A Strategic Investigation of New Development Initiatives for On Site Opera

Systems Synthesis Final Report
Spring 2022

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The Client

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Managing Director, *Pittsburgh Festival Opera*

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Interviewees

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About Systems Synthesis

At the H. John Heinz III College of Information Systems and Public Policy - School of Public Policy and Management at Carnegie Mellon University, the Systems Synthesis Project is a capstone experience for graduate students. The On Site Opera Systems Synthesis team is composed entirely of 2nd-year Master of Arts Management students who are completing this project in partial fulfillment of their degree requirements.

The System Synthesis project is designed to represent the culminating experience of graduate-level study with hands-on application of concepts presented in the classroom such as project management, teamwork, organizational design, policy and protocol development, professional meeting conduct, delegation, research, communication skills, and negotiation to current real-world problems.

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Executive Summary

On Site Opera (OSO) is a performing arts organization based in New York City. Founded in 2012, the organization has produced site-specific works that challenge traditional opera presentation standards. On Site Opera has a unique artistic position in the cultural environment of New York City as it operates without a permanent venue and chooses spaces that enhance the works being performed. As it celebrates a decade of creating works that engage audiences in unconventional ways, OSO is looking to secure its place in the arts landscape into the future. In order to accomplish this, OSO wants to re-evaluate the way it builds relationships with its patrons and specifically, its donors.

While OSO has established successful fundraising processes, there is still room for growth. On Site Opera ultimately wants to accelerate its fundraising mechanisms and establish long-term financial sustainability. A major obstacle is limited staff capacity; while staff could certainly implement new fundraising strategies, they do not have the time to conduct deep internal or external research. Therefore, OSO looked to the systems team to help with conducting a strategic investigation of new development initiatives. To help the organization accomplish its goals, the systems team conducted research on best practices for fostering relationships with patrons and donors. Specifically, the team focused on practices for cultivating and retaining small and mid-level donors, defined as individuals who give less than $500 or those who give between $500 and $2,499, respectively. This subset of donors presented an opportunity for OSO and a chance to build a more sustainable donor base.

To begin the research process, the team started with preliminary research into OSO and how it has functioned over the organization's decade-long history. Initial research also included meeting with OSO's Executive Director and Development Manager over the course of several weeks to better understand the organization and its needs.

After working with OSO to determine how to best meet its needs given the team's skill set, the team developed the following research question: *How might we identify meaningful and sustainable strategies that leverage On Site Opera's distinctive artistic position for small and mid-level donors?* The research question served as an anchoring point for the team in conducting research and developing recommendations that align with the organization's current artistic and business position while allowing room for future growth.

In order to develop recommendations that could feasibly be utilized by OSO, the team conducted research over the course of the academic semester from January to May 2022 utilizing a variety of methodologies. The initial phase of research included a SWOT analysis, an internal financial analysis, and a literature review of best practices with regard to fundraising. