

Culture of Philanthropy and Best Practices for Institutional Funding

Conference 2025

SEAN BAKER: Great. Thank you so much for coming. We are excited to share some information with you. Hopefully we'll have plenty of time at the end for some questions and answers. And thank you panelists for your time and energy putting this presentation together. The idea for this discussion came about several months ago in a quarterly-ish institutional giving call that Bea organizes, where our colleagues identified the need for institutional focus sessions at conferences like this one.

We applied to the League and were pleasantly surprised when we got a yes. So we're excited again to talk with you all. We've got two larger orchestras represented on stage, and one smaller budget orchestra represented, and a couple of funders. So hopefully, you know, there will be some relevant information for everyone to take home. Our bios are on the website, so we're not going to like extemporate on that, but here's some additional information about us. I'm Sean Baker. I'm Director of Institutional Giving at the Cincinnati Symphony Orchestra. Been there for about five and a half years, leading a team of three responsible for sponsorships and government grants on an orchestral basis, turned arts administrator who has interests in sustainability, government and politics, and the human condition. I was raised by a community organizer and a culture and linguistics wonk, and now I am a pun aficionado and cat and plant dad in my spare time.

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JESSICA YANKIE: I mean, what's a presentation without technical difficulties, right? I'm Jessica Yankie. I am with PNC Bank. I've been there for 27 years. And my job, my day job, is my team and I are responsible for managing all of the for profit and nonprofit community investments in the Cincinnati market.

NURI KYE: Hi everyone. I am Nuri Kye. I am the Director of Development at the Marin Symphony. I have been with the organization for 10 years. That, you know, in the development world, I guess is a little bit of an anomaly. I started as a musician. Actually, I'm from a part of Idaho not very far from here, so it's really nice to be back in this area. Grew up playing music, the violin, and singing for most of my childhood. And when I was at university, I took a job at a performing arts organization affiliated to my university, and I was hooked from there. So I'm so pleased to be with all of you. Thank you for being with us and sharing your time.

VICKI BOURNS: Hello. I'm Vicki Bourns with the Utah Division of Arts and Museums. I live here in Salt Lake, but I am here because of my aunt, Mary Lou. She took all of us kids to the Detroit Symphony, the Detroit Institute of Arts, and she would quiz us, because she was a teacher. "So tell me who wrote Engelbert Humperdinck?" Oh, sorry, "Who wrote Hansel and Gretel?" And we'd all yell, "Engelbert Humperdink!" So that's why I'm here. I came to Utah to study dance, ended up on the administration side, and I have my dream job. I get to help arts and museums and cultural organizations from around the state. So thank you for letting me be here, and can't wait to hear what the panel is going to say.

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ELIZABETH CRITTENDON: And my name is B Crittenden. My full name is Elizabeth, but everyone calls me B. I work at the Pittsburgh Symphony Orchestra. I've been there for about four years. I work with our corporate donors and sponsors on the development team, and I really enjoy the processes and systems involved in managing that program, as well as just helping to support the symphony. I was a horn player in my past life, but new performance was not the route for me. So I kind of landed in development, as I think a lot of development people do. I'm based in Pittsburgh, and I live there with my husband and two dogs and a cat. And really excited to talk with you all today.

I'm really going to quickly going to go through our agenda. The bulk of this talk is going to be case studies from our panelists here. But before we did that, Sean and I wanted to briefly talk about just some definitions as well as best practices that are going to anchor the case studies. Before we do that, I really quickly wanted to just acknowledge the current moment. So the recent shifts in the policy environment, the executive orders, the court action on diversity, equity, inclusion, and gender identity, given the uniqueness of our organizations and our programs, the local nuances, we can't really say how the climate will continue to change, or that everything we present today will apply to each of you in the same way.

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However, there are challenges and trends that we're all facing, whether it's changing demographics, audience behaviors, pressure on external fundraising, etcetera. While these are confusing times, we hope you'll all be able to still be able to glean something from what we each bring to the table today, whether it's now or in the future. And we did, really quickly, want to just bring some levity to the moment, and each of the panelists share something that's giving us hope amidst all of the confusion. I'm going to make Sean start.

SEAN: Thank you. So from a recent chamber or Greater Cincinnati Chamber of Commerce webinar on Gen Z in the workplace, two things jumped out at me, one of which is that Gen Z is fueled by

purpose. They prize alignment between personal and corporate values, which, as a sponsorship guy, says to me that these folks are gonna — are entering the workplace. They're looking for that alignment at their employers. They are living that alignment. And then they're also bringing — and so these are some of our sponsors, but they're also coming to our workplace. I'm more of a Gen Xer, a Xennial. And one of the other things that is sort of qualities that's related to that is that Gen X values competence greater than rank. I think that those are a couple of ingredients that are going to continue to set us up for some positive change in society.

JESSICA: I would say, as a funder, what I'm finding hope in is that during these uncertain times, we're having a lot of very hard conversations with the nonprofits that we support. Some of them are facing some very harsh realities with their funding being reduced or eliminated altogether. And I think this is an opportunity for companies and individual donors to step up in ways that maybe they have not before, especially in the arts and culture sector.

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At least in Cincinnati, there are a few of us that are supportive in lots of different places, and then there are some organizations and companies that are conspicuously absent. And I think this is a good opportunity to tap into to those conspicuously absent and have them step up to the plate and help try. We can't all possibly fund the gaps of the deficits that some of these organizations are facing, but we can try.

NURI: Yeah, I'm heartened by Jessica's comments because, you know, I think there are a lot of opportunities that we have. Times like these are really times that unite people, you know, in the service of something good, and I think the arts demonstrates the best of that. You know, it helps people come together during times where they need joy, healing, community. So, you know, I think it's incumbent on all of us as administrators to continue providing those services and doing the work of communicating the value and impact to current and potential funders.

