued**
  - ✓ Appreciation and respect for the nearly 40-year history of support
  - ✓ Multiple touchpoints and meetings throughout the year
  - ✓ Acknowledgement from stage before every performance
  - ✓ Personalized notes at seats for our guests inviting them to enjoy private lounge and participate in artist meet & greet after the show
  - ✓ THEY LISTEN

# Thoughts

- Be Brief. Be bold. Be gone.
- Plan the work and work the plan.
- Embrace the woo.

# **CASE STUDY:**

## ***Using a Culture of Philanthropy to Serve a Corporate Objective***

B Crittenden











## Outputs/Outcomes:

- Memorable session that complemented S&T Bank's retreat goals
- Photos to company
- Showcase relationship
- Relationship-building



## Impact:

- Increased giving
- Expanded network



“

***The meeting was a huge success for our leadership team. Great way to get a group to think more creatively, outside of the box.***

”





## Main Take-Aways

- Tailor experience to entity's needs and goals
- Participation across the organization
- Start with Corporate representatives on Board
- Be prepared with call to action and invitation to re-engage



# Best Practices Demonstrated:



Culture of Philanthropy



Engaging stewardship and relationship-building



Strategic Alignment: serving a funder's need/objective

# League of American Orchestras

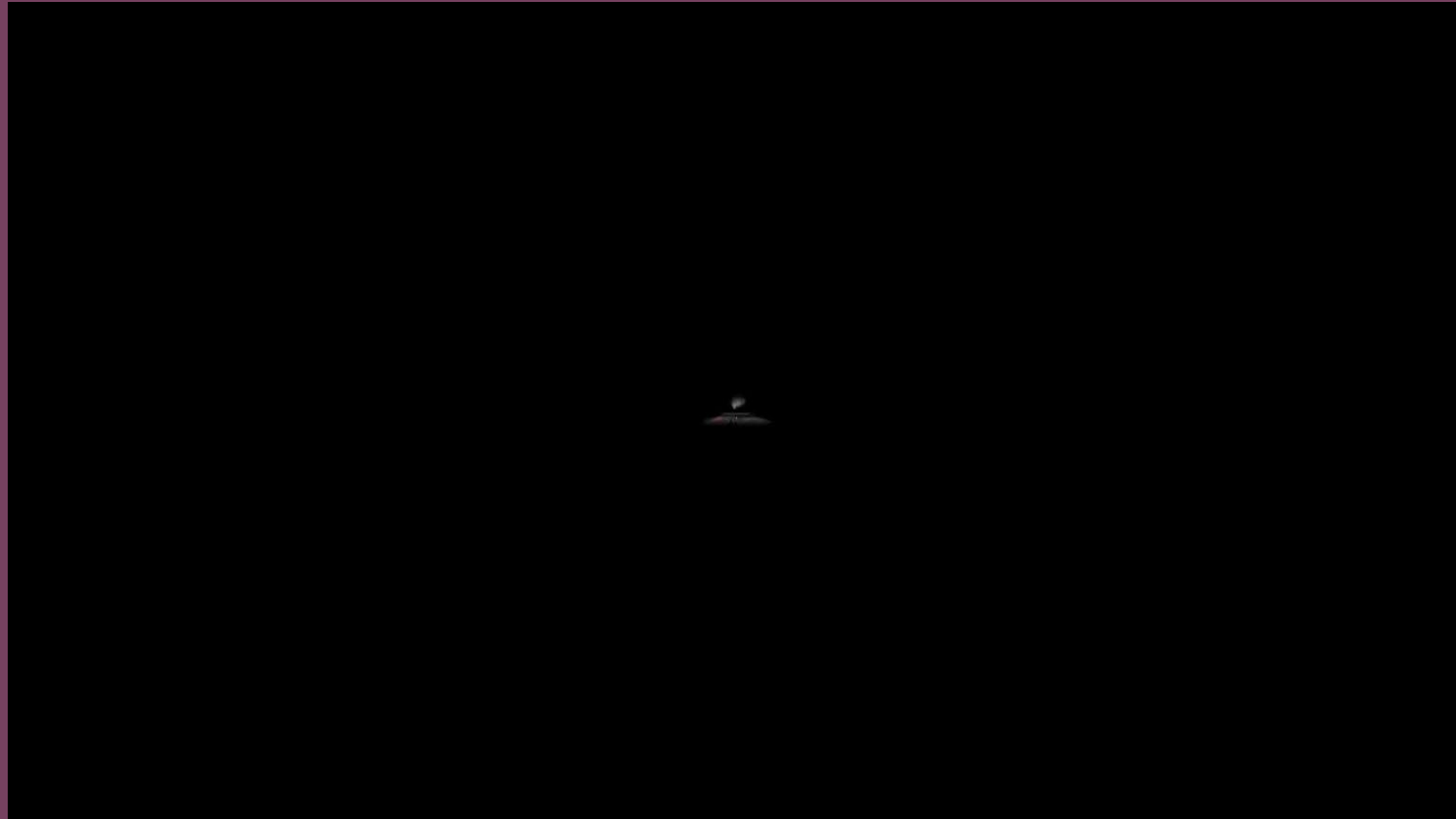
Culture of Philanthropy and Best Practices  
for Institutional Funding

Vicki Panella Bourns

June 12, 2025



Utah Division of  
**Arts & Museums**  
FOUNDED IN 1899





# Funding Goals & Purpose

- **Ensure all Utahns have an opportunity to experience arts and museums**
- **Support Utah's arts and museums community through professional development, investments, and convening**
- **Invest in Utah's cultural community by providing transparent and fair funding opportunities**

# Relationships are key

September 15, 2014



Utah Symphony Board of Directors

Just a short note to tell you thanks for the great and singular privilege of being a small part of the very successful "Mighty Five" Symphony Tour. People throughout the state (particularly rural) are still talking about it. Know how proud I am of your efforts and keep up the great work!

GARY R. HERBERT  
GOVERNOR

A handwritten signature in cursive script, appearing to read "Gary".



# Governor Cox Conducting Utah Symphony





# Best Practices

- Get to know your state arts agency grants manager
- Understand their funding guidelines
- Apply and submit reports on time
- Be realistic in your grant requests
- Serve as a model arts organization
- Advocate for funding for your state arts agency



# Strategic Actions



*Symphony* by Mabel Frazer  
State of Utah Alice Merrill Horne Art Collection

- Demonstrate how you serve your community
- Use your leverage to speak with elected officials on behalf of your state, local, municipal arts agencies
- Be Clear and Concise (3 points on the way to the garbage)
- Build your future audiences
- Support arts education in your schools



# Case Study: Marin Symphony

*How A Small Orchestra in a Residential Community  
Approaches Institutional Giving*



Nuri Kye, Director of Development  
[nuri@marinsymphony.org](mailto:nuri@marinsymphony.org)

# Marin Symphony & County at a Glance

## Marin Symphony Assoc.

- Professional orchestra established in 1952 as a community orchestra
- Budget: \$2.4m
- 3-tiered youth orchestra program
- Education & Outreach programs benefit 7,000-10K people/year
- Endowment: \$7.75m

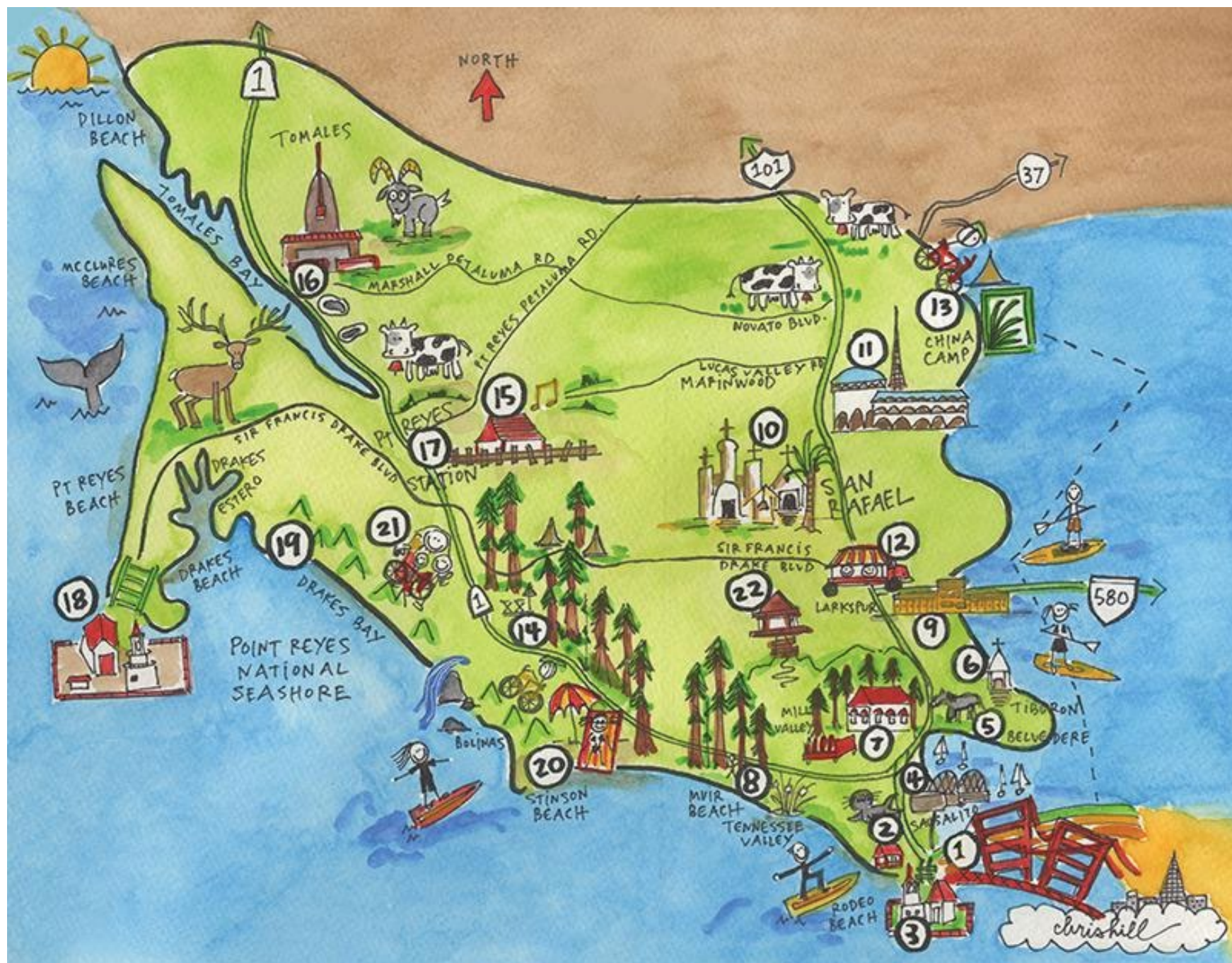
## Greater SF Bay Area

- 42 Fortune 500 Companies
- Population: 7.6 million
- Median Age: 36
- Median Income: \$123K
- Demographics: 36% White, 29% AAPI, 24% Latino, 6% Black
- # of nonprofits: 32,000

## Marin County

- 0 Fortune 500 Companies
- Population: 260,000
- Median Age: 47
- Median Income: \$143K
- Demographics: 67% White, 19% Latino, 7% AAPI, 2% Black
- # of nonprofits: 1,750





# Main Challenges

## Challenge 1

### **Sparse Staff Resources**

Without dedicated staff to manage institutional relationships, work can feel unscalable to operations - can't reduce the work that goes into research, application, feedback, and stewardship.

## Challenge 2

### **Smaller Budgets = Smaller Sponsorships/Grants**

Smaller returns further diminish organizational motivation to allocate time towards institutional fundraising.

## Challenge 3

### **Volatility**

Smaller businesses are more vulnerable to economic and environmental factors (personnel, budget)

# Why Prioritize Institutional Fundraising... and How?





# Opportunities

Why Marin Symphony Continues  
to Invest Time & Effort in  
Institutional Fundraising

- Real connection to community & mission
- Potentially easier access to decision maker(s)
- Potential access to new sub-communities, audience members, & more

# Solutions

Leveraging your organization's  
Culture of Philanthropy  
multiplies fundraising power

- Forge symbiotic, collaborative relationships with other departments that manage organizational assets & external partnerships (e.g., marketing & advertising, education, community outreach)
- Strategize with staff member(s) who owns the relationship
- Assess institutional partner's comprehensive potential





# Questions/Conversation



**Thank you!**