Patron Growth and Advancement: 2015 Edition
An Integrated Approach to Sales, Fundraising, & Loyalty

May 26-27, 2015
Cleveland, Ohio
Welcome and Course Overview: 1-1:15pm

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The Andrew W. Mellon Foundation & National Endowment for the Arts
Welcome and Course Overview: 1-1:15pm

Faculty

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  Detroit Symphony Orchestra

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  New York Philharmonic
Welcome and Course Overview: 1-1:15pm

Tuesday, May 26

- 1:00-1:15pm  Welcome and Course Overview
- 1:15-1:45pm  Driving Forces: Why Orchestras Must Change
- 1:45-2:30pm  Understanding the Patron Model
- 2:30-4:00pm  Practical Steps: Patron Development & Sales
- 4:00-4:15pm  Break
- 4:15-5:45pm  Practical Steps: Patron Advancement
- 5:45-5:50pm  Homework Assignment
- 5:50-6:00pm  Q & A
- 6:00pm  Adjourn
Welcome and Course Overview: 1-1:15pm

Wednesday, May 27

- 8:00-9:00am  “What Greater Miracle”  Homework Discussion: Your Loyalty Program Experiences
- 9:00-11:00am  The Lynchpin: Fundamentals to build Patron Loyalty & Engagement
- 11:00-11:15am  Break
- 11:15am-12:30pm  Summary of Learning and Closing Discussion
- 12:30pm  Adjourn
Welcome and Course Overview: 1-1:15pm

Seven Course Takeaways

1. The driving forces behind why orchestras must change
2. What is it that we believe: the concept of “ideal patrons” and how to attract, incentivize, and earn a relationship with them
3. Development of a patron is different from marketing and fundraising
4. Practical strategies for developing a robust patron base – through the lens of the of the patron model
5. Constructive, no-nonsense linkages between traditional marketing and development functions, including board and volunteer leadership alignment
6. Assessment concepts to evaluate your sales and fundraising acumen
7. The Lynchpin: fundamentals to build patron loyalty & engagement.
Simon Sinek

The goal is to do business with people who believe what we believe
Let’s get started

Introductions and Small Group Discussion

1. “Clump” at your table (groups of 2-3), introduce yourselves to one another

2. Simon Sinek says…”The goal isn't to do business with everyone who needs what we have. The goal is to do business with people who believe what we believe.”

Answer this question: Identify your “what,” “how,” and “why”
The goal isn't to do business with everyone who needs what we have.

The goal is to do business with people who believe what we believe.
1:30-1:45pm

DRIVING FORCES:
WHY ORCHESTRAS MUST CHANGE
America's Orchestras are in Crisis
By Philip Kennicott

IS CLASSICAL MUSIC DYING?
By Bill Zuckerman

The Death Of Classical Music in America
By Jonathan Berr

The Lousy State of American Orchestras
By Scott Wilkinson

Is classical music dying already?
By Maya Liberman

Are City Orchestras a Dying Breed?
By Maggie Severns
Our institutions are out of balance
Driving force #2

Classical music participation has declined
Driving force #3

Charitable giving to the arts is challenged
Driving force #4

Excellence is not enough
Why Orchestras Must Change: 1:30-1:45pm

Driving force #5

Village idiots
Driving force #6

Romancing the past
What is your mission vs. your primary line of business...

IF ORCHESTRAS MUST CHANGE...HOW?

A METAMORPHOSIS: LOGIC MODEL
A metamorphosis: logic model

• Among North American orchestras, business as usual may be insufficient. Therefore...

• Executive, Marketing and Development personnel are working more as if a single unit. Why?

• In “prevailing orchestras,” a patron-centric culture is emerging. It recognizes that audiences are our economic engine and philanthropy is our primary revenue. So...

• While music is our mission, the development of patrons is our primary business.
1:45-2:30pm

UNDERSTANDING THE PATRON MODEL
The patron model: grounded in math

Revenue by Source

- 60% Buyer/Donor
- 22% Buyer Only
- 18% Donors Only
Concept: the right patrons

• The first step in managing a patron loyalty-based system is finding and acquiring the right patrons: patrons who will consistently buy tickets, are consistently philanthropic, and will maintain and grow their level of participation for years to come -- patrons whose loyalty can be won and kept

• (adapted from The Loyalty Effect)
Concept: the right patrons

- We need patrons who belong to **two of these three** groups:
  - Some patrons are inherently predictable and loyal, no matter what company they’re doing business with. They simply prefer stable, long-term relationships
  - Some patrons are more generous than others. They buy more and give more, pay for tickets and their pledges promptly, and require less service
  - Some patrons will find your orchestra more valuable than other cultural choices. Orchestras will simply fit better with certain patrons’ interests

*(adapted from *The Loyalty Effect*)
An orchestra’s future viability is primarily tied to radically increasing the collection of multiple, annual ticket buyers to orchestra concerts [subscribers] who are philanthropic – buying and renewing at high levels.

Renewing, multiple ticket buyer + Renewable, philanthropic support = Profile of an ideal PATRON

Why?...
Understanding the Patron Model: 1:45-2:30pm

Why?

Simple pragmatism.

✓ The key to the orchestra’s future viability is philanthropy

✓ The road to increasing philanthropy is paved with a growing cohort of “ideal” patrons: [subscribing] audience members who are philanthropic

✓ Achieving this starts with an institutional obsession in favor of growing “ideal patrons”
Old model: two silos

**Marketing**

- Systems-driven growth of subscribers and single ticket buyers, primarily through broad channels of communication
- PR and media relations, institutional branding, graphic design and production, and market research
- Patron services and systems, including the website, database, and the box office

**Development**

- Systems-driven growth of low-end donors primarily through micro channels of communication
- One-to-one relationships with the Orchestra's highest value donors
- Traditional capital and endowment campaigns, planned giving, institutional giving, board development and patron event planning
- Volunteer Services and fundraising events
New model: 3 business philosophies

- **Acquisition, Branding, & Retention Gateways:**
  - Acquisition & retention of buyers and donors
  - Sales to casual or occasional buyers; broad-based giving
  - Institutional public relations, corporate communications, branding, graphic design & production, and market research
  - Patron acquisition gateways: telemarketing, telefunding, group sales, box office
  - Rentals, Retail, and Front of House

- **Engagement and Loyalty Programs:**
  - Preferential experiences, service, and access defined by “personalized, one-to-many methods” for “ideal patrons”
  - Subscription sales, cross-patron benefit programs
  - Mid-level donor clubs and programs

- **Philanthropy and Advancement:**
  - One-to-one relationships with the Orchestra's highest value patrons
  - Traditional capital and endowment campaigns, planned giving, institutional giving; prospect research
  - Board development and patron events
  - Volunteer Services and fundraising events

Evolution of an ideal patron
Patron model continuum

- Consumers [hundreds of thousands]
- Ideal Patron [tens of thousands]
- “Difference Makers” [hundreds]
Understanding the patron model

- A conceptual framework:
  - Patron Development & Sales – (broad-based patron gateways: single tickets, low-end givers)
  - Patron Loyalty & Engagement – (an intentional program of preferential experiences, service, and access through “personalized, one-to-many methods”)
  - Patron Advancement – (one-to-one relationships with the Orchestra's highest value patrons)
Understanding the Patron Model: 1:45-2:30pm

Quintessential patron framework

**Team:** Patron Development

**Strategic Goal:** To bring the DSO in contact with as many people as possible

**Philosophy:** Nurture a possibility

**Metric:** Volume

---

**Team:** Patron Engagement

**Strategic Goal:** To pursue a relationship between the DSO and its audience

**Philosophy:** Nurture a relationship

**Metric:** Retention plus Growth

---

**Team:** Patron Advancement

**Strategic Goal:** To secure the long-term fiscal sustainability of the DSO

**Philosophy:** Nurture an identity

**Metric:** Revenue

---

**Consumer:** New or occasional attendee or donor

**Patron:** Regular attendee and/or donor

**MVPs:** Lifetime and legacy attendee and donor
Executive Vice President
(patron model assignments only)

Patron Development and Sales
Advertising, Direct Mail, Telemarketing & funding, Retail, Rentals, Front of House, Box Office, Concessions

Patron Engagement and Loyalty Programs
Patron Relationship Management, Customer Service, Fulfillment and Processing, Database, Digital Media

Patron Advancement
Board & Volunteer Relations, Major & Legacy Giving, Institutional Giving (Corporate, Foundation, Government), Special Events, Public Relations & Communications
New York Philharmonic

Vice President, Marketing, Brand and Customer Experience

Direct Marketing, Advertising, E-marketing; Customer Service, Box Office, Group Sales; Relationship Marketing

Vice President, Development

Annual Giving, Foundation & Corporate, Special Events, Endowment, Planned Giving, Capital
Discuss in your “clumps”:

- In your orchestra, how have you defined your “ideal patron?”
- Share examples of how your sales and fundraising are calibrated to the patron continuum
Applying the patron model

- **Working individually:**
  - What are 2-3 things you are doing in your orchestra which are consistent with the “patron model?”
  - 1
  - 2
  - 3
  - What is one thing you are doing in your orchestra which is inconsistent with the “patron model?”
  - 1
  - Having considered these, what are you prepared to do about it?
2:30-4pm

PATRON DEVELOPMENT & SALES
Our agenda

• Patron Growth Initiative

• Marketing Smarter
  • Market studies and how you apply them
  • Audience studies and how you apply them
  • Communications that connect

• Real-World Examples
  • Pittsburgh Symphony
  • New York Philharmonic
  • Guthrie Theater
  • Concerts in the Parks

• What We Are NOT Discussing: Tactics
CAN I PLEASE JUST BUY THIS PACK OF GUM WITHOUT HAVING TO "ENGAGE WITH THE BRAND?"

NO. WHERE'S YOUR LOYALTY CARD?
Patron Development & Sales: 2:30-4pm

Patron model continuum

- Consumers [hundreds of thousands]
- Ideal Patron [tens of thousands]
- “Difference Makers” [hundreds]
Classic consumer adoption model (funnel)

- Awareness
- Consideration
- Trial
- Repeat
- Commitment
Know where the money comes from: the patron growth initiative

- 1.2 Million Concertgoers and Donors from 10 Orchestras
  - Boston, Chicago, Cincinnati, Cleveland, Houston, LA, NSO, NY, Philadelphia, Seattle
- Tracked all Ticket Purchases and Donations for 10 Years
- Two-Stage Process:
  - Datamining
  - Survey Research (16,000 HH)
- **Goal:** Determine how orchestras can increase the total lifetime value of their patrons in order to achieve a more sustainable, long-term stream of support.
- Research, Analysis and Recommendations: Prescott & Associates
Patron Development & Sales: 2:30-4pm

Patron commitment segments

Donor Commitment
- Loyal Donors
- One-time/Uncommitted Donors

Buyer Commitment
- Lapsed Subscribers
- STBs/Multi-buyers
- Newer/Reactivated Subscribers
- Transitional Buyers
- Buyer Donors
- Loyal Subscribers
- Extreme Patrons

Note: Extreme Patrons defined as HHs with $50,000+ generated revenue in FY05-FY14
Behavioral Patron Clusters
-- FY05-09 Buyer/Donor Penetration and Average$ --

Summary Statistics:
% Buyers / Ave. Ticket$ per HH
% Donors / Ave. Gift$ per HH

Heavy Donors
$5,000+

Donors

Loyal Donors
27% / $136
100% / $3,949

One-time/Uncommitted Donors
6% / $14
100% / $569

Medium Donors
$1,250-4999

LightDonors
$375-1,249

Average FY05-09 Gift$

Very Low Donors
$100-374

Non-Donors
<$100

Non-Buyers
<$125

Very Low Buyers
$125-374

Light Buyers
$375-999

Medium Buyers
$1,000-2,499

Heavy Buyers
$2,500+

Average FY05-09 Ticket$

Buyer Data: % Buyers = % of HHs in cluster who purchased tickets in FY05-09; Ave Ticket$ = Average amount HHs in cluster spent on tickets over FY05-09
Donor Data: % Donors = % of HHs in cluster who made a donation in FY05-09; Ave. Gift$ = Average total gift per HH in cluster over FY05-09 period

Source: Total PGI data

Extreme Patrons
95% / $9,071
68% / $34,974

Loyal Subscribers
100% / $4,198
68% / $2,559

Transitional Buyers

Lapsed Subscribers
100% / $959
27% / $332

Newer Subscribers/Multi-buyers
100% / $1,078
27% / $289

One-time/Uncommitted Buyers
100% / $163
4% / $16
FY05-FY14 patron segmentation

% of Total Households

- Extreme Patrons: 5%
- Loyal Subscribers: 4%
- Loyal Donors: 5%
- One-time Donors: 5%
- Newer Subscribers: 72%
- STBs/Multi-buyers: 0%
- Lapsed Subscribers: 20%
- One-time/Uncom. Buyers: 40%
- 2% of HHs: 72%

Note: Extreme Patrons defined as HHs with $50,000+ generated revenue in FY07-FY14.
FY05-FY14 revenue sourced by patron segments

- Extreme Patrons: 72%
- Loyal Subscribers: 24%
- Loyal Donors: 7%
- One-time Donors: 4%
- Newer Subscribers: 7%
- STBs/Multi-buyers: 4%
- Lapsed Subscribers: 1%
- One-time/Uncom. Buyers: 4%

% of HHs vs % of Revenue

LAO: 2015
Donations penetration by orchestra attendance tenure
-- Total Sample --

Donations typically lag orchestra concert attendance tenure by 10+ years.

38% of total patrons report ever donating.

REPORTED ORCHESTRA ATTENDANCE TENURE: TOTAL YEARS ATTENDING
Key recommendations

• **Drive attendance frequency through compelling concert experiences**
  • In order to increase total lifetime value, the first thing orchestras should do is increase attendance frequency
  • Orchestras should offer concerts consumers are *compelled* to attend, willing to pay a reasonable price for, and leave with their expectations exceeded. Can’t miss this step

• **Focus fanatically on better relationships.**
  • Significantly greater lifetime value comes from patrons who feel personally close, well connected to, and highly valued by their orchestra

• **Put patrons at the core**
  • Adopt an integrated marketing, development and artistic approach to jointly build relationships, increase engagement, fit easily into patrons’ lives, and demonstrate high value.
1. DRIVE FREQUENCY AND TENURE THROUGH COMPELLING CONCERT EXPERIENCES
## Primary reasons for attending

### NET: CONCERT-RELATED
- **Concert/event sounded interesting**: 57%
- **To hear particular composition**: 44%
- **To hear particular composer**: 36%
- **To hear particular guest soloist**: 23%
- **To hear particular conductor**: 19%
- **Had subscription**: 27%

### NET: SOCIAL REASONS
- **Student/went for class**: 24%
- **Curious to see what it was like**: 21%
- **Special event/gala**: 4%

### NET: OTHER FACTORS
- **Was in town visiting**: 11%
- **Got discount offer**: 8%
- **Was given tickets**: 4%
- **Someone took me**: 4%
- **Curious to see what it was like**: 2%
- **Student/went for class**: 1%

**Purchase decisions are based foremost on concerts patrons believe they will enjoy.**
Importance of concert elements in attendance decisions

- **Composers on program**
  - Very Important: 63%
  - Somewhat Important: 29%
  - Not Too Important: 6%
  - Not At All Important: 2%

- **Compositions being performed**
  - Very Important: 61%
  - Somewhat Important: 32%
  - Not Too Important: 6%
  - Not At All Important: 3%

- **Specific guest soloists**
  - Very Important: 27%
  - Somewhat Important: 49%
  - Not Too Important: 20%
  - Not At All Important: 4%

- **Specific conductors**
  - Very Important: 20%
  - Somewhat Important: 46%
  - Not Too Important: 28%
  - Not At All Important: 6%
Interest in classical music periods

Baroque: 71%
Classical: 84%
Early Romantic: 92%
Late Romantic: 84%
Russian Romantics: 83%
20th Cen. Classics: 70%
20th Cen. Modern: 28%
Contemporary: 25%

Measure: 3 or 4 on 4-pt scale
Interest in classical music periods

All Orchestras

Baroque: 76%
Classical: 87%
Early Romantic: 83%
Late Romantic: 87%
Russian Romantics: 88%
20th Cen. Classics: 85%
20th Cen. Modern: 81%
Contemporary: 68%
Interest in classical music periods

- Late Romantic
- Early Romantic
- Russian Romantic
- Classical
- 20th Century Classics
- Baroque
- 20th Century Modern
- Contemporary

Measure: 4-pt scale from 'Love' to 'Don't Care For'
Concert enjoyment factors
--- Would Make Concerts More Enjoyable ---

Greater enjoyment is derived from more context and programs aligned with patron preferences.