VICKI: Well, our sector is particularly resilient, and I am so grateful for all of you and all the people that are involved in arts and culture, and your resiliency, your creativity, how you support each other. And the bottom line is the arts are non partisan. We forget about that. We have support from all different peoples, from all walks of life. People value arts education. When we celebrate, what do we do? We play music, we sing, we dance. Art is embedded in our culture, and it's going to continue to be embedded no matter what's going forward. So I am optimistic. We've dealt with this before. Some of you won't remember, but yes, we dealt with culture wars before, and we will survive this one.

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ELIZABETH: And then for me, I think very much in line with what the others have said, I think when we're confronted with these major challenges, our organizations are really forced to take on some major structural innovations that we wouldn't have otherwise, and that's something that I think gives me a lot of hope and excitement for the future. And Sean is going to come up to kick us off with some definitions.

SEAN: Okay, so we're going to apply you with some definitions. I'm sure we will have forgotten some things. Apologies in advance. So when we talk about institutional giving, different shops define institutional giving differently, but usually it's some mix of corporate, government and foundation relationships. Sometimes individuals fall into the sponsorship bucket as well. B will elaborate on cultural philanthropy, and you can see what that is on screen. Moves management, I'm sure everyone is familiar with. And yeah, sponsorships. The gist here is that sponsorships, sponsors, foundations, government, and donor advised funds, are all working together in support of the communities where we find ourselves.

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Yeah, quality of life. And this — you'll see one word repeated several times on this Slide. The gist there is that all of these organizations are made up of people, and that's why we're going to be talking a lot about relationships. DAFs were included. We're just touching on DAFs a little bit because we are seeing that there are reporting trends that are heading in the direction of mirroring foundation reporting. So that's just something to be aware of. And whatever the funding sources are, the goal is the same, which is to improve the quality of life in our communities.

One distinction between institutional and individual fundraising is that where, when we're talking with individuals who are making donations to the orchestra or what have you themselves, that's a one to one conversation. We can connect with that individual's passion. On the institutional side, as you are all aware, we're talking with somebody, or maybe a group of people who are reporting to the CEO who have to run their decisions by an ESG work group. Oops, there we go. Yeah, CEO, ESG work group. So it's rarely just as easy or as sort of uncomplicated as connecting with an individual on an individual gift. B, over to you.

ELIZABETH: I'm going to try not to draw this part out too much, but like I said, we want to talk about three best practices in institutional fundraising that you're going to see popping up in the case studies that we proceed with. So first best practice, culture of philanthropy. So often in this work, we find ourselves just chasing fundraising goals kind of on our island, while the rest of the organization pursues the mission. The idea of a culture of philanthropy is that our organizations should pay more

attention to the deeper issues of building capacity, systems, and culture to support our fundraising success.

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So building such a culture can help increase giving levels and donor retention, strengthen trust, cooperation and engagement across the organization, and really align our mission and program goals more seamlessly with the revenue generation part of things. And I do want to acknowledge a report that was published called "Beyond Fundraising: What Does it Mean to Build a Culture of Philanthropy", by Cynthia Gibson. This is about 10 years old at this point. Oops, sorry.

SEAN: Yeah, I had that same issue. The mouse cursor seems to have disappeared, so our scrolling functionality is gone too.

ELIZABETH: I'm sorry, guys. Okay, well, anyway, you know, this is about 10 years old at this point, but I think the paper really nicely lays out these four pillars of a culture of philanthropy, and it also gives some nice tips for how to create and sustain a culture of philanthropy in your organization. So the first one is shared responsibility for development across the organization. And the idea of this is basically that we as fundraisers are not the only ones in our organization who are helping to develop funds. This requires that others across our organizations, while maybe they're not the solicitors, they're involved as subject matter experts, and they can really articulate a case for support.

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The second is integration and alignment with mission. So the idea of this is that our fundraising tactics are intertwined with our mission, as opposed to happening sort of off on the side of it. The third is focusing on fundraising as engagement. And the idea of this is that our donors, they're not just our donors, they are also our volunteers, our board members. Maybe at an institution that is a donor, someone we're working with is also an individual donor. So it's multifaceted. These are layered relationships. And that's also going into strong donor relationships. So it's not just us asking for money, it's building a strong relationship where there is give and take.

And I want to plug this report again. I actually found it really helpful and informative. It's also — there's an assessment tool. So there are actually KPIs associated with each sort of area of your organization, and you can assess how they're contributing to a culture of philanthropy with a checklist. So I recommend anyone check that out. Okay, our second best practice, timeline and resources. So this will look very familiar to many of you. It looks like sort of your generic donor pipeline, where we're

moving someone from discovery through the process to stewardship. But I did want to quickly note some things that are distinct in institutional fundraising.

Of course, discovery, we're using our research tools. We're using our relationships to identify and qualify prospects in the cultivation phase. Relationship mapping is really huge. So doing a cold call to a company or a foundation is not going to be potentially quite as effective as if you're utilizing a board member or an influencer in your community who can connect you with the right people. Another huge part of the cultivation phase is learning about the funder and their needs so that you can craft a proposal and a relationship that is very specific to them.

So before we're even moving into the solicitation phase, we've come to some sort of agreement about what, you know, an area to align would be. In the solicitation phase, one thing that's worth noting about institutional fundraising, there are a lot of things here that we are kind of at the mercy of institutional funder's schedules. Whether it's, you know, quarterly grant deadlines, whether it's their review processes. As you know, a grant review committee is assessing something, whether it's going through marketing analysts to review it. There are a lot of processes that we have to be aware of and note that we are not in control of, you know, solicitation answer.

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So that's kind of a complex process there. And as we're building a solicitation, there's so much collaboration that is happening internally in order to be able to craft a compelling proposal. We're working with our programming teams to understand what are the elements of the program that we should be able to talk about in this proposal. We're working with marketing to understand what are the marketing assets and metrics and impressions associated with any given sponsorship opportunity. And we're working with our teams in general just to make sure there's cohesion across the organization. Another thing to note here, and Sean and I were talking about this yesterday, I think there's a very sweet spot between spending the time to get to know a contact at an institutional donor and taking the time with them, getting to know them, crafting a compelling proposal. and the efficiency and effectiveness that is required in order to make your pitch or have that conversation.

