LA Phil Affiliates: Fundraising Workshops II and III
Presenters:

Melanie Sanguinet
Manager, Volunteer Activities
Los Angeles Philharmonic Association

David Clark
President, Business & Professional Committee
Los Angeles Philharmonic Affiliates
Objectives of Fundraising Workshop

For Los Angeles Philharmonic Association ("LAPA"):  
- Communicate fundraising goals to Affiliates  
- Provide Affiliates with tools to succeed  
- Forge closer partnership between LAPA and Affiliates  

For Affiliates  
- Improve fundraising skills of the Affiliates  
- Work toward Affiliates’ Six-Year Strategic Plan  
- Forge closer partnership between the Los Angeles Philharmonic Association and the Affiliates
Development Mentors

- Director, Institutional Giving
- Director, Individual Giving
- Director, Corporate Sponsorship
- Director, Gift Planning
- Senior Manager, Annual Fund
- Associate Manager, Annual Fund
- Senior Major Gifts Officers
- Senior Manager, Special Events
For Affiliates:

Peninsula Committee

Development Mentor: Julia Cole
Director, Institutional Giving

<table>
<thead>
<tr>
<th></th>
<th>Campaign</th>
<th>Goal</th>
<th>Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012 PF</td>
<td>$17,000</td>
<td>$29,217</td>
<td></td>
</tr>
<tr>
<td>2012 Volunteer</td>
<td>$70,000</td>
<td>$61,090</td>
<td></td>
</tr>
<tr>
<td>2013 PF</td>
<td>$25,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2013 Volunteer</td>
<td>$75,000</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Julia Cole Bio

Julia Cole is responsible for securing more than $4 million in gifts each year from foundation, government, and corporate sources. Since joining the LA Phil as Grant Writer in 2008, Julia has seen Foundation and Government support double. Before joining the LA Phil, Julia worked as a consultant for David Bury & Associates in New York City, advancing the development efforts of small and mid-sized arts organizations. Julia began her arts fundraising career at Poets & Writers, a national service organization, where she was part of a two-person development team. Julia has a BA in English and Women’s Studies from the University of Michigan, Ann Arbor, and a MFA in Creative Writing from Sarah Lawrence College. She has a background in choral singing and has studied oboe and piano.

For Mentors:

Development Mentor: Julia Cole
Affiliate Committee: Peninsula
Formed: 1992
Members: 156

<table>
<thead>
<tr>
<th></th>
<th>Campaign</th>
<th>Goal</th>
<th>Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012 PF</td>
<td>$17,000</td>
<td>$25,217</td>
<td></td>
</tr>
<tr>
<td>2012 Volunteer</td>
<td>$70,000</td>
<td>$81,090</td>
<td></td>
</tr>
<tr>
<td>2013 PF</td>
<td>$25,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2013 Volunteer</td>
<td>$75,000</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Volunteer: $ raised from event admission sales, auctions, coffee, etc.
** WR: $ raised from Philharmonic Friends, the Affiliate's version of the Friends membership program

LA Phil Musicians for this Year:
Nathan Cole, violin

Background Information (Previous Year Recap)
The Peninsula Committee Los Angeles Philharmonic (PCLAP) will hold Music Fair II – Historic Roots – A New Experience on Sunday, October 7, 2012, in celebration of the 60th anniversary of the founding of the Peninsula Committee in 1952. Retired Los Angeles Philharmonic Principal Horn Player, William Lane, who joined the Philharmonic in 1973 and performed frequently at Hollywood Bowl and the Music Center for many years, returns from retirement in Missouri to headline this event.

In addition to the 60th anniversary of PCLAP this year, we are also celebrating our 40th year of presenting the Music Fair to the community. Inspired by member Marilyn Tarlton, with the enthusiasm and encouragement of Ernst Pieschmann, our Committee put on the first Music Fair on May 2, 1972. Former conductors of the LA Phil, including Zubin Mehta and Esa-Pekka Salonen, have led the Philharmonic at previous Music Fairs. The purpose of the Fair is threefold: “To give men, women and children of the community the opportunity to hear some of the southland’s finest musicians while enjoying the natural beauty and freshness of the Palos Verdes Peninsula, To create wider, more diversified audiences for the L.A. Philharmonic, To raise money to support the Philharmonic.”

Note 1: the Peninsula Committee is the only one with their own 501(c)(3), so they operate fairly autonomously.

Note 2: *After January, the new President will be Dale Harbour Day.
2012/13 “Tools For Your Toolbox” Roundtable Workshop

1. **Ideas From Other Organizations:** The League and Association of California Symphony Orchestras Conferences (“ACSO”) (Volunteer Office)

2. **Planning Your Events:** How to keep expenses down and keep logistics under control (Special Events Department)

3. **The Power of Words:** Writing a good solicitation/thank you letter (Foundations/Grant Writing Department)

4. **Donor Solicitation Tips:** How to build a relationship and making the ask (Major Gifts Department)

5. **Learning from Within:** Exchange of fundraising ideas between Affiliate Committees
Legacy Giving

by Susan Reardon
Director, Gift Planning

Legacy Giving: An Introduction
Susan Reardon
Director of Gift Planning

Who can be a legacy donor?
Legacy giving is not just for people who:
- can make large cash annual gifts
- have no family members to remember in their estate planning
- have complicated estate plans

There are MANY ways to make a legacy gift.

Ways to Make A Legacy Gift (Part 1)
Bequests
- The advantages:
  - Simple: Just a few sentences in your will or trust
  - Flexible:
    - Can change your mind as your circumstances change
    - Can be for a fixed amount or a fixed percentage of your estate
Fundraising is Like Dating
by Evie DiCiaccio
Director of Development

Fundraising is Like Dating
How to Increase Resources and Build Lifelong Relationships

Affiliate Fundraising Workshop
January 29, 2014

Identification
Finding a Date

Qualification
The First Date

Cultivation
Getting to Know Each Other/
Meeting the Family

Solicitation
The Proposal/Making a
Serious Commitment

Stewardship
Taking care of the relationship

Seven steps to Successful Cultivation
Listen, Listen, Listen
Be culturally sensitive
Pay attention to body language
Speak clearly and at a moderate pace
Give your full attention
Take care of logistics in advance
Share, don’t sell
From a Volunteer’s Perspective:

- Volunteer Activities Must Align with Orchestra’s Mission
- Goals, Boundaries and Expectations Must be Clearly Defined
- Communication Must be Open and Often
- Leadership Training and Succession Planning are Critical
- Mutual Respect is Necessary for a Good Working Relationship
- LAPA Staff Dedicated 100% to Volunteer Activities is Essential to Ensure Maximum Results from Volunteers
Thank you for attending!