Overall pattern held across clusters.

LAO: 2015
Donation motivations

1. Believe the orchestra is important community asset
2. Love the orchestra and want to support it
3. Love classical music and want to support it
4. Want to help ensure their future
5. Enjoy their concerts so like to give back
6. I believe in their mission/cause
7. To help ensure high artistic quality
8. In appreciation of musicians' talent
9. To help bring classical music to wider community
10. Appreciate their commitment to community
11. To support educational programs for children
12. Because ticket sales don’t cover costs
13. Like being member/part of the family
14. Appreciate benefits/perks
15. Like being major supporter of the orchestra
16. Like to make gift with subscription

Overall pattern holds across age cohorts

Q: For what reasons do you donate to this orchestra? (Click the more important reasons for you)
2. BUILD STRONGER BRAND RELATIONSHIPS
Patron perceptions of relationship with orchestra

Very low top box (1) scores

Deserves my support
- 15% very low
- 33% low
- 38% neutral
- 12% high
- 2% very high

Needs my support
- 11% very low
- 29% low
- 40% neutral
- 16% high
- 4% very high

Plays what I like
- 9% very low
- 34% low
- 40% neutral
- 12% high
- 5% very high

Does more for me than I do for them
- 11% very low
- 24% low
- 47% neutral
- 16% high
- 2% very high

Treats me like a valued patron
- 9% very low
- 25% low
- 45% neutral
- 17% high
- 4% very high

Is very responsive to my needs
- 6% very low
- 21% low
- 53% neutral
- 16% high
- 4% very high

Fits easily into my life
- 9% very low
- 23% low
- 32% neutral
- 21% high
- 15% very high

Cares about me as a person
- 3% very low
- 11% low
- 47% neutral
- 33% high
- 7% very high

Overall pattern of low Ratings presents a picture of generally weak brand relationships.
Patron perceptions of relationship with orchestra

<table>
<thead>
<tr>
<th>Perception</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Would miss them terribly if they went away</td>
<td>31%</td>
<td>37%</td>
<td>22%</td>
<td>8%</td>
<td>2%</td>
</tr>
<tr>
<td>Have never had a problem with them</td>
<td>31%</td>
<td>36%</td>
<td>25%</td>
<td>7%</td>
<td>4%</td>
</tr>
<tr>
<td>Always recommend them to my friends</td>
<td>17%</td>
<td>32%</td>
<td>32%</td>
<td>15%</td>
<td>4%</td>
</tr>
<tr>
<td>Hear a lot about what they’re doing</td>
<td>12%</td>
<td>33%</td>
<td>36%</td>
<td>16%</td>
<td>3%</td>
</tr>
<tr>
<td>Think about them often</td>
<td>6%</td>
<td>19%</td>
<td>39%</td>
<td>31%</td>
<td>5%</td>
</tr>
<tr>
<td>Feel like a part of the orchestra’s family</td>
<td>3%</td>
<td>11%</td>
<td>34%</td>
<td>36%</td>
<td>16%</td>
</tr>
<tr>
<td>Feel like they know who I am</td>
<td>2%</td>
<td>28%</td>
<td>35%</td>
<td>30%</td>
<td>5%</td>
</tr>
</tbody>
</table>

While patrons would miss their orchestra, feelings of closeness are especially weak.

LAO: 2015
Brand relationship factors

-- Respect and Good Customer Service --

Similar scores across clusters means no relationship to patron commitment (I respect you doesn’t mean I love you).

Is a highly respected organization
Have never had a problem with them

One-time/Unc. Buyers Lapsed Subscribers One-time/Unc. Donors Newer Subs/Multi-buyers Loyal Donors Loyal Subscribers Extreme Patrons
Brand relationship factors
-- Care/Reciprocity --

Perceptions of care and reciprocity are highly correlated with patron commitment.

Weak across all but Extreme Patrons
Brand relationship factors

-- Closeness/Attachment --

Feelings of closeness are highly correlated with commitment.

<table>
<thead>
<tr>
<th>Feelings of Closeness</th>
<th>One-time/Unc. Buyers</th>
<th>Lapsed Subscribers</th>
<th>One-time/Unc. Donors</th>
<th>Newer Subs/Multi-buyers</th>
<th>Loyal Donors</th>
<th>Loyal Subscribers</th>
<th>Extreme Patrons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Would miss them terribly if went away</td>
<td>16%</td>
<td>14%</td>
<td>16%</td>
<td>16%</td>
<td>64%</td>
<td>64%</td>
<td>64%</td>
</tr>
<tr>
<td>Always recommend them to friends</td>
<td>45%</td>
<td>42%</td>
<td>47%</td>
<td>55%</td>
<td>55%</td>
<td>55%</td>
<td>55%</td>
</tr>
<tr>
<td>Feel strongly connected to</td>
<td>23%</td>
<td>21%</td>
<td>27%</td>
<td>28%</td>
<td>32%</td>
<td>32%</td>
<td>37%</td>
</tr>
<tr>
<td>Think about them often</td>
<td>40%</td>
<td>38%</td>
<td>43%</td>
<td>47%</td>
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</tr>
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<td>Feel like a part of the family</td>
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<td>10%</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
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</tr>
</tbody>
</table>

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LAO: 2015
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One of the strongest correlations with commitment is ease of fitting orchestra into one’s life.
Brand relationship factors

-- Desire to Support --

Stronger brand relationships translate directly to greater desire to support.

Deserves my support
Needs my support
Am very eager to support

One-time/Unc. Buyers
Lapsed Subscribers
One-time/Unc. Donors
Newer Subs/Multi-buyers
Loyal Donors
Loyal Subscribers
Extreme Patrons

Version: 5/23/15
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Orchestra brand relationship typology

Q: Think about you and this orchestra in terms of being in a relationship, as if the orchestra was another person. Please describe the type of relationship you have and explain a bit about why you think that.

**Partnerships**
- Marital/Love
- Insider
- Family Member
- Good/Close Friends

**Acquaintanceships**
- Acquaintances/Causal Friends
- Distant Friends (distance)
- Distant Acquaintances
- Distant Cousin/Aunt/Uncle
- One-Night Stands
- Neighbors
- Business

**Compartmentalized Partnerships**
- Fan/Supporter
- Admirer
- Teacher-Student/Mentor

**Negative/Disjointed**
- Love-Hate Relationship
- Damaged Friendship
- Unequal/One-sided
- No Relationship
- Not Interested

Source: Brand Relationship Typology was developed based on coding 7,787 verbatim responses to the above question.
Partnerships

• Deep closeness, long-term commitment
• Intimacy, warmth, deep affection
• Rewarding and mutual

“It’s like my beloved wife.”

“I'd think of the orchestra as a parent. It is nurturing, soothing, comforting, challenging, educational, wise, welcoming.”

“A cherished friend, warm, constant, clever and talented. No explanation required, she's just there!”

“Inextricably bound to one another . . . one of my most significant relationships.”
Compartimentalized partnerships

“This orchestra is Cincinnati's pride and joy. It’s wonderful to know that it’s one of the best in the nation.”

“Admire and respect from a distance with limited personal interaction. Similar to an elected official that I respect and have heard speak.”

“Excellent teacher and willing student.”

• Pride, support, appreciation
• Awe, admiration, respect
• More one-sided than even playing field
Acquaintanceships

- Comfortable but not close
- Likeable but limited, distant
- Inconvenient, impersonal, transactional

“Like a distant cousin I see very rarely. Have fun when I see them, but don't feel any need to make a special effort to see them more often. When it happens, it happens.”

“I look to hook up occasionally, not have a steady relationship.”

“Someone who looks familiar and I might even know their name but we don't talk.”

“Business relationship—that’s it. If you put on concerts I like, I will go.”
Negative/disjointed relationships

“Love - hate. For 4 years we asked to change our seats to the aisle of our row and never received a response.”

“Reminiscent of my first wife: beautiful but haughty. Does as she pleases with no regard for my opinion and freely spends my money without asking.”

“A relationship implies reciprocity. The orchestra treats me as though I were an anonymous one among thousands of others. Not flattering, and not very friendly.”

“Dysfunctional; the orchestra is about the orchestra, and nothing beyond that.”

• Disappointment, frustration
• Impersonal, cold, one-sided
• Spoiled, self-absorbed, out-of-touch
Orchestra brand relationships

-- By Cluster --

<table>
<thead>
<tr>
<th>Category</th>
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<tbody>
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<tr>
<td>Loyal Donors</td>
<td>32%</td>
<td>32%</td>
</tr>
<tr>
<td>Loyal Subscribers</td>
<td>42%</td>
<td>22%</td>
</tr>
<tr>
<td>Extreme Patrons</td>
<td>56%</td>
<td>10%</td>
</tr>
</tbody>
</table>
3. PUT THE PATRON AT THE CENTER
Current orchestra operating model
Artistic product at core with organizations structured to support product

- Schools Community
- Education
- Development
- Marketing
- Customer Relations
- Information Technology
- Public Relations
- Subscribers Single Ticket Buyers
- Donors Funders Corporate Sponsors
- Press/Media External Communities

Version: 5/23/15
LAO: 2015
Alternative orchestra operating model

Patrons at core with orchestras structured to build closeness, connections, and partnerships

Greater connections to concerts

Better connections with classical music community

Closer connections to the brand

Note: This chart is for illustrative purposes and focuses on the organizational functions most responsible for revenue.
MARKETING SMARTER:
LISTENING TO THE AUDIENCE
The Young & Rubicam brand asset valuactor
19,500 brands studied among 350,000 consumers since 1993

Lagging Indicators: The Current Power of the Brand

Leading Indicators: The Growth Potential of the Brand

Esteem
• How good are they? Perception of quality and delivery of the brand promise.

Knowledge
• How much do I know about them? Level of awareness of the brand.

Differentiation
• Do they stand apart? Strong differentiation leads to more trial and less substitution.

Relevance
• Do they matter to me? If a brand is not personally relevant, it will not attract or retain consumers
“It’s astounding how much of what’s spent on marketing has no impact on growth. What grows market share is relevance.”

-- David Aaker
What Young & Rubicam found about differentiation and relevance

“Brands that grow their Differentiation have about a 50% higher operating margin on average than those which allow their Differentiation to decline.

“Relevance is the key to market penetration.”

“Those brands that grow both their Differentiation and Relevance report the greatest increase in operating earnings.”
The two biggest reasons marketing efforts fail

Orchestras Don’t Know Enough About Their Audience To Do Good Marketing

Orchestras Don’t Know how to Apply Customer Knowledge Strategically
Marketing Seen as a Department, not an Organization-Wide Imperative
Not Integrated with Mission
What orchestras don’t know about their audiences and their markets

Who Goes?

Why Do They Go?

What Do They Think Of Us?

Why Did The People Who Used To Go Leave Us?

How Do We Get People to Come More Often?

How Do We Reach Them?

How Do We Grow?
What *is* marketing, anyway?

“The aim of marketing is to understand the customer so well that the product or service fits him/her and sells itself.”

-- Peter Drucker
“The aim of marketing is to **understand the customer** so well that the **concert experience** fits him/her and sells itself.”

--- Peter Drucker
Knowledge = knowing. Not assuming.

“It isn’t what you don’t know that’ll get you, it’s what you think you know that just ain’t so.”

-- Will Rogers
What do you need to know?

• **Who attends**
  • Why they attend -- specifically
    • Concert experience preferences (programming, seating, format etc)
    • Satisfaction
  • How often they attend, over time
    • Segment by tenure and frequency, esp. first-timers
  • How to get them to attend more often & become a donor

• **Who used to attend, but no longer does**
  • Why they left, and how to get them back

• **Who likes what you do, but isn’t attending**
  • Who they are
  • How to reach them
  • Why they don’t attend and how to activate them
For all the above segments. . .

- What do they think of you – brand perceptions
  - Current
  - Aspirational

- What else they do – competitive set and perceptions thereof

- How to communicate with them
  - Which channels/media to use
  - What to say

- Which marketing efforts work, and why
Differentiation and relevance in action

• 2 Key Concepts of Brand Strategy that are all about Differentiation and Relevance:
  • Positioning
    • Creating a brand meaning that connects the functional attributes of the product (what it does) with an emotional consumer end benefit (why that matters to you) that you can own. Allows you to create a point of difference with the competition
  • Segmentation
    • Looking at discrete types of customers that have things in common (behaviors, preferences, lifestyles etc.) which unite them and are different from other types of customers.
      • Behavioral: Heavy, Medium, Light and Non-Attenders
      • Psychographic/Attitudinal: Culture Vultures, Social Butterflies, Families First

• To get started, let’s take a walk down the frozen food aisle. . .
smoothered chicken

herb-seasoned chicken breast strips with fire-roasted chiles, red pepper and monterey jack & cheddar cheeses with rice and a corn medley
Healthy Choice

Grilled White Meat Chicken with Smokehouse BBQ Sauce

- Apple Cranberry Crisp
- Vegetable Medley
- Rice Pilaf

Net wt 12 oz (340g)  KEEP FROZEN; COOK THOROUGHLY

Serving Suggestion

5g Fat  370 Calories  600mg Sodium

Complete Selections™

American Heart Association
Made from beads from beet.  Home to regular for 14g of total fat and 600mg of cholesterol.  See side panel for nutritional information on manufacturing and how to be green.

LAO: 2015
Communicating the positioning
As opposed to this...
So how do you become relevant to consumers?

- Talk to them - conduct research
- **Qualitative**
  - Focus groups, one-on-ones
- **Quantitative**
  - Surveys, data mining
- **Market Studies**
  - Increase relevance among inclined non-attenders
- **Audience Surveys**
  - Increase frequency and retention among current audience
Goals of market studies

Understand the total market for your product, not just those who are already attending.

- Size of market, your penetration and share
- Brand perceptions and barriers to attendance
- Competitive landscape
- Guidance for increasing relevance
  - Where to take the brand
  - How to change programming, concert experience
- Market segments
  - Behavioral
  - Psychographic
Some People Don’t Give a Shit About Art.
Pittsburgh classical music market: size

Not Interested in Classical Music (883,273) 94%
PSO Classical Attendees (13,200) 1%
Like Classical, Don't Attend (50,300) 5%

LAO: 2015
Pittsburgh classical music market: segments

- Kids First: 37%
- Couch Potatoes: 26%
- Crazy Life: 13%
- Heavy Arts: 8%
- Classical Elite: 16%

LAO: 2015
Pittsburgh Symphony attender segments

- Classical Elite: 38%
- Kids First: 22%
- Crazy Life: 14%
- Heavy Arts: 11%
- Couch Potatoes: 15%

LAO: 2015
Market studies help you know where you fit in the consumer adoption funnel

**KEY OPPORTUNITY FOR IMPROVING PERFORMANCE AMONG AFICIONADOS IS TO MOVE CUSTOMERS FROM CONSIDERATION TO REGULAR ATTENDANCE**

Percent

```
Awareness | Consideration | Trial in last 12 months | Regular | Subscribers

Afícionados
New York Philharmonic
Carnegie
Met Opera

Frequency of attending NYP per year
```

Source: Prescott research; team analysis
Public Relations
Media Advertising

Awareness
Consideration
Trial
Repeat
Commitment

Brand image that creates positive expectations
Interest in classical music

FIRST DATE!
Single ticket advertising
Attractive offer

Concert satisfaction
Come-back offer

Delivering on Promises in the Hall
Lifetime Value
Relationship Marketing

Brand
Concert Sales
Relationship

LAO: 2015
A few words about repeat, subscription and donation

- Database and Relationship Marketing are primary tools
- Identify downgraders, incentivize upgraders
- Recognize and reward loyalty, establish barriers to exit.
- Lifetime Value Is Where it’s At
- Ultimately, concert satisfaction trumps all else.
Another way to look at moving people up the funnel.