You know, with an individual donor, we might be taking them out to dinners. We might be talking with them at donor lounges, really spending quality time with them, whereas potentially a contact at an institutional funder, we're one of many in their portfolio that they're working with and trying to craft a sponsorship in any given day. So we really have to have that elevator pitch ready with them, be able to communicate efficiently the most, you know, top three strategic priorities or elements of a given program, so that we're making that point very clear, and they're able to, you know, get the most important points of that so we can move on to a next step, instead of sort of belaboring things.

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Okay, and then finally, stewardship. There's so much opportunity here with institutional donors, whether it's a sponsorship activation, in the case of corporate, making sure that marketing assets are appropriate, or collaborating on some cross promotional opportunities. These are like great stewardship opportunities. Of course, we're making sure to invite those funders in, invite them, their staff, their clients, making sure they're really experienced, the program that they're involved in. And then, of course, reporting very similarly to solicitations. There are all sorts of deadlines, review processes, in the case of a formal report that just requires more time, attention, and project management than there might be in an individual giving scenario.

And I also just want to point out the great thing about this process is that it really reinforces a culture of philanthropy, because there's so much collaboration that's happening in this process, that the more you can kind of get this established, the more that kind of raises the opportunity to create this really positive culture. And then finally, strategic alignment as our final best practice. You know, it's this idea that in authentic relationship building, we need to be asking our potential donors, where can we align in our goals, and where can we step in to help you serve your goals? And that creates a really robust partnership, whether that's we want to both impact the community in a great way, we have this program where we're achieving that.

And then offering, in the case of a more commercial corporate sponsorship, offering an asset mix that helps them reach the audiences they're looking to try to reach through cross promotion helps give them entertainment opportunities. There are all sorts of things from this kind of more commercial sales world that can be infused into this process. And if we're working with a funder where those tangible benefits are not quite on the table, such as a foundation, so much of it is about, what are your foundations philanthropic goals, and how do they align with our organization, and how can we achieve that together?

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Just some really good questions to go to a prospect or a donor with, explicitly ask, "What are your goals?" They want to share that information. They should have that information ready to tell you. Another one, and this was actually recommended to me by a corporate contact. Just ask them, "What are recent partnerships you've had that you loved?" This will give you a really good idea of what was a memorable partnership. Not that you want to copy it necessarily, but it'll help give some insights into what that funder really values in a partnership.

And then, of course, what is the ultimate impact? This is a big question, but can kind of help guide the partnership in a big way. All right, we're done with that part. Now, let's dive into our case studies, which will hopefully be really exciting and interesting for everyone. And we're going to start with Sean and Jessica.

SEAN: Thank you, B. Because the cursor disappeared, I'm just going to drive the presentation from here and, hopefully, it'll all work out in the end. So there's a lot more information that we would love to share than we have time for, so we'll just jump right in. On screen, you can see a couple of slides of some recent activities. We've got a full page ad from PNC. We didn't write that copy. PNC wrote that copy. That's fantastic.

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And I just want to say, Jessica, thank you for your partnership, for PNC's partnership, decades long. I inherited a lot of positive or just, like, good work that had been done. And personally, I believe that, at their best, institutions can be places that promote a sense of belonging and purpose and can help people find meaning, or at least a respite from the intermittent chaos that is life. That said, here are the CSO's mission and vision. We also have these up prominently in the office so we can see them every day, and we include them in every proposal that we send out.

These came out of what I understand to be a very robust strategic planning process that concluded in 2019 when we launched our 10 year strategic plan, and we're about halfway through our 10 year strategic plan campaign. We're also in the midst of a capital campaign for River Bend Music Center. And fortunately, my institutional giving team of three plus our CEO and department head, from time to time, we get to dedicate most of our resources just to operating support day to day. And with that said, I'd like to touch on government relations just for a second, which are also in my team's wheelhouse.

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Here is — yeah, here's a semi legible org chart that we love to ply our funders with. Funders, business leaders, and community leaders. And we would like to do that for a couple of reasons. One, it illustrates the CSO's connection and economic impact in the community. You'll see CSO in the middle in the red. There are, like, a bunch of these lines. We provide back office support to a number of mission aligned nonprofits, arts organizations in the area, and that provides us an opportunity for people to tell us which one of those nonprofits they care about. Maybe it'll be the Cincinnati Boy Choir. Maybe it's the Vocal Arts Ensemble.

Second reason, it illustrates our fairly unique business model, where our wholly owned subsidiary, Music and Event Management Incorporated, owns or operates several venues in the region, and that provides those concertgoers the opportunity to tell us which venues or shows, aside from CSO and Pops, they care about. Yeah, we found that to be especially helpful with elected officials in the region outside Cincinnati, because sometimes they are people who are not super into symphonic music, but maybe they've gone to see Warren — what is it? Warren — sorry, yeah, I wanted to say Warren Buffett, but it's definitely Jimmy Buffett.

Maybe they've gone to see Jimmy Buffet every time he has performed with Warren Buffett on keyboards backstage at Riverbend Music Center. And fortunately, many of our PNC friends do enjoy symphonic music, and some of them, like Jessica, also get out into the community to talk about PNC's community support. We saw, I remember, a couple of years ago, went to a local AFP chapter presentation. I forget what the topic was, but probably something like this. Jessica was presenting. That's fantastic. We figure that when we are out in the community and we see people also out in the community, from corporations, from government, they are there for a reason, and we should get to know them.

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Okay, great. So here's some more information. So getting it out into the community and talking with people is one of the ways that we assess strategic alignment. We do some research and cultivation by attending meetings and/or holding leadership roles related to like our local AFP chapter. Greater Cincinnati Planned Giving Council. We're members of at least three chambers of commerce in the region. Greater Cincinnati, African American, Hispanic Chamber. We've got folks on philanthropy team who coordinate League development staff calls.

