

# Orchestra Fundraising in Times of Crisis

With the arrival of the pandemic, the world changed dramatically for orchestras. Theaters and concert halls were closed, concerts and events were cancelled, and orchestras were forced to cut short their seasons. With single-ticket revenue instantly drying up, and subscription money for next season slowing, the only reliable stream of revenue has become fundraising.

In April, fundraising experts Bob Swaney, founder and CEO of Robert Swaney Consulting and the League’s interim vice president for development, and James Leffler, vice president of development for the Dallas Symphony Orchestra, presented *Orchestra Fundraising in This Time of Crisis*, a free, two-part League of American Orchestras webinar that examined the critical steps for effective fundraising now. This article builds on the contents of the webinar.

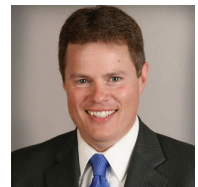
by Bob Swaney and James Leffler

When the national shutdown due to the pandemic began in March of this year and orchestras were forced to delay or cancel performances, many orchestras quickly realized that—with no box-office income—fundraising would become the most reliable means of addressing their immediate and critical cash-flow needs. For the majority of orchestras, however, the economic aftermath of the pandemic put

fundraising confidence in doubt, creating a perfect storm that limited their ability to produce music, drive revenue, and create value nationwide.

Across the country, orchestras were reacting and responding to changes that affected every part of their organizations—from cancelled performances and stunned patrons to musicians, staff, and volunteers who collectively found their organization in sudden dire straits. When the pandemic hit the United States, the two of us worked both independently and

cooperatively to help solve the economic challenges facing not only longtime clients like the Dallas Symphony Orchestra, but the orchestra field at large. Beyond working with current clients, Robert Swaney Consulting also offered pro-bono consulting for a limited period by phone and video to any arts organization that asked. We spent dozens of hours coaching and listening, and in the process, redefining our best practices for this unprecedented and challenging situation.



Robert Swaney



James Leffler

In our shared view, the most important action orchestras can take right now is to continue engaging donors through well-crafted fundraising and stewardship strategies—and to do so with confidence.

To achieve this, we start by applying our steadfast belief that during crises, patrons will remain generous and will want to experience the music, no matter how it is delivered. Organizations that confidently

address the challenges associated with an uncertain future will engender support from their patrons.

Prioritizing revenue-driven decisions is also necessary to stabilize cash flow for the short term. Imperative actions to advancing fundraising include:

- Converting ticket revenue to donations
- Accelerating high-expectation gift solicitations
- Creating inspired messaging
- Producing and distributing music
- Voicing value to the community

Efficiently putting our theories into practice has become the daily challenge. Eliminating distractions, doubts, and the natural desire to examine an uncontrollable volume of “what ifs” helps orchestras keep focus. Concentrating on areas that can either be controlled or influenced can equate to better decision-making and quick action. This approach leads to an immediate mobilization of high-leverage, high-return fundraising activities, resulting in increased and immediate philanthropic support.

Another part of a successful fundraising formula focuses around philanthropic messaging. RSC clients intentionally

do not employ needs-based messaging, widely used by other non-profits during a crisis, in favor of enhanced value-based messaging. Any disappointing news should be offset by aspirational and inspirational information whenever possible.

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The frequency of messaging to patrons dramatically increases, and stewardship and relationship-preservation mature as organization-wide priorities.

### ADDRESSING IMMEDIATE PRIORITIES

In reviewing the key gift categories (Board, Major Individual Donors, Broad-Base Individual Donors, Sponsors, and other Institutional Donors), we reconfigured our approach with positive urgency. As PPP became a familiar acronym for the federal Paycheck Protection Program, RSC adapted the initials to mean “Patron

## Learn More

In April, the League of American Orchestras presented *Orchestra Fundraising in This Time of Crisis*, a free, two-part webinar by Bob Swaney, founder and CEO of Robert Swaney Consulting and the League’s interim vice president for development, and James Leffler, vice president of development for the Dallas Symphony Orchestra. The webinar was intended for orchestra executive directors, youth orchestra directors, trustees, development and fundraising staff, and anyone seeking to learn more about fundraising throughout the pandemic. The *Fundraising in This Time of Crisis* webinar took place on April 15, followed by *Maintaining Donor Relationships* on April 22. Watch the webinars free of charge at [americanorchestras.org/fundraisingtimeofcrisis](http://americanorchestras.org/fundraisingtimeofcrisis) (please note that you will need to register first). For more information, contact Bob Swaney at (317) 300-4443 x71 or [rsc@rscfundraising.com](mailto:rsc@rscfundraising.com), and James Leffler at (214) 871-4515.

The webinar was made possible by generous grants from American Express, the Howard Gilman Foundation, and the National Endowment for the Arts, as well as supported, in part, by public funds from the New York City Department of Cultural Affairs in partnership with the City Council.

### What We Do Know

- Patrons remain generous
- There is a growing hunger for access to arts and culture
- Fundraising is the main (if not only) source of revenue
- Confidence matters

### Our Philosophy for Advancing Fundraising

- Keep the money – and keep it in **this** fiscal year
- Thoughtful yet urgent asking must continue
- Messaging should be upbeat and inspired
- Continue to produce and distribute art in whatever ways you can
- Add value, and voice that value frequently

### Six Actions Your Orchestra Can Take Immediately to Raise More Money

1. Create and post content online
2. Constantly promote
3. Double-down on stewardship
4. Ask for support
5. Engage your musicians and board
6. Consider engaging a guide

### Message and Frequency Matter

- Stay at 30,000 feet
- Focus on activities and value
- Reinforce each disappointment with at least two positives
- Become peddlers of hope
- Over-communicate, and make it interactive when possible

### Preparing Three Fundraising Plans

- Focus on generosity, it is a constant
- Message on value
- Know your numbers, timelines, and activities for each operational plan
- High-leverage / high-return **first** to build momentum

### Fundraising Plan #1 – Holiday 2020 Launch

- Front-load leadership, sponsorship and heroic asking into FYQ1 and FYQ2
- Curb high-cost / low-yield asking until post-election
- Increase communication activity ‘minus eight weeks’ before launch
- Produce and share music online, promote confidence and value

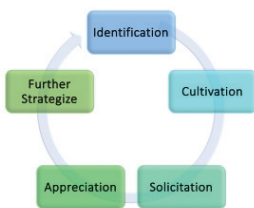
### Fundraising Plan #2 – Spring / Summer 2021 Launch

- Front-load leadership, sponsorship, multi-year and heroic asking into FYQ1 and FYQ2
- Curb high-cost / low-yield asking until concerts resume
- Increase communication activity ‘minus eight weeks’ before launch
- Produce and share music online, promote confidence and value

### Fundraising Plan #3 – Fall 2021 Launch

- Plan and schedule as traditional
- Increase communication activity over the summer to prepare
- Front-load leadership and heroic asking into FYQ1 and FYQ2
- Be ready for mid-fiscal year changes

### The Donor Cycle



### Critical to the Cycle – Especially Now

- Consistent attention to each step
- Outward focus – Full engagement
- Communication Plan
- Mutually-beneficial relationship
- Emphasis on Cultivation and Stewardship
- Customizing the gift requests

Preservation Program,” giving a common focal point for our clients to make revenue-based decisions. Our tactics were—and continue to be—aimed at effectively engaging patrons throughout the crisis and into recovery.

**Board Giving:** A longstanding goal of board giving is to achieve 100% participation, and securing this goal became a top priority. Additionally, to increase giving from this group, a core tactic became creating a collective challenge grant to inspire other donors. We discouraged an over-reliance on board giving to solve the entirety of cash issues but did (and do) rely on the board’s leadership-level giving to be the pacesetter for all other giving. This group also sets the tone by converting their ticket money and, in some cases, year-end gala and special-event monies, into contributed support.