Number of Classical Concerts Attended Past Year
By Familiarity & Enjoyment of Attending Classical Concerts

<table>
<thead>
<tr>
<th>Enjoy Extremely</th>
<th>Enjoy Very Much</th>
<th>Enjoy Somewhat/Not</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extremely Familiar</td>
<td>10.0</td>
<td>3.2</td>
</tr>
<tr>
<td>Very Familiar</td>
<td>6.3</td>
<td>4.9</td>
</tr>
<tr>
<td>Somewhat/Not Familiar</td>
<td>3.4</td>
<td>1.4</td>
</tr>
<tr>
<td>Extremely</td>
<td>0.8</td>
<td>0.6</td>
</tr>
</tbody>
</table>

L AO: 2015
The New York classical music market

Don't Like Classical
(8,624,234)
93.0%

Like Classical, Don't Attend
(605,963)
6.5%

NYP Attendees
(40,000)
0.4%

LAO: 2015
Target segments

-- Household Population within Target Geographic Area --

- Quiet Intellectuals, 109,954 (17%)
- Socials, 130,294 (21%)
- Busy in the Burbs, 154,112 (25%)
- Conventional Lives, 120,634 (19%)
- Culturals, 115,568 (18%)

TOTAL TARGET POPULATION 355,816
Entertaining evening out
Exciting & energizing music
Richness & wonder of classical
The best orchestra
The best in classical
Profoundly moving, inspiring
Peace, relaxation, tranquility
Fresh, new, exciting
Glamour & romance
A relaxing escape
The best orchestra
Exciting & energizing music
Profoundly moving, inspiring
Entertaining evening out
The best in classical
Exquisite music
Richness & wonder of classical
Absorbs & transports
Touches head, heart, soul
TOP TWO BOX SCORES FOR CHARACTERISTICS DESIRED
Our target segments were all looking for the same thing

- **Quiet Intellectuals**
  - Touches head, heart, soul
  - Profoundly moving & inspiring
  - Music that absorbs & transports

- **Socials**
  - Richness & wonder of classical

- **Culturals**
  - Exquisite music perfectly performed

- **Conventional**
  - Wonderfully entertaining evening

- **Busy In Burbs**
  - Peace, relaxation, tranquility
  - Evening of glamour & romance

- **Exquisites**
  - Exquisitely performed
  - Best in classical music
Pop Quiz: which message will sell the most tickets?

- We’re one of the best orchestras in the country
- We have acclaimed guest artists
- We have a renowned music director
- We play music you want to hear
- We give you an experience you want
Esteem, knowledge, differentiation or relevance?
Joy, romance, inspiration, passion, energy, enlightenment. Or do you get enough of that at the office?

Looking for a way to recharge after a long work week? Nothing is as nourishing to the spirit as great music. And nobody makes great music like the Pittsburgh Symphony Orchestra. Enjoy one of the great concerts below or, better yet, treat yourself to a PSO Flex coupon book – six coupons redeemable for six tickets to any 2000-01 Classical or Soundbytes subscription series concert. Call today.

**THIS TUESDAY**

**THE PITTSBURGH SYMPHONY CHAMBER ORCHESTRA SERIES**

**Andrés Cárdenes**, leader

**Mozart & Tangos**

NOVEMBER 21

The brilliance of the PSO in an intimate setting, with Mozart’s Symphony No. 25, Vivaldi’s Piccolo Concerto and Piazzola’s spirited tangos “Cuatro Estaciones Porten.”

All concerts in this series are performed at the Katz Performing Arts Center and Heiny Kaufmann Theater in Squirrel Hill. Presented in cooperation with the Y Music Society and Jewish Community Center.

**Hear why Andrés Cárdenes doesn’t play second fiddle to anyone.**

**Copland, Tchaikovsky & Wagner**

DECEMBER 1, 2, 3

**James Conlon**, conductor

**Andrés Cárdenes**, violin

Our own Andrés Cárdenes is in the spotlight for Tchaikovsky’s Violin Concerto. Plus Copland’s *Outdoor Overture* and Wagner’s overtures from *Lohengrin*, *Tannhauser* and *Die Meistersinger*.

**In old Vienna, the holiday halls were decked with beautiful music like this.**

**Mozart for the Holidays**

DECEMBER 8, 9

**Matthias Bamert**, conductor

**Peter Sullivan**, trombone

An evening of seasonal delights: sublime music by Mozart and friends, a decked-out Heinz Hall lobby starring the magnificent Heinz Hall Christmas tree, and tasty egg nog and wassail to put you in the holiday spirit.

BUY ONLINE @WWW.PITTSBURGHSYMPOHONY.ORG

CALL 412-392-4900 FOR TICKETS

HEINZ HALL FOR THE PERFORMING ARTS, 800 PENN AVE.
As the music soars, so do your spirits.

Looking for a way to recharge after a long work week? Nothing is as nourishing to the spirit as great music. And nobody makes great music like the Pittsburgh Symphony Orchestra. Enjoy one of the great concerts below or, better yet, treat yourself to a PSO Flex coupon book - six coupons redeemable for six tickets to any 2000/01 Classical or SoundBytes subscription series concert. Call today.

THIS WEEK

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**Copland, Tchaikovsky & Wagner**

December 1, 2, 3

James Conlon, conductor Andrés Cárdenes, violin

Our own Andrés Cárdenes is in the spotlight for Tchaikovsky’s Violin Concerto. Plus Copland’s Outdoor Overture and Wagner’s overtures from Lobengrin, Tannhäuser and Die Meistersinger.

On December 5th, the Pittsburgh Symphony welcomes home an old friend.

**Lorin Maazel**

December 5 7:30 PM

One of today’s preeminent conductors, Pittsburgh native, and the Pittsburgh Symphony Orchestra’s former Music Director - is coming home to Heinz Hall. Celebrate his return at this exciting benefit concert for the PSO, featuring Dvořák’s New World Symphony.

Sponsored by PNCADVISORS WEDPITTSBURGH

Special $159 benefit price includes concert ticket and post-concert reception with a chance to meet Lorin Maazel! Call 412-392-4012 for tickets.

In old Vienna, the holiday halls were decked with beautiful music like this.

**Mozart for the Holidays**

December 8, 9

Matthias Bamert, conductor Peter Sullivan, trombone

An evening of seasonal delights: sublime music by Mozart and friends, a decked-out Heinz Hall lobby starring the magnificent Heinz Hall Christmas tree, and tasty egg nog and Wassail to put you in the holiday spirit.

BUY ONLINE @WWW.PITTSBURGSYMHPHONY.ORG

CALL 412-392-4900 FOR TICKETS

Heinz Hall for the performing arts, 600 Penn Ave.
Music is like dessert. It’s so much sweeter when it’s freshly made.

Have you tasted any fresh music lately? If you’ve been surviving on that canned stuff that comes out of the radio or CD player, have we got a treat in store for you! The Pittsburgh Symphony serves up some of the most delicious musical creations of all time with the exquisite flavor and attention to detail that only

Evelyn Glennie
APRIL 6 & 8 ONLY

Ingo Metzmacher, conductor
Evelyn Glennie, percussion
The Mendelssohn Choir of Pittsburgh

Evelyn Glennie’s amazing percussion mastery “evokes magic and poetry.”* Hear for yourself in this program that includes Beethoven’s Calm Sea and Prosperous Voyage, Debussy’s Three Nocturnes and more. Free pre-concert preview one hour before concert time!

* Neue Nachrichten

PITTSBURGH SYMPHONY ORCHESTRA
Mariss Jansons • Music Director

GET TO KNOW MAHLER

Previn Conducts Mahler
APRIL 20 & 22 ONLY

André Previn, conductor
Special Concert Format

Friday, April 20: “The World of Mahler” a special presentation by Michael P. Steinberg at 7:30 p.m.; Previn conducts Mahler’s towering Symphony No.9 at 8:15 p.m.

Saturday, April 22: “The World of Mahler” at 2:00 p.m.; performance at 2:45 p.m.

CALL 412-392-4900 FOR TICKETS
GROUPS OF 20 OR MORE CALL 412-392-4819

American Express presents

Shakespeare’s Greatest Hits
APRIL 21

Alexis Hanauer, conductor • Tim Hartman, host

Get hip to the genius of Shakespeare. Discover how composers were inspired by Romeo and Juliet, A Midsummer Night’s Dream and much more—all “As You Like It”, in the refreshingly unstuffy Soundbytes format.

Heinz Hall for the performing arts, 600 Penn Ave.

* London Evening Standard
It’s like listening to a great movie soundtrack without the bad film to distract you.

No film could capture the images you see in your mind’s eye when a great piece of music transports you. The goose bumps, the tears, the enchantment, they’re all there as the sound envelopes and lifts you up and away from the nagging responsibilities and incessant details that can make up a typical weekly routine. Join us as the Pittsburgh Symphony Orchestra, “one of the finest on the planet”\(^*\) fills beautiful Heinz Hall with the passion of Mozart, the drama of Romeo and Juliet and the charm and humor of “The Lion King.” Now there’s a film worth listening to! For tickets, call 412-392-4900 today.

\(^*\) London Evening Standard

**PITTSBURGH SYMPHONY ORCHESTRA**  
Mariss Jansons • Music Director

### Today at 2:30!

**The Glories of Mozart’s Songs**  
FEBRUARY 25

**Mariss Jansons**, conductor  
**Thomas Quasthoff**, bass-baritone

“One of the most exciting artists to emerge in many years”\(^*\) sings favorites from Don Giovanni, Marriage of Figaro and more. Also: Mozart’s Symphony No. 35 and Schubert’s Fifth Symphony. Join our free pre-concert preview one hour before concert time!  
*San Francisco Chronicle  
“Stay for a Post- Concert Conversation on Feb. 25, where you can ask questions of Mariss Jansons and Todd Thomas.”  
*Mellon Auditorium Notes

### Today at 8:00!

**Vladimir Feltsman & “Romeo and Juliet”**  
MARCH 9 & 10

**David Zinman**, conductor  
**Vladimir Feltsman**, piano

The famed Russian virtuoso plays Ravel’s sumptuous Concerto for the Left Hand, and David Zinman leads Berlioz’ dramatic Romeo and Juliet. Join our free pre-concert preview one hour before concert time!

### Fiddleticks Family Concert

SATURDAY  
MARCH 10  
11:15 AM

**Lucas Richman**, conductor

Bring your whole family to meet Fiddleticks and his musical family, with music from “Cats”, “The Lion King” and much more. Pre-concert games and learning activities begin at 10:15 in the lobby.

*Supported by:* [P&G](http://www.pg.com) for life

**CALL 412-392-4900 FOR TICKETS**  
GROUPS OF 20 OR MORE CALL 412-392-4819

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**HEINZ HALL FOR THE PERFORMING ARTS, 600 PENN AVE.**
NY Phil Strategy: differentiation through relevance

- Entertaining evening out
- Exciting & energizing music
- Richness & wonder of classical
- The best orchestra
- The best in classical
- Profoundly moving, inspiring
- Peace, relaxation, tranquility
- Fresh, new, exciting
- Absorbs & transports
- Touches head, heart, soul
- A relaxing escape
- The best in classical
- Exquisite music
- Richness & wonder of classical
- Entertaining evening out
- Glamour & romance
The New York Philharmonic brand strategy

• Positioning Statement

The New York Philharmonic promises exquisite music, perfectly performed, for a profoundly moving concert experience that touches the head, heart and soul.
He has perfected the finest instrument in the world
Thank you, Kurt Masur
The 2006/07 Season Music you feel.
Music you feel.

Introducing Philharmonic Minis
New 3 and 4 concert series
Music you feel.
Create Your Own Series
Customize your 4-concert collection

New York Philharmonic
Lorin Maazel Music Director
New York Philharmonic
Lorin Maazel Music Director

Music you feel.
NEW YORK PHILHARMONIC
2008/09 season

Lorin Maazel ~ A Grand Finale
Entertaining evening out
Exciting & energizing music
Richness & wonder of classical
The best orchestra
The best in classical
Profoundly moving, inspiring
Peace, relaxation, tranquility
Fresh, new, exciting
Glamour & romance
Touched head, heart, soul
Absorbs & transports
Exquisite music
The best in classical
Richness & wonder of classical
Entertaining evening out
Brand perceptions – 2008

- Glamour & romance
- Fresh, new, exciting
- The best orchestra in America

- The very best in classical music
- Richness & wonder
- Entertaining evening out
- Touches head, heart & soul
- Relaxing escape
- Absorbs & transports
- Profoundly moving & inspiring
- Exciting & energizing music
- Peace, relaxation, tranquility
Brand perceptions – 2012

New York Philharmonic Experience (Top-Two Box Scores)

Desired Characteristics (Top-Two Box Scores)

- Fresh, new & exciting
- Relaxing escape
- Entertaining evening out
- Intellectually stimulating
- The very best in classical music
- The best orchestra in America
- Exciting & energizing music
- Absorbs & transports
- Touches head, heart & soul
- Profoundly moving & inspiring
- Richness & wonder
- Exquisite music

30% 40% 50% 60% 70% 80% 90%
LEAP IN

Leap in to be lifted, elevated with energy, suspended by delight.

Feel heavy with richness and light with joy. Let the buoyancy of this music take you LEAP IN to your very NEW YORK PHILHARMONIC.
New York Philharmonic brand personality

- Market Sample -

<table>
<thead>
<tr>
<th>Personality Trait</th>
<th>2007</th>
<th>2012</th>
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</thead>
<tbody>
<tr>
<td>Professional</td>
<td>95%</td>
<td>91%</td>
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<tr>
<td>Respected</td>
<td>93%</td>
<td>93%</td>
</tr>
<tr>
<td>Dedicated</td>
<td>91%</td>
<td>84%</td>
</tr>
<tr>
<td>Successful</td>
<td>89%</td>
<td>86%</td>
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<tr>
<td>Confident</td>
<td>89%</td>
<td>82%</td>
</tr>
<tr>
<td>Intelligent</td>
<td>89%</td>
<td>84%</td>
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<tr>
<td>Sophisticated</td>
<td>88%</td>
<td>82%</td>
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<tr>
<td>Dependable</td>
<td>88%</td>
<td>84%</td>
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<tr>
<td>Proud</td>
<td>84%</td>
<td>84%</td>
</tr>
<tr>
<td>Passionate</td>
<td>84%</td>
<td>83%</td>
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<tr>
<td>Elegant</td>
<td>84%</td>
<td>80%</td>
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<tr>
<td>Powerful</td>
<td>84%</td>
<td>76%</td>
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<td>Engaging</td>
<td>76%</td>
<td>76%</td>
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<tr>
<td>Energetic</td>
<td>73%</td>
<td>69%</td>
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<tr>
<td>Exciting</td>
<td>73%</td>
<td>68%</td>
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<tr>
<td>Warm and welcoming*</td>
<td>67%</td>
<td>61%</td>
</tr>
<tr>
<td>Friendly</td>
<td>64%</td>
<td>44%</td>
</tr>
<tr>
<td>Glamorous</td>
<td>62%</td>
<td>44%</td>
</tr>
<tr>
<td>Conservative</td>
<td>56%</td>
<td>53%</td>
</tr>
<tr>
<td>Adventurous</td>
<td>53%</td>
<td>38%</td>
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<tr>
<td>Progressive</td>
<td>52%</td>
<td>44%</td>
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<tr>
<td>Elitist</td>
<td>47%</td>
<td>41%</td>
</tr>
<tr>
<td>Stuffy</td>
<td>27%</td>
<td>28%</td>
</tr>
</tbody>
</table>

*Warm and caring in 2007
Over past ten years

- Paid Attendance +11%
- Ticket Revenue +44%
- No. of Unique Households Attending + 67%
COMMUNICATIONS THAT CONNECT
2011 • 2012 Classical Season

3 & 4 Concert Series
Built For You

Music inspires
When was the last time you stood and applauded your television?

The Minnesota Orchestra 1994-1995 Season

Edo de Waart, Music Director
Announcing a season of passionate performances.

And no reruns.

There's a moment of magic in every Minnesota Orchestra performance that you just can't get anywhere else. Not from a recording, your radio — and certainly not from your TV set. It's actually the most important part of every concert.

It happens just at the end, in the brief instant after the last notes leave the musicians' instruments, violins still in position and brasses resonating with air.

Then the applause begins. Often the ovation is immediate, loud, even raucous. Other times the performance closes in quiet, sublime delicacy, and the audience pauses, not wanting to break the spell.

Join a season of brilliant nights that'll bring you to your feet. With our convenient new Exchange-by-Phone, Subscriber Hotline and priority seating privileges at discounted prices, you'll find subscribing is easier and more rewarding than ever. We invite you to subscribe today.

“My first concert, a month ago, was beautiful. I imagine this is a taste of what heaven will sound like.”

~ Kathy Heinritz, Minnetonka
First-year subscriber
Fall under the spell of the Guthrie.
POWERFUL. MEMORABLE. INSPIRATIONAL.

The music of the New York Philharmonic.

It’s music that you feel. And performances that you don’t want to miss.
“Classical music speaks to everyone everywhere. The response on the part of young people, at least in my experience in the last few years, in every field of performance — in singing, instrumental playing or conducting — is simply staggering.”