We try to go to election season campaign fundraisers. And whether it's a chamber or a branch of government, the city, state, city, or county, or somebody is going to be presenting on the economic state, state of the city, state of the county, state of the region. I personally love going to those because there's a bunch of information that I love nerding out with people about, like, what's the population trends, what's the areas's demographics break out to, etcetera, etcetera. And we also have scores of research and ideation meetings with basically every department internally at the CSO, including HR, if you can believe it, where we discuss their needs and how we might be able to bring some funding to the table to meet those needs.

We also try, whenever possible, to bring program staff, whether it's artistic planning staff, learning department staff, to meetings with funders, because they can connect super organically with the

programs that they are passionate about and operating every day with funders. We've done so pretty regularly in meetings with PNC, and I often find myself learning something new and different in those conversations. Separately, we have about 15 elected officials from the city, although city, county, all the way up to the state level, and about 40 sponsors in a given year.

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We meet with those folks, most of them at least once a year, ideally two or three times a year. So that's a lot of meetings, lots of meetings. And there's a lot of information sharing that happens there too. We try to share the information across the organization as much as possible. And with a five person team, again, including our department head and CEO, it is possible to attend all of these internal, external meetings and still meet with donors, but only with the help of volunteers. We bring our board members into those meetings whenever we can. Jessica, do you want to add any context on that?

JESSICA: Sure. Specific to board members being in meetings, that's actually something very common. We see that quite a bit with organizations. And if you're not currently inviting either your board chair or board members to join you in these conversations, I would encourage you to for multiple reasons. Sometimes, if the organization is new to us, if there is a board member that has a connection to PNC, one that can help gap that conversation, right? They can help with that warm introduction and fill in some blanks.

And then two, it tells us as an organization that you have an engaged, collaborative board, and that you are bringing them into your process and to help you have those conversations and make those asks. It also gives us an insight into the passion of your board members, right? If they're passionate about it, maybe we should be too. And it gives us a little bit of a different insight into getting to know you.

SEAN: That's a good segue.

JESSICA: It is a good segue. These are just a few examples of some of the things that we look for when deciding support. It's certainly not all encompassing. But some of the key things, and I think B touched on this earlier, does the organization and what they do align with our corporate values? That's incredibly important. We don't just fund organizations to fund them. We fund them because there is a shared values proposition, and then shared how they do business.

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Are they well respected and are they fiscally sound is also incredibly important. And have they done their homework? Are you coming to us with a request that is well thought out and aligns into one of the established funding pillars that we have, or are you really kind of just throwing a wet noodle at a wall and hoping that it sticks? We know when you're prepared and when you're not, and always understanding who you're talking to, and what's important to us is going to get the conversation a lot further.

And are you a collaborative organization? We don't operate in silos, and we would prefer that the people we work with not operate in silos either. You know, is there good communication across the organization? You know, there's several examples I could cite of where someone has reached out to me because I'm kind of the first person they start with. But then is my regional president also getting an email from someone else at the organization, or am I getting another email from someone else? That shows us that the right hand doesn't know what the left hand is doing. So we have a very collaborative culture at PNC, and we like to see that with the organizations that we're working with as well.

And is there respect for the partnership and what we're bringing to the table? We never, ever want to be just a check, and then see you next year when you have to report on what you did with our money. We really want to link arms and be a collaborative partner, and establish a strong, well respected kind of give and take, right? It's not just about what's in it for us, but it's also about what can we bring to the table for your organization? What dots can we help connect for you? Who can we introduce you to? Or can we collaborate and talk about, you know, the scope of impact of the work that you're asking to do?

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Maybe we're doing something similar with someone else, and we can work on ways to ensure that you're maximizing what you can do with the funds that you're asking for. And then kind of, does it make sense for us to do, right? Like not every request makes sense. But if it does, we want to know, are our dollars helping to expand the capacity of the program? Our goal is, you know, grant funds are for programmatic support, and to us, if we support that program, that means we're freeing up those dollars in your budget that you can then apply to your operating costs or to something else that isn't typically covered under other grant funds, like capital campaigns and things like that.

And then, are we the sole funder, or are we one of several? That's important too. We want to understand that, is this program dependent, is the life of this program dependent on our funding? Or is it sustainable, if we are unable to fund or should have to step back from future funding? And kind of

similar to that, does the budget make sense? I was sharing with Sean yesterday, we received — we had a proposal meeting with a festival that's coming to Cincinnati, and the ask was a seven figure ask. And as much as we'd love to, we don't print money in the back office at the bank, and that was just really unrealistic, and it was unrealistic for any company they were going to present that proposal to. And we shared that feedback. Like, this is really kind of out of touch with what's doable for most organizations.

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And that was about a year and a half ago. And about six months ago, we learned that the person, or the company that they did get to be that presenting sponsor was for far less than that seven figures. So, you know, it has to be realistic and make sense. And then why we support the CSO. And this is — it's really easy to talk about this part. It's a very easy decision for us. PNC in Cincinnati is affectionately known as the bank of the arts. We support all — support or bank all of the major arts organizations in the city. And fun fact, there are 54 markets of PNC across the market. So there's 54 of them doing this job. Forty of our 54 markets support their local symphonies.

So it's not just a Cincinnati commitment to the arts. It is part of our corporate culture and how we choose to invest in the communities where we live, work, and play. Arts are incredibly important to enriching the fabric of our communities, and not just for the arts, but economically as well. There's a huge impact there. We have a shared culture of holistic collaboration, internally and externally. Sean mentioned that they have research and ideation meetings with nearly every line of business or every department. We have a similar process when we're vetting these requests.

We're talking to our relationship managers, we're talking to line of business leaders. We're talking to the board member that is on the board of the organization. And it's truly a collaborative approach to make sure that what's being presented to us makes sense for us and is something that we can be proud of doing and having our name attached to. One of the things, the best things about the symphony that really speaks to us as an organization is they truly offer something for everyone. From Tupac and Biggie to Bach and Beethoven, they are thinking outside the box. They're innovative with the programs and performances that they're offering.