**Major Individual Donors:** Approaching this group has required a deeper, donor-by-donor review depending on personal circumstances and their relationship with the orchestra. Donors in this category were approached to accelerate the timing of their renewal gift, make an increased gift, make a second gift, convert ticket and/or event support into contributions, or all or none of the above. A subset of this group, often the top ten or twenty donors, were also considered for a “heroic gift” to temporarily and dramatically improve cash flow while concerts and events are on hold.

**Broad-Base Individual Donors:** Although the total cash represented by this group is comparatively small, investing in their retention as part of our PPP approach remained a priority. We emphasized continuing to ask via distance channels, such as direct mail, telefunding, email, and social media, and aligning asks with other social media content and new offerings for the orchestra.

**Sponsorships and Institutional Giving:** Similar to the Major Individuals category, Institutional Giving required a case-by-

case review. The strategy for this group was geared to keep support in the current fiscal year rather than pushing into the next year. Realigning sponsorship recognition with new online content became an appealing option and proved to be an effective strategy. For gifts designated for

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education and community programs that were suspended, grantors were approached individually to gauge flexibility and adaptability with the possibility of reducing or removing restrictions, most often resulting in positive outcomes for the orchestra.

### LOOKING TO THE FUTURE

After we addressed the immediate cash-flow opportunities, we began to develop a path for 2020-21 fundraising. Given that many uncertainties related to performances remain, we project fundraising will be the dominant, if not sole, revenue stream for many orchestras over the next twelve to eighteen months.

With a new fiscal year approaching, we are focusing on expanding our Patron Preservation Program methodology—along with philanthropy’s primary tools to cultivate, solicit, and steward donors at all levels. This approach will address the key gift categories and tactics to maximize donor retention and philanthropic support while live performances find their new footing.

**Three Operational Plans:** We first suggest that our orchestra partners develop three operational plans for 2020-21, including supplemental fundraising and tactical outlines for marketing. Each plan, similar to but independent from the others, would pivot on a different date for music returning to the stage, thereby providing a pre-planned approach to a still rapidly changing environment. As examples, we chose “Holiday,” “Spring/Summer 2021,” and “Fall 2021” launch possibilities.

Deepening relationship-based fundraising skills is crucial in helping to provide some financial stability during this challenging time. RSC relies on a time-tested “Donor Cycle” model of identification, cultivation, solicitation, and appreciation/stewardship. The focus is on attracting donors, keeping donors invested, and increasing donor commitments as the relationship between your orchestra and the donor matures.

**What fundraising practices should be emphasized in the coming months?**

Although baseline fundraising activities will increase, fresh approaches must be considered. Donors, sponsors, and other funders are all dealing with their own recovery situations, so fundraising tactics

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must balance urgency with flexibility, expectations with reality, and tradition with innovation to accommodate the changing philanthropic landscape. Donors will continue to give—not so much for what you can do for them, but because they have a deep affection and affinity for your orchestra. Supporting this idea, asking for gifts should become personal at more levels, and should always be value-based. Increasing communications to all patrons and continuing to produce and distribute your music in whatever ways feasible are paramount. Showing appreciation to donors at every opportunity will also leave both immediate and long-term positive impressions that support the PPP model. In short, bring your donors along on the journey with your orchestra. Be flexible to accommodate their needs, make them part of the conversation, and treat them each as indispensable partners in leading through the recovery—not just as donors, but as trusted friends.

How closely will symphony orchestras return to their former selves after the

health and economic crisis subsides? We simply don’t know. What we do know, as evidenced by our work with the Dallas Symphony Orchestra and RSC clients of all sizes and budgets, is that even if the industry changes forever, there are likely silver linings that are not yet fully defined.

In the meantime, orchestras will find ways to do what they do best: provide high standards of performances and community services that are meaningful to their communities. And if aptly involved, donors will continue to be there and will partner in this irreplaceable work. **S**



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