— Lorin Maazel
CLASSICAL MUSIC.

IT DOES SOMETHING TO YOU.

BEST SEATS.
BEST SAVINGS.
You get both when you subscribe.
### Desired qualities in a conductor

<table>
<thead>
<tr>
<th>Quality</th>
<th>TARGET MARKET</th>
<th>STBS</th>
<th>SUBS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inspires the musicians</td>
<td>78%</td>
<td>88%</td>
<td>89%</td>
</tr>
<tr>
<td>Brings the orchestra together</td>
<td>75%</td>
<td>85%</td>
<td>88%</td>
</tr>
<tr>
<td>Very high energy &amp; enthusiasm</td>
<td>71%</td>
<td>72%</td>
<td>70%</td>
</tr>
<tr>
<td>Passionate about classical music</td>
<td>62%</td>
<td>72%</td>
<td>77%</td>
</tr>
<tr>
<td>Respected by the musicians</td>
<td>60%</td>
<td>76%</td>
<td>77%</td>
</tr>
<tr>
<td>Gives emotionally moving performances</td>
<td>60%</td>
<td>75%</td>
<td>65%</td>
</tr>
<tr>
<td>Gives powerful performances</td>
<td>56%</td>
<td>72%</td>
<td>63%</td>
</tr>
<tr>
<td>Relates well to the audience</td>
<td>45%</td>
<td>38%</td>
<td>53%</td>
</tr>
<tr>
<td>In command of the orchestra</td>
<td>41%</td>
<td>49%</td>
<td>53%</td>
</tr>
</tbody>
</table>
Oregon Symphony
Carlos Kalmar, Music Director

08-09

Itzhak Perlman
Joshua Bell
Beethoven Symphony No. 9
Lang Lang
Grieg Piano Concerto
Chris Botti
Thomas Lauderdale
Edgar Meyer
Mendelssohn Violin Concerto
Wynton Marsalis
Ravel Bolero
CELEBRATING
MUSIC DIRECTOR
CARL ST. CLAIR’S
20TH ANNIVERSARY

SHARE THE EXCITEMENT

CLASSICAL
GREATEST
MASTERPIECES
POPS
BIGGEST STARS
FAMILY
FUN TIME WITH MUSIC
SUMMER
MUSIC UNDER THE STARS

PACIFIC SYMPHONY’S 2009-2010 SEASON
A CELEBRATION ONE HUNDRED YEARS IN THE MAKING.
THE SAN FRANCISCO SYMPHONY

MUSIC DIRECTOR
MICHAEL TILSON THOMAS
AUDIENCE RESEARCH
Know how you connect with your audience

Delve into the experience, what it means to them and how well you are connecting with them.

Ask them a question like the following after every performance, collect their verbatim responses, and analyze what they have to say about the performance and the experience.

“Arts performances can affect people in different ways. Can you describe what this particular arts experience was like for you -- the sort of thoughts and feelings you had as you watched the performance?”
Thoughts & feelings about ballet performances

**Giselle:**

“You are transformed to another dimension. Romantic feelings come to mind because of the fairytale-like environment. I feel cultured.”

**Carmina Burana:**

“It was erotic, sensual, passionate and primitive.”

“It took my breath away. I wasn’t able to breathe.”

“I am transformed. Its experiences combined were like paradise to my senses.”

“Pretty wild and spicy! My husband benefited!”
Understanding musical preferences

- Baroque: Subscribers 33%, Single Ticket Buyers 34%
- Classical: Subscribers 50%, Single Ticket Buyers 43%
- Early Romantic: Subscribers 65%
- Russian Romantics: Subscribers 54%, Single Ticket Buyers 46%
- Late Romantic: Subscribers 51%, Single Ticket Buyers 43%
- 20th Century Classics: Subscribers 31%, Single Ticket Buyers 32%
- 20th Century Modern: Subscribers 6%, Single Ticket Buyers 10%
- Contemporary: Subscribers 5%, Single Ticket Buyers 9%

LAO: 2015
Interest in classical music periods
-- Romantic (27%) vs. Contemporary Segment (7%) --
## Why do they go?

<table>
<thead>
<tr>
<th>Reason</th>
<th>Contemporary (N=276)</th>
<th>Romantic (N=1083)</th>
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<tbody>
<tr>
<td>To be enlightened and inspired</td>
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<tr>
<td>For intellectual stimulation</td>
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<td>Interest in a particular art form</td>
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<td>To be entertained</td>
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<td>73</td>
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<td>To relax and enjoy yourself</td>
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<td>To support the arts</td>
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<td>Exposed to different types of arts</td>
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<tr>
<td>To broaden horizons</td>
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<td>31</td>
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<tr>
<td>Evening out with spouse</td>
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<td>To share new experiences</td>
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<td>To escape from daily routine</td>
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<td>To expose children to the arts</td>
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</table>

LAO: 2015
Enjoyment of composers’ works

- Beethoven: Enjoy Extremely/Very Much - 73%, Enjoy Extremely/Much - 97%
- Mozart: Enjoy Extremely/Very Much - 61%, Enjoy Extremely/Much - 92%
- Tchaikovsky: Enjoy Extremely/Very Much - 54%, Enjoy Extremely/Much - 90%
- Brahms: Enjoy Extremely/Very Much - 46%, Enjoy Extremely/Much - 85%
- Bach: Enjoy Extremely/Very Much - 48%, Enjoy Extremely/Much - 83%
- Rachmaninoff: Enjoy Extremely/Very Much - 42%, Enjoy Extremely/Much - 78%
- Gershwin: Enjoy Extremely/Very Much - 42%, Enjoy Extremely/Much - 76%
- Schubert: Enjoy Extremely/Very Much - 34%, Enjoy Extremely/Much - 76%
- Ravel: Enjoy Extremely/Very Much - 29%, Enjoy Extremely/Much - 70%
- Haydn: Enjoy Extremely/Very Much - 28%, Enjoy Extremely/Much - 70%
- Handel: Enjoy Extremely/Very Much - 29%, Enjoy Extremely/Much - 69%
- Debussy: Enjoy Extremely/Very Much - 29%, Enjoy Extremely/Much - 69%
- Mahler: Enjoy Extremely/Very Much - 37%, Enjoy Extremely/Much - 66%
- R. Strauss: Enjoy Extremely/Very Much - 25%, Enjoy Extremely/Much - 63%
- Copland: Enjoy Extremely/Very Much - 27%, Enjoy Extremely/Much - 62%
- Stravinsky: Enjoy Extremely/Very Much - 25%, Enjoy Extremely/Much - 61%
- Wagner: Enjoy Extremely/Very Much - 26%, Enjoy Extremely/Much - 54%
- Bartok: Enjoy Extremely/Very Much - 14%, Enjoy Extremely/Much - 44%
- Schoenberg: Enjoy Extremely/Very Much - 5%, Enjoy Extremely/Much - 18%
- Glass: Enjoy Extremely/Very Much - 4%, Enjoy Extremely/Much - 16%
- Adams: Enjoy Extremely/Very Much - 4%, Enjoy Extremely/Much - 15%
## Comparing programming with consumer preferences

<table>
<thead>
<tr>
<th></th>
<th>% of Season</th>
<th>% Enjoying (Top 2)</th>
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<tr>
<td>Late Romantic</td>
<td>20%</td>
<td>85%</td>
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<td>The Russians</td>
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<td>20th Century Classics</td>
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<td>Contemporary</td>
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<tr>
<td>20th Century Modern</td>
<td>10%</td>
<td>24%</td>
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<tr>
<td>Early Romantic</td>
<td>9%</td>
<td>92%</td>
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<tr>
<td>Classical</td>
<td>6%</td>
<td>85%</td>
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<tr>
<td>Baroque</td>
<td>4%</td>
<td>68%</td>
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Expected enjoyment of four Philharmonic concerts

- Subscribers
- Single Ticket Buyers

- Extremely/Very Much
- Extremely

<table>
<thead>
<tr>
<th>C 1</th>
<th>C 2</th>
<th>C 3</th>
<th>C 4</th>
<th>C 1</th>
<th>C 2</th>
<th>C 3</th>
<th>C 4</th>
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<tbody>
<tr>
<td>93%</td>
<td>74%</td>
<td>82%</td>
<td>92%</td>
<td>96%</td>
<td>89%</td>
<td>91%</td>
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<tr>
<td>55%</td>
<td>26%</td>
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<td>40%</td>
<td>60%</td>
<td>80%</td>
<td>100%</td>
<td>0%</td>
<td>20%</td>
</tr>
</tbody>
</table>
Expected & actual enjoyment

- **C 1**: Extremely/Very Much: 93%, Actual Enjoyment: 55%
- **C 1**: Extremely/Very Much: 88%, Actual Enjoyment: 26%
- **C 2**: Extremely/Very Much: 74%, Actual Enjoyment: 23%
- **C 2**: Extremely/Very Much: 65%, Actual Enjoyment: 38%
- **C 3**: Extremely/Very Much: 82%, Actual Enjoyment: 38%
- **C 3**: Extremely/Very Much: 84%, Actual Enjoyment: 50%
- **C 4**: Extremely/Very Much: 92%, Actual Enjoyment: 63%
- **C 4**: Extremely/Very Much: 68%, Actual Enjoyment: 37%
Thoughts/feelings about concert 1

• “It was an absolute dream come true. I was constantly fighting back tears and wanted to remember every single second of the evening forever. To say I loved it is a complete and total understatement.”

• “I’ve attended many performances of the New York Philharmonic and have never seen such energy, enthusiasm and delight in the audience.

• “This was one of the most entertaining shows I’ve ever attended... Several times I was so absorbed in the performance that I forgot where I was. For me that is the ultimate entertainment. Great show.”

• “Probably one of the most amazing musical experiences I’ve ever had the fortune to see. I felt total joy and awe.”

• “This is really so enjoyable, we wish it could go on for hours.”
Thoughts/feelings about concert 4

• “The Bartok and Beethoven pieces met all my expectations. The young soloists were spectacular. The contemporary piece left me cold. I like new music, but this was bombastic....”

• “The first half of the concert was most enjoyable... However, the second half was long and horrible. While I have sat through long concerts before, and enjoyed them immensely... This concert was truly torture for me.”

• “(Guest) as usual was splendid. ... The contemporary piece was spectacular. I wish audience members would have the courtesy to sit through a piece and not leave in the middle. They were very rude and should be instructed not to repeat their behavior as it interferes with the enjoyment of other people!”

• “The conductor’s remarks prior to the contemporary piece were very constructive, especially after the Times review. I enjoyed the piece more than I anticipated.”
Satisfaction with concert experience - the halo effect

--- Extremely Satisfied ---
USING CUSTOMER KNOWLEDGE TO BUILD AUDIENCE AT THE GUTHRIE THEATER
The Guthrie market segmentation study

- 5% Guthrie Penetration
- 53% Untapped

Implication:
The Twin Cities theater market is far from being tapped. There’s great potential to reach a new audience.
Knowing the market: the four segments of the Twin Cities theater audience

- Escapists: 22%
- Homebodies: 15%
- Frantics: 17%
- Culturals: 46%
Culturals and Frantics represented the best opportunity targets

“Escapists”
- All talk, no action
- “Must Sees”
- Very low Guthrie penetration

“Culturals”
- Strong personal interest in theater
- Community involved
- More than 3 times as likely to attend the Guthrie than Escapists or Homebodies

“Frantics”
- Attend theater, sports, concerts, museums
- Take children to theater
- Almost 3 times as likely to attend Guthrie as Escapists or Homebodies

“Homebodies”
- Less talk, less action
- “Must See TV”
- Very low Guthrie penetration

Active disposition for theater/arts.

OPPORTUNITY TARGET
But there were some differences worth noting

<table>
<thead>
<tr>
<th><strong>Culturals</strong></th>
<th><strong>Frantics</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>More Female (80%)</td>
<td>Half Male</td>
</tr>
<tr>
<td>Higher Income</td>
<td>Workaholics</td>
</tr>
<tr>
<td>Strong Theater Interest</td>
<td>Varied Interests</td>
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<tr>
<td>More Educated</td>
<td>Educated</td>
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<tr>
<td>Skew Slightly Older</td>
<td>Family Leisure Important</td>
</tr>
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</table>
The Guthrie Theater Qualitative Research.
On the surface motivations for attending theater were different

**Culturals**

**Internal**

Theater as life-style

“It’s a mainstay for me. A hitching post.”

Personal

“Emotional stimulation”

On the stage - the connection

**Frantics**

**External**

Theater as life-break

“Freedom. Getting away from it all. That’s what theater is for me.”

Badge value

Been there, done that

Outside the theater - the event
Implication for the Guthrie

Determine if there is a common thread running through the Culturals and Frantics to maximize audience potential.

However, the Guthrie Brand was seen in two different ways.
For Culturals, the Guthrie was a brand with life

• “They were on hiatus and now they are back.”
  • They’ve got momentum.
  • They’ve got energy.
  • They’re a great value.
Patron Development & Sales: 2:30-4pm

For others, Guthrie had lost consideration

“The Guthrie becomes part of your subconscious rather than your conscious. It’s always there so I just don’t think about it.”

- Frantic

They had little/no awareness of a Guthrie makeover.

Guthrie communications weren’t hitting them.

They assumed the Guthrie was priced $15-20 higher than reality.

Their perceptions of the Guthrie were outdated (boring, passionless, intellectual).
In their eyes the Guthrie was “The English Professor”

- **Guthrie**
  - English Professor
    - Classic
    - Cerebral
    - Substance
    - Austere
    - Cadillac

- **Orpheum**
  - Rock Star
    - Pop
    - Big
    - BMW

- **State**
  - Dancer
    - Broadway
    - Style
    - BMW

- **Ordway**
  - Writer
    - Little More Intellectual
    - Fun
    - Mercedes
Implication for the Guthrie

• The Guthrie had restaged at the programming level to become accessible and engaging. Now it had to restage at the brand level and let more people know about it.

• Knowing this, how should The Guthrie be repositioned?
In focus groups, many of the test propositions missed the mark

- Fun and Entertaining
  - undermines specialness of theater
  - too informal
  - lacks soul - Not Guthrie
  - desperate

- Twin Cities Own
  - too removed
  - not newsworthy
  - respectable not motivating

- Heritage
  - not newsworthy
  - what done lately?
  - interesting not compelling
  - role for p.r.

- Lifetime of Learning
  - academic
  - mumsy
  - only part of equation
  - “Too English Lit” - chorelike
Patron Development & Sales: 2:30-4pm

Others had varying degrees of resonance

Professional/High Quality
- one dimensional
- assumptive
- credible
- not emotional

Elegant Evening
- unbelievable for current patrons
- inaccessible for prospects
- elitist
- appreciate specialness

Theater of The People
- in the comfort zone
- welcoming and inclusive
- removed from specialness of theater
- appropriate tone

Inspirational Escape
- highly relatable
- captures busy lifestyle-esp. Frantics
- speaks to emotional connection-esp. Culturals
- encapsulated emotional growth
The Proposition of “Escape” Resonated With Both Culturals And Frantics, Yet In Different Ways.
“Escape” allowed groups to self-complete interpretation

**Culturals**

- Emotional stimulation
- It’s all about the performance
- It’s almost spiritual
- It’s about growing, exploring
- Becoming one with the actors

**Frantics**

- Social Stimulation
- It’s about the whole experience
- Breaking out of everyday routine
- A special evening out
- Dinners, drinks, theater

Escape is the common thread.
And here’s wow they articulated “escape”

- “It’s just how to escape reality for an evening...a great way to unplug...and forget about the humdrum and business and kids...it’s a special night...forget the world and color your world. It’s fairy tales for adults.”
  - Frantic

- “It’s not only an escape, but also a planned purposeful exploration of other cultures and places.”
  - Cultural
Recommended Guthrie positioning

The Guthrie offers a variety of high quality theater that invites its audience to escape the everyday by stimulating their emotions.
How Did This Impact Guthrie Brand Communications?
Guthrie Brand Platform

“Escape”

- Brand Advertising
- Single Ticket Ads
- Direct Mail
- Website
- In Theater Experience
- Public Relations
- Relationship Marketing
- Promotions
Before
After

365 days a year you live in a world of rush hour traffic, junk mail, self-service gas, fast food, voice messaging, convenience stores, artificial sweeteners, bag-it-yourself groceries and disposable styrofoam coffee cups.

Set aside a few evenings for magic.

Guthrie Theater
Joe Dowling, Artistic Director
All work, no plays?

Hurry! Our new More Play, Less Pay packages available until September 30th.

Set aside a few evenings for magic.