And that shows us that there's collaboration with the artistic department, right? They are thinking outside the box and innovating ways to make what they're doing accessible to everyone in the organization. You know, some folks think that arts are unapproachable, or they are not for them, but the way this CSO goes out into the community and offers community concerts in local parks, they're bringing the symphony outside of the four walls of music hall. And I think that's really special and unique, and is introducing a new generation and a new demographic of audience to the symphony that maybe wouldn't have had that experience before. And I think the last point says it all.

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They make us feel valued. There is deep acknowledgement and appreciation of our nearly 40 years of support. We meet several times a year. It's never just once that we talk a year. We get together. We want to know how things are going. And I think for any funder, share the results of concerts and programs that you're doing. How many people attended? Was it record breaking sales? We want to know that stuff. We want to celebrate those successes with you. And while benefits aren't everything, they are important. And Sean and Mary Mac take really great care of us with our tangible benefits.

We get enthusiastic acknowledgement from the stage before every Pops performance from John Morris Russell, the conductor, because he gets it, which also tells us that that culture of collaboration is truly alive and exists not just from Sean's group, but up through the CEO, Robert McGrath, and the conductors. They all know how important this partnership and this relationship is, and they go out of their way to acknowledge it every chance they get. We love the surprise and delight element of what they do.

At every show, they put a personalized note at our our seats, and inviting our guests to join them in the TAF suite, which is a donor lounge at intermission, and letting them know that there's an opportunity for an artist meet and greet after the show. We know those notes are there, but we purposely do not tell our clients that that's something that's to expect, so they're surprised and delighted to find a personalized note at their seats when they arrive. They feel special by being invited to go into a donor lounge that they normally wouldn't have access to. And generally, they're at that show because they're a huge fan of the artist, and that opportunity to meet them after the show just really builds great affinity, not just for PNC for giving them that opportunity, but with the CSO as well. Like, they are getting to do something that they wouldn't normally get to do, and that's part of what I think makes it truly unique and special.

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And most importantly, they listen to us. They understand our goals, they know what is important to us, and they deliver. It's truly a phenomenal and one of my favorite relationships that we get to work with every day.

SEAN: Thank you, Jessica. Your check is in the mail. Final couple of final thoughts here. There are a few things I try to keep in mind at the CSO. The first two are from my boss, Mary McFadden Lawson.

Be brief, be bold, be gone. Sometimes our contact has to dip out of a meeting early because they get pulled into something else. People are busy. Our time is finite.

JESSICA: I don't think any of our meetings with the symphony have ever ended on time, and that's not a bad thing. I think we do maybe 40 percent business talk, and then the rest is — we truly enjoy and love this partnership, and we view each other as friends, so we spend time catching up and we're laughing and we're sharing. And it's worth being late to the next meeting when we get to be so uplifted in a meeting.

SEAN: Thank you. And then, while it takes time to create, I have found that having a written down institutional giving plan and having a written down volunteer management for our board members plan is super helpful, period. And bear with me on this last point, to embrace the woo [?], but time, energy and money are finite resources. Love is an infinite resource, and we can learn a lot from people who are different from us, and that's one of the things that I try to communicate with my team and carry out into the world. B, over to you.

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ELIZABETH: Can I steal the clicker from you?

SEAN: Yes.

ELIZABETH: Thank you. All right, so I'm going to try to fly through this in the interest of time, but today I wanted to share an example of a type of engagement that we have done at the Pittsburgh Symphony with a corporate donor. It was really a means of stewardship, but I think it really demonstrates some of the best practices we're talking about today. I hope that — people are welcome to pick from this steal what you'd like get creative, I just hope it's useful and might inspire something. Okay, so I'm going to briefly describe the situation. We have a PSO board member, Chris McComish. He's the CEO of S&T Bank. He was a new board member at the time, and he and our CEO, Melia Tourangeau, who's in the room. Shout out, Melia, woo-woo.

[0:45:14.1]

They ended up having a conversation, and Chris expressed that he would like to do a two day retreat for his senior leadership team at Heinz Hall, which the PSO owns and operates. There would be local members, non local members, but they would be in our doors for two days. On top of this rental itself,

they wanted to do some sort of really engaging, unique experience with our musicians that was not just a performance, but something that would kind of help reinforce the retreat goals in a way that just the quartet playing for 15 minutes would not.

It was very conversational. It was participatory. And one of our musicians actually met with Chris prior to this to talk about what their retreat goals were so that they could reflect those in the performance itself. They ended up talking about how they use nonverbal communication, teamwork, and conflict management in the rehearsal and performance process. It was really great. Everyone was really engaged, as you can see from the photo. They sat very close to the four musicians in the round. They had time at the end to ask all sorts of questions, and a lot of people in the room were not familiar with orchestras or the life of a musician at all, so they were very curious to ask them about how they got into those careers, how they navigated, what's it like to be a musician. It was really great.

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We also hired a photographer for that day just to kind of capture the content, capture the moment. But it was really nice, because as a gesture, we could also offer the photos to S&T Bank themselves so they could have photos from this. They took a staged photo on our grand staircase of their team that they could use going forward. So just really quickly to kind of highlight the sort of results of this. What we provided was a very memorable, customized session for S&T Bank and their senior leadership team. I've run into people at the hall since then who have mentioned they were there, still talk about how great it was.

So hopefully it means that was their first time in the hall, and they felt inspired to come back. Of course, we were able to offer the photos. That was a nice little gift to give them. It was also an opportunity for a board member to really showcase his relationship with the PSO and his community leadership in front of his senior leadership team. I think that was something he really valued and you could tell he was really proud to be in the room that day. And then after the session itself, we had some very casual, informal relationship building.

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The musicians stuck around. I stuck around and talked to some people. So it was just a chance to get a very captive audience into our doors and talk with them. As far as larger impacts, S&T Bank did end up increasing their giving in the following year. Part of this was because we were really invested in growing the relationship, but we took the time to understand what they were looking for in a

partnership. We were able to do a performance out in their corporate footprint. So it's just part of really strong, deep stewardship.