Guthrie Theater
Joe Dowling, Artistic Director
Fall under the spell of the Guthrie.

There is no theater in America quite like the Guthrie. The stage seems to reach out to you. The actors are extraordinary.

The passion for inspired story-telling, breathtaking sets and costumes is legendary.

No wonder the Guthrie audience is growing with every joyous production and glowing review.

Join us, we promise laughter, tears and more magic per dollar than just about anywhere else.
Guthrie Theater re-branding results

• In three years:
  • Ticket Revenue up 81% to $8 million
  • Attendance up 50% to 365,000
  • Subscriber base up 79% to 31,700
The ultimate in relevance, engagement and participation marketing: user-generated content

View the Winning Photos

Last week, we invited you to pick the winners of this year's photo contest. The final results are in — view all of this year's winners below!

Thank you to everyone who submitted photos! You can view all of the photo submissions on flickr.

Winners will be contacted through their flickr accounts to notify them of how to claim their prizes.
VOTE FOR TONIGHT'S ENCORE WITH YOUR CELL PHONE!

Text message your vote to:
72648

To vote for:
Bizet: Les Toréadors from Carmen
Text the following message:
NYPHIL 1
(notice the space between NYPHIL and 1)

To vote for:
Rossini: William Tell Overture, excerpt
Text the following message:
NYPHIL 2
(notice the space between NYPHIL and 2)
BROAD-BASED GIVING
Broad-based giving objectives

- The patron comes first: seamless matrix management
- Grow broad-base in terms of both dollars and donors
- Retain donors and incrementally increase their per capita value
- Prepare some portion of them for Governing Membership
<table>
<thead>
<tr>
<th>Activity</th>
<th>Target</th>
<th>Prime Media</th>
<th>Supported By</th>
<th>Message / Offer</th>
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<td>OPENING NIGHT</td>
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<td>2038-39 SUBSCRIPTION ACQUISITION</td>
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<tr>
<td>2039-40 SUBSCRIPTION ACQUISITION</td>
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<td>2040-41 SUBSCRIPTION ACQUISITION</td>
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<td>2041-42 SUBSCRIPTION ACQUISITION</td>
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<td>M/S</td>
<td>Orchestra actors / Grand public / Overture / You are invited to play!</td>
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<td>2042-43 SUBSCRIPTION ACQUISITION</td>
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<td>2047-48 SUBSCRIPTION ACQUISITION</td>
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<td>2050-51 SUBSCRIPTION ACQUISITION</td>
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<td>5</td>
<td>TRUSTEE GIVING</td>
<td>FY 2015</td>
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<td>FY 2017</td>
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**TRUSTEE GIVING**
- **TARGET**: Trustees not given in FY15
- **Letter and Pledge Form**: Phone + Letter and Pledge Form
- **Calendar VI**: Calendar VI
- **Meeting**: Focus at Trustee Meetings
- **Notes**: Devo Comm. With Staff Support

**FY 2015**
- **May**: Trustees not given in FY15
- **June**: Trustees not given in FY15
- **July**: All Unrenewed Trustees for FY16
- **August**: Calendar VI
- **September**: Focus at Trustee Meetings
- **October**: Phone + Letter and Pledge Form
- **November**: Focus at Trustee Meetings
- **December**: Phone + Letter and Pledge Form

**FY 2016**
- **January**: Phone + Letter and Pledge Form
- **February**: Phone + Letter and Pledge Form
- **March**: Phone + Letter and Pledge Form
- **April**: Phone + Letter and Pledge Form
- **May**: Phone + Letter and Pledge Form
- **June**: Phone + Letter and Pledge Form
- **July**: Phone + Letter and Pledge Form
- **August**: Phone + Letter and Pledge Form

**FY 2017**
- **March**: Phone + Letter and Pledge Form
- **April**: Phone + Letter and Pledge Form
- **May**: Phone + Letter and Pledge Form
- **June**: Phone + Letter and Pledge Form
- **July**: Phone + Letter and Pledge Form
- **August**: Phone + Letter and Pledge Form

*Note: jars all Trustee goals*
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**Target:**
- Unemployed and 2-3 Yr Lapsed Donors, Identified Acquisition Targets
- Unemployed and 2-3 Yr Lapsed Donors, Identified Acquisition Targets
- Unemployed 1-2 Yr Lapsed Donors, Identified Acquisition Targets
- Most activity completed
- Acquisition Targets Only

**Solicitation Approach:**
- Phone Calls, Visits, Letters, Emails
- Phone Calls, Visits, Letters, Emails
- Sub-Ask selected
- Phone Calls, Visits, Letters, Emails
- Phone Calls, Visits, Letters, Emails

**Cultivation/Stewardship:**
- In-Home Cultivation Events
- Celebration Event
- In-Home Cultivation Events, State of the Alliance Events
- In-Home Cultivation Events
- In-Home Cultivation Events
- In-Home Cultivation Events

**Solicitor/Notes:**
- Dev. Comm. and Office Staff to Complete Date/Goal Update; Create and Manage Relationships and Management Programs
- Dev. Comm. With Staff Support
- Dev. Comm. With Staff Support
- Dev. Comm. With Staff Support
- Dev. Comm. With Staff Support
- Dev. Comm. With Staff Support

**Notes:**
- May event may be missed
| A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| **Individually BELOW $1,000** | **FY2015** | **FY2016** | **FY2017** | **FY2018** | **FY2019** | **FY2020** |
| **TARGET** | Unrenewed and 1-2-3 Yr Lapsed Donors | PTSS Spring Consort Attendees | Unrenewed and 1-2-3 Yr Lapsed Donors | Unrenewed and 1-2-3 Yr Lapsed Donors | Unrenewed and 1-2-3 Yr Lapsed Donors | Unrenewed and 1-2-3 Yr Lapsed Donors | Unrenewed and 1-2-3 Yr Lapsed Donors | Unrenewed and 1-2-3 Yr Lapsed Donors | Unrenewed and 1-2-3 Yr Lapsed Donors | Current AFIS Donors | Unrenewed and 1-2-3 Yr Lapsed Donors | Unrenewed and 1-2-3 Yr Lapsed Donors | Unrenewed and 1-2-3 Yr Lapsed Donors | Unrenewed and 1-2-3 Yr Lapsed Donors |
| **Solicitation Approach** | Letter and Pledge Form | Letter and Pledge Form | Letter and Pledge Form | Letter and Pledge Form | Letter and Pledge Form | Letter and Pledge Form | Letter and Pledge Form | Letter and Pledge Form | Letter and Pledge Form | Letter and Pledge Form | Letter and Pledge Form | Letter and Pledge Form | Letter and Pledge Form |

**Notes:**
- We need to prep the SS direct mail piece, who can pull the list?
<table>
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<th>Sponsorship</th>
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<th>FY 2016</th>
<th>FY 2017</th>
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<td>TARGET</td>
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<tr>
<td>Unrevealed Sponsors $1,000-$3,999</td>
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<td>Unrevealed and $0.0-$1,000 Year Lapsed Sponsors</td>
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<tr>
<td>Target and Secure Challenge Grant Donor from Identified Base</td>
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<tr>
<td>Renewal / Lapsed upsell on Acquisition</td>
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<tr>
<td>Continue Acquisition for FY15; Solicit Current / Lapsed Sponsors for FY17</td>
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<tr>
<td>Solicitation Approach</td>
<td>Ask to support Spring15 activities</td>
<td>Personal Visits THEN written proposals THEN close</td>
<td></td>
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<tr>
<td>Cultivation / Stewardship</td>
<td>Utilize April Events for Cultivation and Stewardship</td>
<td>Utilize April Events for Cultivation and Stewardship</td>
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<tr>
<td>Solicitor / Notes</td>
<td>Decision: Don Committee could have a Corporate Sub Committee to act as Solicitors</td>
<td>Continue adding and updating new names; Solicit Challenge Grant Donors</td>
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<td>Continue adding and updating new names; Solicit Challenge Grant Donors</td>
<td>Continue adding and updating new names; Solicit Challenge Grant Donors</td>
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Footnote:
1.5.17: Need to develop a list and then decide who will approach.
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| 4 |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
| 5 | Grants and Grp. |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
| 6 | TARGET | Case-By-Case |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
| 7 | Solicitation Approach | Per Guidelines |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
| 8 | Cultivation / Stewardship | Per Guidelines |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
| 9 | Solicitor / Notes |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
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| 12 |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |

- Case-By-Case: Add to the Master Schedule any pre-determined follow-up dates.
- Monitor Master Schedule once per week.
- Quarterly Acquisition / Acquisition Pursuit.
Four-prong broad-based giving

Distribution of $1.1 million

- Direct Mail: 29%
- Telemarketing: 23%
- Community Support: 12%
- Months/Other: 29%
- Subscription Add-on: 36%
Patron Development & Sales: 2:30-4pm

Broad-based giving tools

- Utilize the full array of traditional mechanisms (direct mail, telefunding, subscription asks, etc)

- Develop innovative approaches unique to DSO (CommSuppMonth, Webcasts, patron engagement, box office add-ons)

- Increase frequency and urgency; improve message based on “A Community-Supported Orchestra”
Broad-based giving results

- Dramatic increases in performance in the first three years (58% increase in the # of donors; 56% increase in the gross dollars)

- Reliable conversation of subscribers and single ticket buyers into annual donors

- Moving into incremental growth of program now, with 3% growth targets in the approaching fiscal years
Use sub renewals as a “service”

• Use “sub-ask” to help build a broad base of donors. On the renewal form, if the subscriber...
  • ...gave last year, but not yet this year, ask them to renew at the next higher donor level
  • ...has already given this year, ask them for a flat “program ask” (i.e. $250 for youth concerts)
  • ...has never given, or not in the past two years, ask for 50% of the cost of their season tickets
  • ...is a board member or top giving club member, ask them for a flat program ask

• How?
  • Print a message and the amount on the order form
  • Add the donation into the total
  • Provide an “alternative total” line
  • Pre-write an apology letter
Governing Member Renewal

Renew Your Classical Series
2015-16 Season Tickets

Day/Series  Seat Location  Price
Classical Saturday C  Main Floor Lt Ctr  GG 2  $175
Main Floor Lt Ctr  GG 4  175

$350

1. □ YES! PLEASE RENEW MY CURRENT SEATS AND SERIES TOTAL $______ 350
Or □ CHANGE MY CURRENT SERIES
New Series: 1st Choice _________ 2nd Choice _________
Seating Location: 1st Choice _________ 2nd Choice _________
No. of Seats____ x Price________ TOTAL $______

All seating and series change requests must be submitted online or in writing. If the above change is not possible, we will assign the series and seats that were printed on this invoice. If you have special seating needs, please write on the back of this form.

2. □ I WOULD ALSO LIKE TO ORDER THE FOLLOWING DSO PRESENTS AND OTHER CLASSICAL CONCERTS
Event/Date  Time  Section  No. of Seats  X  Price/Ticket

$______ $______

3. □ PREPAID PARKING — Not available for Coffee concerts
No. of concerts in series _______ x $5.00 = TOTAL $______ 45

4. □ 2015 ANNUAL FUND CONTRIBUTION
Thank you for your support of the Annual Fund as a Governing Member.
Renewing your gift early will help the DSO reach people throughout the community with live community-supported performances in a variety of settings across metro Detroit. Thank you!

$______ 4,000

Include an Annual Fund gift at or above the amount listed with this order and all fees are waived. Thank you!

HANDLING FEE $______ Waived
PER SEAT FEE (No. of seats x $2) $______ Waived

GRAND TOTAL $______ 4,395

5. CHECK THE MOST CONVENIENT PAYMENT TYPE
□ Enclosed is a check made payable to the DSO. (Please write your patron number on the check)
□ Charge my full payment to: □ MasterCard  □ VISA  □ American Express  □ Discover

Card No.__________  Exp. Date__________
Signature_____________________________  CVV2 Code:__________________

Print Name_____________________________

I DO NOT WISH TO RENEW, PLEASE CANCEL MY SUBSCRIPTION
What is the primary reason?__________________________
Renew Your Classical Series
2015-16 Season Tickets

1. ☐ YES! PLEASE RENEW MY CURRENT SEATS AND SERIES
   TOTAL $1,400
   OR ☐ CHANGE MY CURRENT SERIES
   New Series: 1st Choice _________ 2nd Choice _________
   Seating Location: 1st Choice _________ 2nd Choice _________
   No. of Seats _________ x Price _________ TOTAL $_________

   All seating and series change requests must be submitted online or in writing. If the above change is not possible, we will assign the series and seats that were printed on this invoice. If you have special seating needs, please write back on this form.

2. ☐ I WOULD ALSO LIKE TO ORDER THE FOLLOWING DSO PRESENTS
   AND OTHER CLASSICAL CONCERTS
   Event/Date _________ Time _________ Section _________ No. of Seats _________ X.Price/ Ticket _________ $_________ $_________

3. ☐ PREPAID PARKING — Not available for Coffee concerts
   No. of concerts in series _________ 9 x $5.00 = TOTAL $45

4. ☐ 2015 ANNUAL FUND CONTRIBUTION
   Thank you for your support of the Annual Fund this season as a Governing Member. Your additional gift now can provide you with more great benefits while you help the DSO reach people throughout the community with live community-supported performances in a variety of settings across metro Detroit. Thank you!
   $1,000
   Include an Annual Fund gift at or above the amount listed with this order and all fees are waived. Thank you!
   HANDLING FEE $_________ Waived
   PER SEAT FEE (No. of seats x $2) $_________ Waived
   GRAND TOTAL $2,445

5. CHECK THE MOST CONVENIENT PAYMENT TYPE
   ☐ Enclosed is a check made payable to the DSO. (Please write your patron number on the check)
   ☐ Charge my full payment to: □ MasterCard □ VISA □ American Express □ Discover
   Card No. ___________ Exp. Date ___________
   Signature ___________ CVV2 Code ___________
   Please review the seat and series information representing the subscription you held last season. Note the deadline date for renewal. After that date we cannot guarantee seats as listed above.

Renewal Deadline: March 13, 2015
Patron ID: 2457
Mrs. Sheila Mondry
27275 Wellington Rd
Franklin, MI 48025-1330
(248) 851-4430

Confirmations are sent by email. If the email address below is not correct or blank please fill in your current email address:
tracy@mgroupphinc.com

The easiest way to renew is by visiting dso.org/classical with the email address listed above.

Page 227
4333
Non donor/27.5% of ticket price

Renew Your Classical Series 2012-13 Season Tickets

<table>
<thead>
<tr>
<th>Day/Series</th>
<th>Seat Location</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classical Music Lover's</td>
<td>Main Floor A 16</td>
<td>$800.00</td>
</tr>
<tr>
<td>Classical Music Lover's</td>
<td>Main Floor A 18</td>
<td>$800.00</td>
</tr>
</tbody>
</table>

1. □ YES! PLEASE RENEW MY CURRENT SEATS AND SERIES
   TOTAL $1,600.00

Or □ CHANGE MY CURRENT SERIES
   New Section:
   1st Choice
   2nd Choice
   Seating Location:
   1st Choice
   2nd Choice
   No. of Seats x Price
   TOTAL $______

All seating and series change requests must be submitted in writing.

If the above change is not possible, we will assign the series and seats that were printed on this invoice.

If you have special seating needs, please write on the back of this form.

2. □ I WOULD ALSO LIKE TO ORDER THE FOLLOWING SPECIAL EVENTS
   Event/Date  Time  Section  No. of Seats  X Price/Ticket
   $______

3. □ PREPAID PARKING (FULL SERIES ONLY) Not available for Coffee concerts
   No. of concerts in series 20 x $5.00 = TOTAL $100

4. □ I DO NOT WISH TO RENEW, PLEASE CANCEL MY SUBSCRIPTION
   What is the primary reason:
   _______________________________

5. □ 2012 ANNUAL FUND CONTRIBUTION
   Thank you for your support of the Annual Fund this season. Your additional gift now will help the Detroit Symphony touch and transform lives of every age and background through live community-supported performances at The Max and in a variety of settings across metro Detroit. Thank you!
   $440

Include an Annual Fund gift at or above the amount listed with this order and all fees are waived. Thank you!

Handling Fee $______
Per Seat Fee $______
Grand Total $2147

5. CHECK THE MOST CONVENIENT PAYMENT TYPE
   □ Enclosed is a check made payable to the DSO. (Please write your patron number on the check)
   □ Charge my full payment: □ Visa □ Master Card □ American Express □ Discover
   Card No. ___________________________ Exp. Date ___________________________
   Signature ___________________________ CVV2 Code: _______________________
   Print Name ___________________________

Please return this form with your payment.

Renewal Deadline: MARCH 16, 2012
$1,600.00

Please review your contact information carefully and make any necessary changes.
Subscriber Number: 156746
Mt. Max Lepler
509 Lloyd Ave
Royal Oak, MI 48073-4012
248-588-5641

Confiramations are sent by email. If the email address below is not correct or blank please fill in your current email address:
carines@wideopenwest.com
(restricted for DSO use only)

Please review the seat and series information representing the subscription you held last season. Note the deadline date for renewal. After that date we cannot guarantee seats as listed above. Please refer to your subscription letter for more information regarding your seats and seats.

Please note the date of the first concert in your series. Your tickets will be mailed approximately three weeks prior to that date.

The easiest way to renew is by calling Sharon Gardner Carr at 313-576-5119. You can also renew by FAX at (313) 576-5101, in person or by mail at the Detroit Symphony Orchestra Box Office, 3711 Woodward Ave., Detroit, MI 48201 MTF 9-5, W Th 12-7, Sa 12-4 or online at www.dso.org/renew
Community support months

• First-ever: twice yearly, in concert-hall “pledge drives”

• Dedicated Community Support Month webpage, which will feature video, more info on how to give, and how to spread the word
  • Community Support Month Video

• A custom "I Gave to the DSO" badge people easily can put on the twitter and Facebook profile pictures

• Whenever someone adds it to their page, it also posts instructions on their wall on how to give via text or web:
  • I Gave to the DSO
Community support months

• **Results:**
  • In three years, six CSM’s held
  • Over $6 million in gifts and pledges recorded
  • From approximately 6,000 donors
  • Part of the formula which has earned a 100% increase in the number of gifts to the Annual Fund in two years
  • Grown the ratio of subscriber/donors from the low 25% range to nearly 50%
Seminar assignment

• **Practical Development Ideas for Your Orchestra**

Conceive three, significant steps you would consider taking to modify your patron development & sales approach at your orchestra

1. ____________________________________________________________
2. ____________________________________________________________
3. ____________________________________________________________

Of these three points, what is a first step you can take to head in a new direction?

1. ____________________________________________________________
BREAK
Patron Advancement 4:15-5:45pm

Transactional bell curve

- Identification of Donor by Organization
- Qualification
- Strategy Development
- Cultivation
- Solicitation
- Acknowledgement
- Recognition
- Donor Data Maintenance

Credit:
High Impact Philanthropy
Kay Sprinkel Grace, Alan Wendroff
Orchestra fundraising 201

The 3-way test to assess your fundraising prowess
Orchestra fundraising 201

- Killer Keys to a Kornucopia of Kfundraising

$S^3$

Structure, Sequence, and Strategy
An achievement structure is key
An achievement structure is key
Use an accountability sequence

- Board Chair
- Vice Chair
  - Patron and Community Engagement
  - Annual Fund Board Campaign Chair Committee
  - Annual Fund Giving Club Campaign Chair Committee
  - Annual Fund Foundation Campaign Chair Committee
  - Annual Fund Corporate Campaign Chair Committee
Deploy staff to mirror Board roles

- President/CEO
  - Director of Development
    - Exec Dir = Board Campaign
      - Dev Dir = Other Inst Support
    - Dev Dir = Major Gifts
    - Exec Dir = Major Corp Support
      - Dev Dir = Broad-based individual support
      - Dev Dir = Gift Entry/Acknowledgements
    - Dev Dir = Business Campaign
    - Exec Dir = Major Foundation & Gvt Support
      - Dev Dir = Event Coordination
Build on proven strategies

- Successful orchestra annual campaigns are built on a very few prevailing building blocks and grow as the result of proven strategies.
#1 Strategic realities

Successful orchestra annual campaigns are built acknowledging a few prevailing strategic realities:

- Board personal giving
- Classical ticket buyers
- Reluctant Volunteers
- Acts of leadership
- Time
- Patron Advancement's function
- Appeal schemes
- Volunteer-centered
- Audiences
- New, creative approaches
#2 Ubiquosity

Patron Advancement 4:15-5:45pm

Detroit Symphony Orchestra
Leonard Slatkin Music Director
A Community-Supported Orchestra
#2 Ubiquosity

**Investing in our Future**

1,300 students in 28 ensembles

**November is Community Support Month**

Make an Annual Fund gift today at dso.org/donate
More than 85 of the world’s best musicians

November is Community Support Month

Make an Annual Fund gift today at dso.org/donate
LET’S BUILD A COMMUNITY!
Make an Annual Fund Gift today
#3 Reach Board goal in first month

- Achieve personal giving from Board members between 18-20% of the annual fund campaign, defined as the total of:
  
  - Board giving + All other individual giving + Corporate support + Foundation giving + Government grants
#4 Breath life into voting members

Governing Members

Make an exceptional impact. Earn extraordinary benefits.

The DSO Governing Members comprise a philanthropic leadership group designed to provide unique, substantive, hands-on opportunities for leadership, influence and access to a diverse group of valued stakeholders. Governing Members are ambassadors for the DSO and advocates for Arts and Culture in Detroit and throughout Southeast Michigan. This dynamic group offers support and counsel to the DSO Board of Directors.

Did you know? Governing Members get all ticketing fees waived for all online purchases! Log in now to begin.

Governing Members enjoy unparalleled access to DSO artists and senior leadership; a variety of custom, experience-based events; exclusive travel opportunities; invitations to serve on institutional task forces and committees; and much more. A minimum commitment of $2,500 annually must be contributed to the DSO Annual Fund; subscription to one or more concert series is expected.

Governing Members also receive patron recognition equal to their level of giving. Click here to view the patron recognition levels.

For more information regarding the DSO Governing Members please contact the Office of Patron Advancement at 313.576.5400.

Governing Members Leadership

James C. Farnan, Chairperson | Read the Chairperson’s letter
Arthur T. O’Reilly, Immediate Past Chair
Frederick J. Morris, Jr., Member at Large
Bonnie Larson, Member at Large
Maureen D’Avanzo, Vice Chair, Outreach & Recruitment
Janice Bernick, Vice Chair, Philanthropy & Stewardship
Rebecca O’Reilly, Vice Chair, Signature Events
#5 Form a corporate council

- Establish an “Institutional Support Council”

**PROGRAM:** Institutional Support Council

**STATUS:** Meets quarterly in person

**COUNCIL ROLE:**
Receive, review, ratify, and help realize an annual plan to meet and exceed annual revenue goals from institutional sources, primarily corporate sponsorships; Serves at the pleasure of the Board Chairman and in conjunction with the Annual Fund Chair

**LEADERSHIP:**
Co-chairs, representing area corporations
#6 Out-report Wall Street

- Report, report, report
  - Daily gift reports
  - Weekly campaign reports
  - 48-hour gift acknowledgement
Please see below for all gifts entered today over $1,000 for FY12. Please see the attached spreadsheet for all gifts entered today for FY12.

### FY12 Gifts

<table>
<thead>
<tr>
<th>REID</th>
<th>Name</th>
<th>Constituency</th>
<th>Gift Amount</th>
<th>Gift Type</th>
<th>Gift Date</th>
<th>Total FY12 Giving</th>
<th>Total FY11 Giving</th>
<th>Net Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>44332</td>
<td>Barbara Van Dusen</td>
<td>Board Member</td>
<td>$70,840.00</td>
<td>Stock/Property</td>
<td>4/2/2012</td>
<td>$170,840.00</td>
<td>$160,656.25</td>
<td>$10,163.75</td>
</tr>
<tr>
<td>45562</td>
<td>Marianne Endicott</td>
<td>Board Member</td>
<td>$15,436.90</td>
<td>Stock/Property</td>
<td>12/19/2011</td>
<td>$15,436.90</td>
<td>$15,091.56</td>
<td>$345.34</td>
</tr>
<tr>
<td>12820</td>
<td>Moroun Family</td>
<td>Foundation</td>
<td>$15,000.00</td>
<td>Cash</td>
<td>4/10/2012</td>
<td>$30,000.00</td>
<td>$0.00</td>
<td>$30,000.00</td>
</tr>
<tr>
<td>44792</td>
<td>Philip Campbell</td>
<td>Individual</td>
<td>$3,200.00</td>
<td>Cash</td>
<td>4/10/2012</td>
<td>$3,200.00</td>
<td>$0.00</td>
<td>$3,200.00</td>
</tr>
<tr>
<td>175212</td>
<td>Paul Tomboulian</td>
<td>Individual</td>
<td>$3,000.00</td>
<td>Cash</td>
<td>4/4/2012</td>
<td>$3,000.00</td>
<td>$3,750.00</td>
<td>($750.00)</td>
</tr>
<tr>
<td>41070</td>
<td>Anne Bielawski</td>
<td>Individual</td>
<td>$2,500.00</td>
<td>Cash</td>
<td>4/10/2012</td>
<td>$2,500.00</td>
<td>$4,088.60</td>
<td>($1,588.60)</td>
</tr>
</tbody>
</table>

### FY12 Pledges

<table>
<thead>
<tr>
<th>REID</th>
<th>Name</th>
<th>Constituency</th>
<th>Gift Amount</th>
<th>Gift Type</th>
<th>Gift Date</th>
<th>Total FY12 Giving</th>
<th>Total FY11 Giving</th>
<th>Net Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>112100</td>
<td>State of Michigan</td>
<td>Government</td>
<td>$20,000.00</td>
<td>Pledge</td>
<td>1/26/2012</td>
<td>$20,000.00</td>
<td>$20,000.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>117984</td>
<td>Randall L Harbour</td>
<td>Individual</td>
<td>$3,000.00</td>
<td>Pledge</td>
<td>4/10/2012</td>
<td>$3,000.00</td>
<td>$3,000.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>
## Patron Advancement 4:15-5:45pm

### Case & point: weekly report

<table>
<thead>
<tr>
<th></th>
<th>FY 2015 YEAR-TO-DATE</th>
<th>FY 2014 YEAR-TO-DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>SINCE LAST REPORT</td>
<td># OF DONORS</td>
</tr>
<tr>
<td><strong>INDIVIDUALS</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Directors and Trustees</td>
<td>$19,500</td>
<td>92</td>
</tr>
<tr>
<td>Gabrilowitsch Society GovMems</td>
<td>$0</td>
<td>28</td>
</tr>
<tr>
<td>Governing Members</td>
<td>$7,000</td>
<td>182</td>
</tr>
<tr>
<td>Community Ensembles</td>
<td>$16,798</td>
<td>5,298</td>
</tr>
<tr>
<td>Subtotal</td>
<td>$43,298</td>
<td>5,600</td>
</tr>
<tr>
<td><strong>INSTITUTIONS</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Corporate</td>
<td>$0</td>
<td>25</td>
</tr>
<tr>
<td>Foundations</td>
<td>$15,000</td>
<td>25</td>
</tr>
<tr>
<td>Government</td>
<td>$0</td>
<td>2</td>
</tr>
<tr>
<td>Subtotal</td>
<td>$15,000</td>
<td>52</td>
</tr>
<tr>
<td>TOTAL ANNUAL FUND</td>
<td>$58,298</td>
<td>5,652</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>FY 2015 YEAR-TO-DATE</th>
<th>FY 2014 YEAR-TO-DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>SINCE LAST REPORT</td>
<td># OF DONATIONS</td>
</tr>
<tr>
<td><strong>PROJECT SUPPORT</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Special Events</td>
<td>$95,575</td>
<td>464</td>
</tr>
<tr>
<td>Venture Fund</td>
<td>$3,640</td>
<td>1,075</td>
</tr>
<tr>
<td>Volunteer Council</td>
<td>$1,830</td>
<td>715</td>
</tr>
<tr>
<td>TOTAL PROJECT SUPPORT</td>
<td>$101,045</td>
<td>2,254</td>
</tr>
<tr>
<td><strong>GRAND TOTAL</strong></td>
<td>$159,343</td>
<td>7,906</td>
</tr>
</tbody>
</table>
#7 Overcome weaknesses

- Orchestra annual campaigns inevitably reveal underlying institutional weaknesses which, in the end, are anchors which prevent full achievement
  - Weak __________, unclear __________, uncertain __________
  - Weak __________, with unclear __________ and fuzzy __________
  - Over-, under-, mis- exposure of our __________ __________
  - Unclear shared __________ or insufficient __________ among volunteers and staff
  - Obsession over __________
  - Disconnection between __________, board __________, and executive office
  - Better __________________________than Friday afternoon __________
  - Failure to __________ new __________ __________ into key __________ roles __________ in the __________.
#8 Plan for successful solicitations

Getting to and making the ask

Pursue ___________ _____________

Send ___ _____________ _____________

Send ___ _____________ _____________ at the _____________ _____________

Send ___ _____________ _____________ at the _____________ _____________ and ask for the _____________ _____________

Send ___ _____________ _____________ at the _____________ _____________ and ask for the _____________ _____________ for the _____________ _____________

Develop a _____________ _____________

____________

Script the ____________________________

____________________________________

• Be clear about your _________:
  ___________ _____________
  ___________ _____________ and _________

• ___________ more than _____________

• Ask for a _____________ _____________
#9 Try Paul’s phive premises

- 5 Ways to engage a prospective donor
  - 1
  - 2
  - 3
  - 4
  - 5
BONUS TRACKS

bo·nus [ˈbɒnəs]  track [træk]  (plural tracks) nouns

Definition: unexpected extra thought: an extra unexpected advantage, line of thought or investigation, or a course of action
Habits of a successful fundraiser

- Accept
- Discover
- Decide
- Admit
- Create
- Learn
- Always
- Be
Patron Advancement 4:15-5:45pm

Great & memorable events

- Insider Evenings
- On-Stage Rehearsals
- Annual (meeting) Dinner
- Patron Tours
- Season Preview Luncheon
- Musician (anniversary) Luncheon
- Post-Concert “Cast” or “Afterglow” Parties
- Planned Giving Society functions.
Low-margin activities

- On-line __________/ “e” __________
- Pursuing __________  __________without a truly unique program
- Stuffing __________  __________ with donation envelopes
- Mistaking __________  __________and large-group speeches for fundraising
- Allowing __________ and __________to masquerade as relationship building or “outreach”
- __________raising
- We need __________  __________
Patron Advancement 4:15-5:45pm

Potpourri

- The annual fund is not ________________________________
  ________________________________

- Great Executive Directors and Development Officers...
  - ...authentically ____________ ____________
  - ...comfortably make the ____________ appear ____________
  - ...are exceptional ____________ and ____________

- ____________ is not a ____________.
BUILDING A KILLER BOARD

bild·ding [bónding] killer [kil·er] (plural killers) nouns

Definition: groups possible of the extraordinary: an extra unexpected advantage, line of thought or investigation, or a course of action
Confusion about board role

- As non-profit governance has been studied and practiced over the past twenty years, it is now commonly accepted that non-profit success is grounded in effective governance.

  - Effective governance is the key to your orchestra’s future.