And then, of course, the expanded network that came with having those people in our doors, and meeting the senior leadership team, and seeing them in the community and coming back, and inviting them to really advocate for the PSO going forward, I also just wanted to consider, since I know there are probably all different organization sizes in the room, there are all sorts of adaptations to this type of engagement. You know, if you can't host this sort of thing in your own doors, you go visit the company or meet them where they'd like. Maybe there's a venue they want to do this sort of thing.

Another really great engagement similar to this that we've done at the PSO, we had a different corporate retreat in our hall, but it happened to be on the same day as one of our education programs where we had school groups in, which was like gold for getting a group of people in our hall and able to sit in on the rehearsal for part, just so they could see the impact in action. The screaming kids, the clapping, the participation. It was really great. They were able to come back and talk about it after that. So if you're able to arrange some sort of crossover where they can witness the PSO or your organization in action, that's really great.

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Another thing we've done is have a company doing their retreat on site, and instead of doing — you know, involving the musicians, what they really wanted to do was utilize their senior leadership team's skills and expertise to help the PSO solve a problem. So they actually asked us to come up with a challenge that our organization was facing, and they spent an hour hearing kind of our pitch of what our challenge was. They ended up breaking into groups to create a full presentation on how they would recommend we confront this problem. And then they each presented. It was a whole competition. There was voting. They got really into it. It was exciting and awesome.

But that was another great way for them to be engaged. I think they learned a lot about the organization and what our current needs are, and hopefully, once again, that helps them advocate for the PSO and in the community now that they know a little bit more about our organization. So those are just a few different examples. This is still totally a work in progress. And I just wanted to mention, we're still trying to figure out, like, how do we position this? Is this a corporate benefit? Is it stewardship that we just kind of offer here and there? Right now it's kind of built in as an opportunity for corporate partners at a certain level and above. But of course, we'd like to be able to communicate what this is easier so that our corporate partners see what it is, understand it, and then can let us know it's something they'd like to do. So still very much a work in progress, but we're working on it.

Just wanted to highlight the main takeaways. Tailoring the experience to the company's goals was huge. Of course, a performance is always nice, it's engaging, but being able to show that it's really reinforcing something that, in this case, S&T Bank was trying to work on with their senior leadership team, that was huge. I just also wanted to acknowledge this took time and effort to arrange this kind of thing. These bespoke opportunities are great, but they're not the most efficient things to wield. So that's where, once again, the culture of philanthropy is huge. We had, of course, our CEO involved. We had hall management involved from the rental side of things. Our musicians were incredible in how they embraced this opportunity, and we really had a musician championing this and kind of leading the charge from the actual, like, professional development session side of things.

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So the more you get people in your community or in your organization understanding what their role is in this type of thing and how it impacts the organization, that's so important for getting buy in. And just another note, I think, helping with that buy in, of course, involving them in the preparations during, but also afterwards. So if S&T Bank leaders were to come back, letting those musicians in the room know that they were on site so they can go say hello again, or letting them know, "Oh, S&T Bank increased their gift. Thank you so much for your involvement in this professional development session." It shouldn't be just a one off thing. They should really understand how the time they invested into this is having impacts on the entire organization going forward.

I think starting with your board members who are corporate representatives is great. They also have a little buy in from their end, and would be excited to do this. And then finally, one thing to think about is being prepared before this with either a call to action or an invitation to return. That's something we didn't necessarily have on the day, and I always think about that. I wish I would have, like, had a whether it was something to pass out or send, you know, personal outreach afterwards. We have a captive audience. They're so excited. How do we get them to come back? So yeah, that's our case study. I'm going to kick it off to Vicki now.

VICKI: Thank you for inviting me. I'm with the Utah Division of Arts and Museums, and I wanted to just show really quickly who we are and what we do.

[VIDEO PLAYS]

SPEAKER: Utah ranks among the top 10 for art creation and cultural participation. Arts and museums are vital to Utah, supporting one in every 12 jobs and contributing nearly \$15 billion to our state's

economy. Since 1899, the Utah Division of Arts and Museums has been preserving and expanding this cultural legacy as the nation's first state arts agency. We strengthen Utah communities through funding, training, programming, networking and more. Visit artsandmuseums.utah.gov for resources and opportunities, or follow us at Utah Arts and Museums. Utah ranks among —

[VIDEO ENDS]

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VICKI: So our agency is funded mainly by the Utah State Legislature and the National Endowment for the Arts. So we have a lot of stakeholders, and each of those elected officials has a different reason for wanting or not wanting to fund arts and culture. So each state, as you know, serves its community differently. And like you, we are in this interesting environment of government funding. And like you, we have uncertainty in our future. So our agency received a note on April 3rd from the National Endowment for the Humanities, where we lost a three year \$350,000 grant a year into the process. Then we did have \$6 million of funding that we were able to give to our arts and cultural community, but it went down to \$4 million. We tried to get the \$2 million back, and unfortunately, we didn't get the full two million, we only got 600,000.

So our funding has been going up and down. We deal with it, and we are grateful for what we do have. Because unlike some states, we are not struggling for our very existence. There are a couple states out there that you're aware of who are trying — their legislators are trying to eliminate them. We're lucky. We're not there. But we also have a very fiscally responsible state. So we have been asked to look at two, four and seven percent cuts to our budget next year. So I have four budgets going on in my head as the year hasn't even started.

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But that being said, I am cautiously optimistic that we will receive some National Endowment for the Arts funding this year. Our goals as an agency is to ensure that all Utahns have an opportunity to experience arts and museums. We support Utah's arts and museums community through professional development, investments convening, and we really do this through a fair and transparent funding process. Let's hit this button. Relationships are key. You've heard from everyone on this panel about how important relationships are. This is Governor Herbert in 2019 who received the Governor's Arts Leadership Award from Americans for the Arts conducting the Utah Symphony. And there's a lovely letter from the governor to the symphony.