  - Those who sit on [non-profit] boards must ask:
    - “What is a responsible board supposed to do in times like these?”
2 dimensions of board service

**Governance Dimension**
- Governance
  - Oversee/Evaluate
  - Review/Monitor
- Leadership
  - In partnership with lead staffer and staff team, guide the mission and direction
- Stewardship
  - Ensure dedication to, and use of assets for, benefit of the public

**Direct Service Dimension**
- Working Board
  - Hire/support/evaluate/discharge lead staffer
  - Review/approve annual budget
  - Review/approve major decisions, commitments, and plans including expenditures, loans, and leases
  - Evaluate progress toward program and financial goals
- Fundraise
- Planning & visioning
- Public and Community Relations
- Financial oversight
The New Work of the Non-Profit Board

Richard Chait, Thomas Holland, and Barbara Taylor: 1996

Taylor, Chait, and Holland contended that board members needed to discover the “new work of the board,” noting that “new work is another term for work that matters”:

- New work defies the conventions that have regulated past board behavior

- Traditional non-profit board work: limited to scrutinizing staff

- New non-profit board work: requires new rules of engagement and unorthodox ways of fulfilling a board’s responsibilities

- The pressures on non-profits today are too great for the old model to suffice
They suggested 3 ways for Board members to focus on what really matters:

1. **Find out** what matters
   - make the lead staffer paint the big picture; get acquainted with key stakeholders; read and talk to experts in the field

2. **Act on** what matters
   - become involved not only in setting policy but in implementing the parts of that policy that really matter

3. **Focus meetings** on what matters
   - avoid discussion of anything the staff can and should do on their own; spend sufficient time on the real issues facing the organization

Perhaps most helpful of all the insights offered was their comparative description of the old work and the new work...
The New Work of the Non-Profit Board

Richard Chait, Thomas Holland, and Barbara Taylor: 1996

Old Work

1. Staff identifies problems, proposes solutions
2. Board approves and monitors
3. Board sets policy, staff implements policy; sharp borders; little or no border traffic
4. Permanent committees parallel administrative functions
5. Board meetings are process-driven; protocol does not vary; emphasis on reports
6. Board is a collection of stars with expertise and status; lead staffer has individual relationships

New Work

1. Board/staff discover issues that matter, set agenda, and solve problems together
2. Board and staff set and implement policy. Lines blurred; borders open
3. Ad hoc task forces are tied to strategic priorities; premium on flexibility
4. Board meetings vary with circumstances; emphasis on participation and action
5. Board is a constellation; functions as team

Four tests of effective governance

Paul Hogle: 2007

• **The Purpose Test** -- do we have a clear, persuasive, and widely-accepted mission statement which guides both our strategic and tactical decision making

• **The People Test** -- do we have sufficient numbers of the “right” people recruited, oriented, mentored, and engaged in pursuit of the mission

• **The Structure Test** -- are we organized in such a way to allow trustees to roll up their sleeves and do meaningful work, in interaction with the staff, on behalf of the organization

• **The Role Test** -- in general, would trustees describe themselves as fully engaged and strategically deployed in a value-adding role
Ideal board members

Four Work Streams

Four Roles
A checklist for high results, non-profit Boards

Roles of an Ideal Member
a guide to identifying and measuring qualities

✓ Members of the Board of Directors are the chief guardians of the institution on behalf of the community. Collectively, the Board is a unified group of high-level decision makers with the authority to act on the Corporation’s behalf.
A checklist for high results, non-profit Boards

Roles of an Ideal Member
a guide to identifying and measuring qualities

✓ The Board establishes parameters, goals, and direction in pursuit of the mission and closely partners with the lead staff member to ensure effective management of the organization
A checklist for high results, non-profit Boards

Roles of an Ideal Member
a guide to identifying and measuring qualities

✓ The Board is **held highly accountable** to the organization’s voting members, constituents, supporters, donors, families, and the general public
A checklist for high results, non-profit Boards

Roles of an Ideal Member
a guide to identifying and measuring qualities

✓ Individually, Directors are responsible for clearly articulating the mission, accomplishments, and goals to the public and actively garnering support from the community
Roles of an ideal member

- **Chief guardians**
  - Establishes parameters, goals & direction
- **Held highly accountable**
- **Clearly articulating mission, accomplishments & goals**
Ideal board members

Four Work Streams

Four Roles

Ideal Board Member
A checklist for high results, non-profit Boards

**Work Streams of an Ideal Member**

a guide to identifying and measuring qualities

- Although each Director possesses unique capabilities for institutional advancement, there are four fundamental work streams that members of the Board must fulfill
A checklist for high results, non-profit Boards

Work Streams of an Ideal Member
a guide to identifying and measuring qualities

• Passionate and demonstrably active belief in the mission, vision and values

• Job one of successfully serving on the Board is possessing and acting on an intellectual and emotional alignment with the institution’s strategic direction as expressed by the Mission, Vision, and Values
A checklist for high results, non-profit Boards

Work Streams of an Ideal Member
a guide to identifying and measuring qualities

- Resource provision and generation
  - One of the fundamental responsibilities of any nonprofit Board is to ensure significant financial resources. Every Board member will be asked to provide and secure adequate resources required to fulfill the mission
A checklist for high results, non-profit Boards

Work Streams of an Ideal Member
a guide to identifying and measuring qualities

- Advocacy, engagement, and connections
  - Board members that embody these qualities are champions on behalf of the institution, and will connect the organization across the fabric of the community’s business, social, neighborhood, educational, or political communities
A checklist for high results, non-profit Boards

**Work Streams of an Ideal Member**

a guide to identifying and measuring qualities

- Vision and strategy
  - A board member must be able to think on behalf your institution in the context of your vision, strategy, and resources (asset optimization)
Work streams of an ideal member

- Belief in the mission
- Resource provision & generation
- Advocacy, engagement, & connections
- Vision & strategy
Conclusion

• As non-profit governance has been studied and practiced over the past 25 years, thoughtful commentators, consultants, administrators, and trustees have increasingly come to accept the notion that management and governance are not so easily compartmentalized or separated.

• It is far too simple to think of governance as policy-making and management as profit-making. That, of course, underscores the fundamental importance of a close collaborative working relationship between and among the board, the staff, and artists/educators.

• We must figure out where we want to go, how we want to get there, how to remove the barriers in our path, and how to accomplish our mission... together.
Seminars advancement assignment

- **Practical Advancement Ideas for Your Orchestra**

  - Conceive three, significant steps you might consider taking in implementing or modifying your fundraising
  1. 
  2. 
  3. 

  - Name one person on your Board who is significantly under-deployed. Might they be your next (first) annual fund chair?
  1. 

  - For the points above, what are the first few steps required of you to head in a new direction?
  1. 
  2. 

*LAO: 2015 Version: 5/23/15*
5:45-5:50pm

HOMEWORK & ADJOURNMENT
Homework

• Consider a business you frequent – a club, a store, an airline, etc.
  • Think about the reasons you do business with them
  • Now, consider the systems, training, and culture required to execute those reasons consistently

• Describe the business in detail, the reasons for and the “systems” they use to earn and foster your loyalty

• 5:50pm – Q & A

• 6 pm -- Adjourn for Day
WEDNESDAY, MAY 27, 2015
PATRON LOYALTY & ENGAGEMENT PROGRAMS

an intentional program of preferential experiences, service, and access through “personalized, one-to-many methods”
COULD A **GREATER MIRACLE** TAKE PLACE THAN FOR US TO LOOK THROUGH EACH OTHERS’ EYES FOR AN INSTANT?
ABOUT NIKE, INC.

NIKE, Inc. is the world’s leading innovator in athletic footwear, apparel, equipment and accessories.

OUR MISSION:
TO BRING INSPIRATION AND INNOVATION TO EVERY ATHLETE* IN THE WORLD

*IF YOU HAVE A BODY, YOU ARE AN ATHLETE
Patron Loyalty & Engagement Program: 8–9am

Dove 1957 – 2002

A classic ‘50s brand

“One third moisturizing cream”

Claim of functional superiority with expert endorsement by dermatologists and scientific evidence to back moisturizing claims
Patron Loyalty & Engagement Program: 8–9am

Dove: a brand with a point of view
“Purpose-driven organizations have a huge competitive advantage. Employees and customers are hungry for purpose.”

-- Rich Karlgaard, Publisher, Forbes
Meanwhile, our Executive Directors are saying. . .

“We want to convince people before they walk into the theater that we are great entertainment; once they’ve experienced a show, they’ll know that.”

“I don’t think I’ve actually thought about positioning our artistic product to the consumer. I’ve been concerned with getting people to our concerts and having some name recognition.”

“The artistic director really doesn’t have a role in audience development and her choices are not affected by the audience at all when planning our concerts. And now as I write this, I see there may be a problem here.”
Homework exercise

- **Your Loyalty Program Experiences**
  - At your tables, briefly discuss your ideas
  - Decide which one might be the most interesting.
  - Report-out to everyone one idea per table
Patron Loyalty & Engagement Program: 8–9am

Loyalty marketing impacts

LSO Season 2012/13
Concert Guide
featuring the LSO’s family of artists

A triumph... it was all so vivid. ★★★★★

Richard Morrison, The Times

Box Office
020 7638 8891
lso.co.uk
Patron Loyalty & Engagement Program: 8–9am

Loyalty marketing impacts
Patron Loyalty & Engagement Program: 8–9am

Loyalty marketing impacts
Loyalty marketing impacts
Patron loyalty & engagement programs

• For the remainder of morning, we’re going to explore, then you’re going to build:
  • One practical strategy for developing a *loyal* patron base
Churn missed something: the relationship

- PGI found quality of relationship highly correlated with both attendance and donations

- To develop a sustaining base of support from patrons, it’s about more than discounting

- Many orchestras are now focusing on creating stronger relationships from the very beginning, in order to increase repeat purchase and motivate greater giving
Patron perceptions of relationship with orchestra

- Deserves my support: 15%
- Needs my support: 11%
- Plays what I like: 9%
- Is responsive to my needs: 6%
- Does more for me than I do for them: 11%

- Feel like an outsider: 52%*
- Only cares about my money: 40%*
- Don’t feel like they know me at all: 65%*

*Top two box
Brand relationship factors

- The Study found interesting correlations between brand relationship and patron level:
  
  - Respect: No correlation with giving or attendance. “Because I respect you doesn’t mean I love you”
  
  - Feelings of Care and Reciprocity: High correlation
  
  - Feelings of Closeness: High correlation
Case Study

AN OUT-OF-THE-BOX LOYALTY PROGRAM
Harley = the brotherhood

Because it’s a great day to ride.

Because we’re out there together.

Because Mondays usually suck.

Because a million miles can bring us together.
Actively engineering & enabling connections

- Consumer ↔ Product
- Consumer ↔ Brand
- Consumer ↔ Consumer
- Consumer ↔ Category

Goal is to create fierce, unwavering loyalty and commitment that becomes a source of competitive advantage and sustains through good times and bad.
“I don’t know about those Hondas and those Kawasaki guys, but we don’t leave a man behind. Never. And that’s what Harley’s all about.”

— Kemp, a Harley Owner
• “I know it’s a corporation, but for a lot of us it’s inside us – it’s part of our bodies.”

— Charlie St. Clair, Executive Director, Laconia NH Bike Rally
When Did It Start For You?
Deepen the “Family” Bond, One Rider at a Time

“Proud to be part of such a large family who all share the same passions ....”

“When you are in Milwaukee, come by to shake my hand.”

“I am so close to my customer we sleep and shower together. I am not sure many companies can top that.”
Calls Made: 112,570
Letters Written: 4,300
Staff Mileage: 446,537
Overnights: 266,897
Member Interactions: 447,101
Events Attended: 150
Exec Participation: 133
Enable the Legacy and Brand Culture

As a member of the H.O.G. Posse, I'm sworn to the following:

While on the trail, I will always look out for fellow Posse riders. I will never trailer, and never whine about the food, weather, schedule, or directions.

I solemnly swear to love, honor, and cherish my motorcycle, to share my troubles with fellow Posse riders but keep my beers to myself, and to visit the Posse Mercantile on a daily basis. I promise to live as a Posse rider, to laugh at rain, shout back at thunder, eat bugs, sleep in the dirt, and not bathe for two weeks. I will honor all the rules of common decency, honesty, and chivalry, or I may be asked to leave. And finally, I will always have fun.

Those in accord with this Official Posse Oath, signify your allegiance with the words, “Hell yes.”
Rider Creeds

Submit by Randy Friend, Danvers, MN

It's never about who you are or where you are at in life, it's about the ride and the destination.

Submit by Jeff and Kerrie, Oklahoma City, OK

We ride. That's what we do. If it's warm enough for our Road King to start, that's a sign from God that we should ride. Riding is our passion; it heals us, it centers us, it simultaneously calms us down and stirs our souls. We hear the V-Twin engine, the road, and the towns we ride through. We feel the presence of riders who have traveled before us, riders we meet at runs and rallies, and we see tomorrow's riders as the children of our Brothers and Sisters out on the road. We smell like leather, bleed Harley oil, and dream of chrome. And we wouldn't have it any other way.

Submit by Steve C, Singapore, Asia

I believe that the term "it's not the destination that's important, it's the journey" was coined specifically for H-D riders!

Submit by Paul [Highweeds], Carlisle, OH

I believe I should always be there for my Brothers and Sisters of the Road, That I have the right to my Freedoms and choices, GOD, Family, and my Road King. I believe that our machines were made to ride, close, far, and forever. When I cannot handle two wheels, I will go to three, but I WILL RIDE! That is my Creed.

Submit by Edward S. Beattie, Tucson, AZ

I believe that opportunities come and go, and that life is too short to keep letting them pass by. I believe that from the ashes, something better can rise up. I believe that second chances are not just one more opportunity to let it go to waste. I believe that my life has a new path on my journey, and
The Harley-Davidson Museum
Engineer Experiences to Connect with the Brand Heritage, and with Others
Hey, Stella!
A Cautionary Tale of Temptation, Rejection, and Redemption

Owner: Guy A. Thomas of Manchester Center, Vermont
Motorcycle: 2002 Road King®

My Harley® 2002 fuel-injected Road King® was purchased new from Brunswick Harley®-Davidson® in Troy, New York in May 2002. She has a Screamin' Eagle® Street Legal Big Bore Stage II Kit upgrade and her name is Stella, which stands for "sterling performance."

Right from the start she and I made some big journeys: up to Canada; down to Washington, D.C.; and out to Pennsylvania. We took lots of trips into the high peaks of the Adirondack Mountains in New York. We climbed to the top of Mt. Washington (more than 6,200 feet) and other summits in the White Mountains of New Hampshire, and went to Laccoria Bike Week. Stella always ran great and looked sharp.

In early June 2003, I went into the dealership for a routine service appointment. While I was waiting in the showroom floor, I came across a red 10th Anniversary Fat Boy®. It was low and sleek, and I began to think maybe this bike could be mine. One thing led to the next, and before I left the sofa, the papers were signed and the deal was done. I sold Stella out with only 28,416 miles on her. I succumbed to the charms of the newer, younger Fat Boy, and I was taking delivery the very next day.

That afternoon I rode Stella home and began to think about what I did. Stella wasn't as pretty as the Fat Boy, but she still looked great and was ready to run 500 miles on demand — never a complaint and never a failure. I realized she and I already had a history together, and I started to have some serious misgivings about what was about to happen.

The next day I rode Stella to the dealership. As I drove into the lot, there was the new Fat Boy — gleaming red and looking very hot. With all the paperwork done and my final goodbye to Stella said, I was ready to roll out on my new motorcycle. As I sped off, I looked over at Stella. Her license plate was gone, and she stood alone in the parking lot. It was at that very moment, a moment in time I will never forget, I realized I just made a big mistake. I yielded in a weak moment and sold out to my faithful friend. What had I done?

I was sad and I rode home. Not that there was anything wrong with the Fat Boy. It was gorgeous, and it ran like a champ, but it didn't have the same appeal to me.

Two weeks later I went back to the dealership for the 1,000-mile service. As I entered, there sat Stella on the showroom floor, a "For Sale" sign hanging from her handlebar. I walked over with sadness in my heart and listened to a young couple ridicule her. "Who's going to buy a bike with 28,000 miles?" I quickly came to her defense. I told them how much I loved her and not to rush to judgment. She was a great motorcycle with many more miles left in her, and her name was Stella.

As I left that afternoon, I realized my error. I realized it was too soon to put my pride in my pocket and buy Stella tomorrow. I knew I would take a financial loss on the Fat Boy, but I didn't care. I wanted Stella back.

That next day I returned, ready to reunite with Stella, but she was gone sold to someone else. I was sick.

I continued to ride the Fat Boy over the next few months, but Stella was constantly in my thoughts. Perhaps I would pass her on the road, and meet her new owner. Perhaps our paths would cross somewhere. But that never happened.

As the summer progressed I set out to try to find her. Through some detective work, I found out she was purchased by a man in the Albany area. He had her name and address, and on Christmas Day 2003 I called him. I introduced myself as the 2002 Road King's previous owner and told him I was interested in buying it from him. The obvious question was, "Why would I want to buy back a motorcycle I sold?" He told me he wasn't interested in selling. The next day I called him again with an offer. I would trade him the 2003 Fat Boy with 13,000 miles for the Road King — a deal-crew swap. He said "nope," and wanted to see the Fat Boy. And I wanted to see Stella. That very day I rode to Albany and there she was — covered in dust, sun bleached, sitting in an unloved garage. She had only been ridden 227 miles. Stella's owner looked at the Fat Boy offer, started it up, and we made the deal. On a snowy January 1, Stella was delivered to my house, and I sent the Fat Boy. That afternoon I delivered her up. Washed and polished, she sat gleaming in my heated garage, but I think she was hurt and angry about what had happened between us. I made amends, and assured her she would never happen again.

Our first ride together was in March 2004, and just like the old days, she looked and ran great. We passed the 20,000-mile mark by late September. It was at that point that I thought about going for Stella. It was a goal that was always in the back of my mind, but I considered it impossible and unattainable.

Two years later in September 2006, Stella and I reached the 100,000-mile mark. It was an historic moment in my life. We did the Great Lakes, Ontario Tour, the 2006 Canadian National Rally in Moncton, the 2005 and 2006 9/11 America's Remembrance rides from Shanken, Pennsylvania to the Pentagon and the World Trade Center site. We did the York Open House tour three times.

Riding 100,000 miles didn't mean I was without a biker girl or two, but Stella continues to look great and run with me. I am very happy and can't imagine life without her. Stella and Fells share a garage. And I commemorate my and Stella's 100,000 miles together with a biker tattoo on my left arm. Now that's love.
2006 GRAND PRIZE WINNER

Andi Albano of Lansdale, Pennsylvania

GRAND PRIZE STORY
Harleys, Thongs, and Knives

My husband, Sal, got up and went to the window of our hotel room. It was quite dark, but he could see it was still raining. Raingear again, and by that time it wasn't any fun at all. We were riding home to the Philadelphia area from Milwaukee after attending the Harley-Davidson 100TH Anniversary celebration, and we were hitting rain every day; rain so dark and so rainy I could hardly see the front wheel of my bike. I kept praying to our guardian angels, while clinging to the knowledge the sun had to come out sometime. More

2006 BEST TOUR WINNER
1st Place Winner
Debra Endler of Harmony, Pennsylvania

2nd Place Winner
Eija Parkkonen of Helsinki, Finland

3rd Place Winner
Diane LaChance of Madawaska, Maine

2006 MOST ADVENTUROUS WINNER
1st Place Winner
Allyen Taylor of Liberty Center, Ohio

2nd Place Winner
Laura Wright Goldenschue of Dripping Springs, Texas

3rd Place Winner
Patricia Davis of Taylorsville, Kentucky

2006 MOST MEMORABLE WINNER
1st Place Winner
Val Martin of Burns, Wyoming

2nd Place Winner
Trina Seitz of Boone, North Carolina

3rd Place Winner
Sandra Babcock of Spokane Valley, Washington
Engineer Peak Experiences
to YOUR orchestra?
And...how can we make our own plans?

HOW DOES THIS APPLY?
H.O.G.® Posse Ride Official Oath

As a member of the H.O.G.® posse, I'm sworn to the following:

While on the trail, I will always look out for fellow Posse Riders.

I will never trailer, and never whine about the food, weather, schedule, or directions.

I solemnly swear to love, honor, and cherish my motorcycle, to share my troubles with fellow Posse Riders but keep my beers to myself, and to visit with fellow Posse Riders on a daily basis.

I promise to live as a Posse Rider, to laugh at the rain, shout back at thunder, eat bugs, sleep in the dirt, and not bathe if absolutely necessary.

I will honor all the rules of common decency, honesty, and chivalry, or I may be asked to leave.

And finally, I will always have fun.

Those in accord with this Official Posse Oath, signify your allegiance with the words . . .

"Heck yes!"
What’s so special about the Oath?

- The Oath is a contract between Harley and its customers
- It moves the rider’s expectation beyond the transaction and towards the relationship
- It addresses some of the stereotypes one might have about Harley riders
- It’s honest
What could an orchestra promise its patrons?

- An exciting artistic product and concert experience
- A friendly and welcoming atmosphere
- Fairness and openness in pricing and policies, as well as a commitment to affordability
- Prompt and thorough service, including the commitment to finding solutions and extending the benefit of the doubt
- Organizational transparency, open communication and a genuine concern for patron feedback and suggestions
PRACTICAL STEPS TO BUILD LOYALTY

What behaviors do we want to encourage?
Customer experience initiative

- 36-point McKinsey CE Plan
  - Unified Customer-Centric Culture
  - Differentiated Subscriber Experience
  - Customer Engagement
  - Website Improvement
  - Fundraising Outreach
  - Pre-Concert Experience
  - Intermission Experience
  - Venue Appearance
The Lynchpin: Fundamentals to build Patron Loyalty & Engagement: 9-11am

Concert experience summary

Top-Box Ratings - Extremely Good

Scale: Extremely good (5) - not good at all (1)

All differences >1% are statistically significant
Practical application

How Orchestras Are Applying PGI in Pursuit of Loyalty

• **New York Philharmonic**
  - Subscribers
    - Subscriber Appreciation Month
      - Names in Programs, Thank You Notes on Seats, Gift Shop Discounts
    - Q&A’s with Music Director, Guest Artists, Musicians
    - Thank You Phone Calls
    - Open Rehearsals
    - Donor Lounge Invites
    - Seat Upgrades
    - **Video Profiles of 50-year Subscribers**
  - **Detroit too**
**Surprise & Delight**

**Extreme Patrons/Loyal Subscribers – Top Two Box Scores**

- **Is reaching out to wider community**
  - S&D: 87%
  - Others: 72%

- **Is working hard to better engage patrons**
  - S&D: 83%
  - Others: 78%

- **Is making concerts more exciting**
  - S&D: 87%
  - Others: 72%

- **Treats me like a valued patron**
  - S&D: 81%
  - Others: 66%

- **Cares about me as a person**
  - S&D: 50%
  - Others: 40%

- **Deserves my support**
  - S&D: 91%
  - Others: 75%

- **An organization I very eager to support**
  - S&D: 87%
  - Others: 79%

- **Bought/definitely buying 2015-16 subscription**
  - S&D: 83%
  - Others: 80%

- **Extremely/very likely to donate in coming year**
  - S&D: 60%
  - Others: 53%

**Base:** Chicago, New York and Cincinnati S&D patrons in 2013-14 and 2014-15; S&D Patrons (N=100); Others (N=1390)
Surprise & Delight has impacted attitudinal and behavioral change among newer/less committed patrons.

- Is reaching out to wider community: 31% (S&D Newer Subs/Multi-buyers) vs 37% (Other Newer Subs/Multi-buyers)
- Is working hard to better engage patrons: 30% (S&D Newer Subs/Multi-buyers) vs 42% (Other Newer Subs/Multi-buyers)
- Is making concerts more exciting: 25% (S&D Newer Subs/Multi-buyers) vs 31% (Other Newer Subs/Multi-buyers)
- Treats me like a valued patron: 20% (S&D Newer Subs/Multi-buyers) vs 35% (Other Newer Subs/Multi-buyers)
- Cares about me as a person: 14% (S&D Newer Subs/Multi-buyers) vs 10% (Other Newer Subs/Multi-buyers)
- Deserves my support: 28% (S&D Newer Subs/Multi-buyers) vs 33% (Other Newer Subs/Multi-buyers)
- An organization I very eager to support: 31% (S&D Newer Subs/Multi-buyers) vs 40% (Other Newer Subs/Multi-buyers)
- Bought/definitely buying 2015-16 subscription: 39% (S&D Newer Subs/Multi-buyers) vs 78% (Other Newer Subs/Multi-buyers)
- Extremely/very likely to donate in coming year: 16% (S&D Newer Subs/Multi-buyers) vs 24% (Other Newer Subs/Multi-buyers)

Surprise & Delight
Newer Subs/Multi-buyers – Top Two Box Scores

- Is reaching out to wider community: 72% (S&D Newer Subs/Multi-buyers) vs 64% (Other Newer Subs/Multi-buyers)
- Is working hard to better engage patrons: 81% vs 64%
- Is making concerts more exciting: 69% vs 62%
- Treats me like a valued patron: 76% vs 53%
- Cares about me as a person: 43% vs 30%
- Deserves my support: 72% vs 63%
- An organization I very eager to support: 74% vs 67%
- Bought/definitely buying 2015-16 subscription: 78% vs 39%
- Extremely/very likely to donate in coming year: 41% vs 26%

Practical application

- Tests of High-Touch Strategy
  - 2,000 Subscribers getting personal concierges
    - 5-6 Proactive touches per year

- Surprise & Delight

- Results: Year One
  - 1st year subs
    - S&D $/HH +40%
    - S&D & PC $/HH +47%
  - 2nd year subs
    - S&D $/HH +22%
Practical application

How Orchestras Are Applying PGI in Pursuit of Loyalty

- **New York Philharmonic**
  - First-Timers
    - Welcome Kits
    - Greeters
    - Offers to Come Back
  - Overnight Satisfaction Surveys
  - Notes to Manny
Notes to Manny
Kudos to Kim
Practical application

How Orchestras Are Applying PGI in Pursuit of Loyalty

• **Chicago**
  • Targeting patrons on the bubble of next commitment level:
    • “Surprise and delight” at concerts: seat upgrades, backstage passes
    • Use excess capacity at donor events for cultivation of nondonors
    • Waive exchange fees
    • Benefits of the Month

• **Boston**
  • Renewers entered contest to win dinner with musicians
  • Boston, Chicago, LA stopped telemarketing and telefunding first-timers
Relationship marketing
Practical steps to build loyalty

**How do we recognize, celebrate and reward those patrons?**

- Establish a point of primary contact among DSO staff
- Communicate regularly, anticipate needs, and provide priority service
- Build relationships and guide them through the process of becoming buyer-donors; donor-buyers
- Be an internal advocate for patron needs and expectations
- Attend events personally and interact with patrons

**How do we measure success?**

- Maximize patron lifetime value for earned and contributed revenue
- Meet and exceed goals for portfolio and patron growth
Structure, Strategic Goal, Philosophy, Metric

BUILDING THE MACHINE
Practical steps to build loyalty

• There are four cornerstones to consider:

  1. Structure
  2. Strategic Goal
  3. Philosophy
  4. Metric
The quintessential patron office

**Team:** Patron Development

**Strategic Goal:** To bring the DSO in contact with as many people as possible

**Philosophy:** Nurture a possibility

**Metric:** Volume

**Consumer:** New or occasional attendee or donor

---

**Team:** Patron Engagement

**Strategic Goal:** To pursue a relationship between the DSO and its audience

**Philosophy:** Nurture a relationship

**Metric:** Retention plus Growth

**Patron:** Regular attendee and/or donor

---

**Team:** Patron Advancement

**Strategic Goal:** To secure the long-term fiscal sustainability of the DSO

**Philosophy:** Nurture an identity

**Metric:** Revenue

**MVPs:** Lifetime and legacy attendee and donor
Key assignment: engagement & loyalty team

- The Patron Engagement Team’s roles are broken into three considerations:
  1. Area
  2. Responsibility
  3. Investigative Process
The Lynchpin: Fundamentals to build Patron Loyalty & Engagement: 9-11am

Patron engagement & loyalty programs team

Team: Patron Engagement

Area: Outreach and Knowledge
Responsibility: Build a foundation and make a first impression
Investigative Process: React and Filter

Area: Care and Service
Responsibility: Provide attention and look for clues for future behavior
Investigative Process: Handle and serve

Area: Engagement and Loyalty
Responsibility: Maintain communication and impress regularly
Investigative Process: Anticipate and offer

Build Trust → Foster Relationships → Earn Loyalty
DSO patron engagement’s five values

1. **Accommodating**: We will find solutions for patrons. We will show understanding when our patrons raise concerns or have extenuating circumstances. When the situation demands, we will judiciously make an exception for our loyal patrons. If we can’t provide the patron with what he or she is requesting, we will provide alternative options.

2. **Responsive**: We will respond to patrons in a timely manner, using all of the communication tools at our disposal to effectively manage high volumes. We will anticipate needs and provide service that exceeds expectations.

3. **Knowledgeable**: We will learn everything we can about the DSO, our policies, and our offerings. We will never leave a question unanswered; instead, we will find out the answer to help the patron and to educate ourselves. We will constantly seek to become better at our jobs, pursuing the skills and tools necessary for success.
4. **United**: We will work as one team, interested in serving the patron above all else. We will support one another. When conflicts arise, we will work together to solve them. As representatives of the DSO, we will always portray the organization and our colleagues positively. As ambassadors of the DSO, we will promote the activities and interests of the DSO.

5. **Disciplined**: We will be accurate, organized, reliable and punctual in fulfilling all of our duties and responsibilities. We will be committed to integrity in the handling of personal information, patron data, and all forms of payment. We will communicate regularly and clearly with our colleagues and our patrons as we meet all deliverables.
The Loyalty Programs Rubric

The goal, why beneficial, examples, why important?

PLANNING & EVALUATING
What are examples of Loyalty Programs?

- Systems
- Acts of service
- Events
- Communications
- Acts of recognition
- Customer interaction
- Lagniappe
Loyalty Programs Rubric

**Goal:** Make the DSO a more active participant in each patron’s life through unforgettable engagement activities and loyalty programs.

<table>
<thead>
<tr>
<th>Score Levels</th>
<th>Patron-Patron</th>
<th>Patron-Musician</th>
<th>Patron-Staff</th>
<th>Patron-DSO</th>
<th>Patron-Music</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Instilled a strong sense of community among patrons, leading them to interact during appropriate moments.</td>
<td>Brought patrons together with one or multiple musicians in a way that instilled a personal connection.</td>
<td>Gave patrons an “above and beyond” experience, reinforcing the idea that patrons can trust and confide in DSO staff.</td>
<td>Contributed to making patrons as committed to the DSO as they are to their friends and family, and likely to keep attending frequently.</td>
<td>Delivered meaningful and interactive insight into the music, investing in patrons’ joy for and knowledge of our art form.</td>
</tr>
<tr>
<td>2</td>
<td>Encouraged and facilitated opportunities for patrons to interact with one another and they did so occasionally.</td>
<td>Encourage and facilitated opportunities for patrons to interact with musicians, and they did so occasionally.</td>
<td>Encouraged and facilitated relationships with staff or provided a forum for meaningful patron assistance.</td>
<td>Encouraged and facilitated opportunities for more frequent or committed involvement with the DSO.</td>
<td>Encouraged and facilitated opportunities to go behind the music and allowed the patron to gain increasing familiarity.</td>
</tr>
<tr>
<td>1</td>
<td>Provided at least one opportunity for patrons to interact with one another.</td>
<td>Provided at least one opportunity for patrons to briefly meet a musician.</td>
<td>Provided at least one opportunity for patrons to meet staff or receive assistance.</td>
<td>Provided at least one opportunity for the patron to discover something new about the DSO.</td>
<td>Provided at least one opportunity to gain insight into the music in a non-interactive manner.</td>
</tr>
<tr>
<td>0</td>
<td>Did not allow or encourage interaction among patrons.</td>
<td>Did not allow or encourage interaction with musicians.</td>
<td>Did not allow or encourage memorable interaction with staff.</td>
<td>Did allow or encourage the patron to come any closer to the DSO.</td>
<td>Did not allow or encourage any additional insight into the music.</td>
</tr>
</tbody>
</table>

**Score**

- **Score Levels**
  - 2
  - 3
  - 1
  - 2
  - 2

**Activity:** **April Patron Open Rehearsal**

**Submitted by:** Lindsey Evert  **Date:** 5/21/12

**Comments:**

The event could use more Patron-staff interaction, perhaps a meet and greet with Patron Engagement Officers.

**Evaluation**

- **Total Score:** 10
- **11-15** Highly successful; worth repeating with minimal alterations.
- **8-10** Moderately successful; worth repeating with one or two key changes.
- **3-7** Average; could be repeated after meaningful improvements.
- **0-2** Lacked critical elements; do not repeat without major overhaul.
Why is building loyalty important?

• Frequency trumps tenure in motivating annual support

• We can inspire and embrace individuals, families, and communities through shared musical experiences

• Combining engagement with thoughtful follow-up creates lasting connections

• Doing more for our patrons adds breadth and depth to the relationship

• It doesn’t happen naturally
Seminar assignment

Practical Loyalty Program Ideas for Your Orchestra

• Conceive one, significant step you might consider taking next Monday to earn more patron loyalty?
  • Include a loyalty engagement strategy that embraces the patron model, and its continuum driving toward “ideal patrons,” respects the research as presented, embraces the individuality of your orchestra, and can be implemented
  • Articulate the reason you would implement this significant step and this specific strategy
  • Summarize the resources or consensus building needed
  • Identify possible nay-sayers, who you’ll have to convince and what you will say to them
  • What are the first few steps required of you to head in a new direction? Who will lead them?
11:00-11:15am

BREAK
Closing discussion

What is a relationship?
Closing discussion

What is a relationship?

• Travels from your head to your heart
• Connection
• Listen
• Trust=follow-through, honest, integrity, what they’re contributing is ___, appreciated, a bit of empathy, affection
• Be Present
• Spirit of commitment
• Reliability

• Types of relationships:
  • Marriage, parent, colleague, client, parent, friend, best friend

• Bad relationships:
  • Fear, dishonesty, not listening, non-empathetic
Wrap Up: 11:15 am–12:15 pm

David Says...

- A relationship is the state of being connected
Adjourn

• 12:30pm