Next, and this is our current governor, Cox, conducting. Now, not all symphonies can get their governors and elected officials to conduct their symphonies, but it does create warm feelings and can build relationships. And using your board, as Jessica mentioned, and other people have mentioned, to build relationships with your elected officials is very helpful, because, as I mentioned, our funding comes from the legislature, and it's those elected officials who will increase our budget so that we can increase your budgets.

Best practices, and this is very similar to what you already heard. Get to know your state arts agency's grant manager, understand their funding guidelines, apply and submit reports on time. We deal with volunteer organizations and professional organizations, and I will be honest with you, it's really annoying when we're asked for extensions or get late applications because we have a small staff. Be realistic in your grant requests. We've heard this before, too, haven't we? I mean, if you ask for a certain amount of money that is like so way out of our budget range, think about how that makes you look to the funder.

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Serve as a role model. Your organizations are gems in your community. And so use your power for good and serve as a beacon of best nonprofit practices. Help to raise all boats. Help to raise your arts and cultural community with your efforts. Advocacy. When your board members can let their senator or representative know that they value government funding for the arts, that helps us all. Invite your elected officials to speak at your events. We've talked about that, that that really helps. And remember, I mean, those of us can go ask for money for my agency, but I have a vested interest. I'm getting paid for this job. They're not going to care about what I say, but they are going to care about what their neighbor says and about what their board members say.

Also, I really do encourage you to apply. Apply for National Endowment for the Arts funding. You may have noticed that there's an arts project budget that, I think it's due in July, and one of their priorities is America 250. Every single orchestra in this country can do something for America 250 this year. So I would encourage you to look at those project grants at the National Endowment for the Arts website and apply for that funding. I have one more, don't I, but it's — I have no idea why this is doing this.

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So anyways, my last side, I think, yes, is to some strategic actions. Demonstrate how you serve your community. While artistic excellence is really important to all of us in this room, if you're looking for government funding, you need to demonstrate how you're serving your community, how you impact

economic development, how you support the values of your community, how you support education, how you bring people together to create community. Use your leverage. I'm just I'm going to just keep saying this. Use your leverage to speak with elected officials on behalf of your federal, state, and local municipalities who help fund you.

And I'm going to give you some advice that David, who's in this room, just gave us. Be clear and concise when you're speaking to your elected officials. If you're handing them a piece of paper, three points only, because that thing is going to go into the garbage very quickly. Also, build your future audiences. Support arts education in your schools. That is huge. That's how I got here. That's how most of us got here. So arts education is really important. Thank you.

NURI: Thank you, Vicky. So we are running a little bit low on time. I was going to — you know, a bulk of my presentation was just going to be me complaining about — because I'd love to complain. But, you know, I think if we shave that down a little bit, we can still finish in time for some questions. So what I wanted to present to you today, you know, B and Sean and our partners here have kind of demonstrated these wonderful cohesive relationships that work for larger orchestra. You know, Sean and B are superstars, and their main purpose is, you know, to secure and steward in institutional relationships. But for some of us in smaller organizations, I'm looking at, you know, groups five and higher, maybe groups four, staffing. You know, time, resources is a real challenge.

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And of course, I am not downplaying any of the challenges that any of our larger organizations have. I mean, I think by virtue of us all being in this room, we do qualify for the suffering olympics. So that's great. So let's get right into it. I'm going to just summarize a few things, and I'll start with a map of Marin County. So Marin is a county within the Greater San Francisco Bay Area, and it's just north of San Francisco, separated by the Golden Gate Bridge. Really beautiful environment. We're not going to do a geography lesson today, but if you see the pictures, you see the beautiful redwoods, the nature, the animals. Last weekend, I saw dolphins and sea lions just 30 feet from the shore when I was out doing beach yoga.

So it is really a magnificent place to live and play, but you will not see a multi million dollar corporation almost anywhere in that environment that has a community outreach, community benefit kind of department and is able to spend the dollars supporting symphonies. So just at a glance, Marin Symphony is a professional orchestra that was started in 1952, so we have 73 years of enriching our local community. We do Masterworks and Pops concerts throughout a nine or, you know, eight month season. And as well, we have a three tiered youth orchestra program that educates about 150 students annually. Our education and outreach programs in the schools reach anywhere from seven

to 10,000 people per year, depending on capacity. I'm not going to complain about the capacity today.

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And we have an endowment just under \$8 million. So like I said, we are an organization that is within the Greater Bay Area. The demographics of the Bay Area, the kind of, you know, legend of the business success that is thriving in the Bay Area is real. And, you know, you can see the numbers here. In comparison, Marin County is starkly different. We are a very small population in a large kind of swath of land. High income, generally. A very homogeneous population, and a really high kind of number of nonprofits per capita. So I just put that in there to mention — to just kind of illustrate that, for those reasons, you know, we're not necessarily the most attractive organization or area for national or state funding.

So we have to go out and reach out to our local environment, which is a challenge given that there are not a lot of large businesses in Marin. So I'm going to lay out, you know, a few major challenges that we have as an organization. The first would be sparse staff resources, something that even a large organization, I'm sure, can relate to. So we don't have a dedicated staff member, you know, out there soliciting institutional partnerships. And the work of securing institutional partnerships is not necessarily scalable. You can't do less research, you can't do less due diligence. You know, you can't invest less time and resources in making meaningful connections with people. And you know, some of those applications will just sink so many of your hours in a month that, you know, for us, it's not necessarily realistic to be applying for national or any complicated kind of grants.

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We also want to talk about small budgets, not only small budgets of kind of the local entities that we're looking into, but also the small budgets of the nonprofit organizations in the area, including the Marin Symphony, that kind of speaks to a perceived lack of impact that an organization can make. So, you know, obviously you're starting with, you know, we're not looking for \$100,000 grants or sponsorships usually. And then challenge number three would be volatility. I think we are all aware of how COVID has impacted businesses and individuals, and when you're talking small businesses, you know, if you have one, two bad years, the following year your budget is — you know, it changes. You may not have the same kind of advertising budget that you did the year before.

So there is a little bit of volatility when it comes to us kind of continuing relationships with even long time funders. So in light of all of that, you know, why do we dedicate time to institutional fundraising when we could very well take people out to lunch and ask them for money, which we still do? So I do

want to preface that, you know, for us, prioritizing still means that we are, you know, putting more of our efforts into individual fundraising, but we do see institutional funders as an important part of the community and the bigger Marin picture. That's because, you know, these are kind of smaller business owners, individuals. I mean, I really appreciated Sean's definitions of all of these institutional funders.

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It all goes down to people. So these are people who live, work, and, you know, contribute to our community, and we feel that it's important to make a connection to their business and our impact. And because of that, you know, because these are smaller businesses, if you make the right moves, you do potentially have easier access to the decision makers, whether they be the proprietors of the business or, you know, a vice president, or something like that. And through engaging these local communities, you do tap into potential new sub communities for your organization, potentially new audience members, and more. So just very briefly, kind of talking about how we do that within an organization. I'll summarize.

You know, fundraising efforts are obviously controlled and, you know, strategized, and moved along by the Office of Development, me, one person, and another person who does marketing, development, and education. So we have to pull in a lot of other players. Of course, we are really, you know, so fortunate to have leadership. Our executive director and our board, who are very engaged in those efforts, both in individual giving and in corporate. But we also pull in a lot of knowledge and expertise and kind of insights from our marketing and advertising team as well as our outreach and education team.

So one thing, you know, that our marketing and advertising team do as they do at sales for our program books. And you know, we have sales reps who are soliciting businesses and having conversations with them kind of in the early part of the season. We use that work, you know, that helps us determine organizational capacity for a lot of these businesses so that we can come to them and tailor kind of custom made proposals that work with their budgets and their availability. So you know, that kind of cuts some of the prospecting and identification work, and we can also build off of existing relationships that the marketing department has built.

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The marketing department also knows demographics in a way that development can't really, you know, have time to understand. So it's all about educating one another. And you know, the more I know about the organization on a deep level that can speak to corporate funders, the better our

chances will be of securing a gift. We leverage our education and outreach programs really deeply. You know, the partners who are involved in bringing that to life, whether it's the County Office of Education, or other people who have kind of minor support, you know, we leverage those relationships to, you know, get potential meetings with other people that they have in their networks.

And, you know, I want to respect people's expertise. You know, nobody can speak as passionately to the work that's being done in education and outreach than my director of education and outreach, so I love bringing him to donor meetings. And you know, of course, again, development controls the efforts. We make the ask, but these are the people who are going to bring the feelings that really kind of enhance those meetings. And like my other colleagues have said, we work together to assess the institutional partner's comprehensive potential. You know, whether they're just an advertising partner for now, but maybe they want more kind of name exposure, brand exposure, and how can we work with their current relationship to, you know, expand their partnership with the symphony.

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I did have more concrete examples, but I do want to respect the time that we have today. And there's the slide that was talking about that. So if you have any questions, you know, we are all available after the session or online. So hope to continue the conversation with you.

SEAN: We have one minute or so.

ELIZABETH: So do we have any quick questions? Maybe we can just take one or two questions and our panelists will be here post session to also answer your individual questions personally.

SPEAKER: This is a question for the panel at large, but maybe specifically for Jessica. I'm wondering how institutions and fundraisers are navigating this, this wave of giving by committee, where it used to be very personal relationship based, and we're noticing it, especially in financial institutions and law firms, which are two of our biggest supporters. It used to be a conversation with the directors of the CEOs or the partners, and now they have the process of giving by committee, where we don't always have the opportunity to relay our story and our message to the greater committee. An extension of that would be shifting from a personal relationship at an institution to more of an impersonal grant process that is an application instead of a conversation, and what that looks like from the funders perspective, and why that's happening so often, and how we can curve that to make it to continue those personal relationships and make it more intimate that way.

[1:13:59.7]

JESSICA: That's a really good question. We do decision by committee. We have a team of 13 leaders. But I think that where the difference is that comes in is when my team and I, we're the ones that decide what gets to committee. So when we're meeting, we'll just use the CSO as an example, when we get the proposal, we are socializing that request with our internal teams, and we are specifically socializing that request with those teams that have direct relationships with the symphony. So we do not take the business relationship into account when making the decision, but we do talk to the relationship manager. We talk to the head of that particular line of business that manages the business side of the relationship. We're talking to our regional president. We are inviting them into these conversations.

It's quite often that the relationship manager and our regional president are in the meeting with us when we're meeting with the symphony. I think it's incumbent on us as the funders to have those people at the table, and I think it's perfectly acceptable for you to ask when you're having those meetings, that there be, you know, others from the organization at the table as well. Our goal is to always basically have the approval done before we even get to the committee, because we've done our part to socialize it and bring the folks that are actually voting on it into the conversation earlier.

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Not everyone is focused or committed to relationship based funding like we are. It's not as — it should never be such a sterile environment that you've lost your connection and that personal relationship, and if it is, then maybe that's not the right funder for you, right? But I would just — I don't know if I'm answering your question. I'm responding but I don't know if I'm answering it. I think I would just really stress, ask to have other decision makers at the table so that you are building and forming those relationships with them as well, and kind of build your network that way with those particular organizations. Did that answer? Okay.

MARLAH: So we are over time, but what I would do, first of all, I just wanted to thank our panelists. This was such a great session. Thank you. And I also just wanted to encourage each of you, if you don't have a hard stop right now and have to move on to lunch break urgently or something else, our panelists are here. If you want to exchange contact information or ask your burning question, you can do that now if you don't have to run out. Otherwise, enjoy the rest of conference. I'm Marlah, VP for Development of the League. My colleague, Audrey Elliot-Risbud, is right over there. He can talk to us. But thanks everyone, and thanks so much to our panelists. Take care.

[APPLAUSE]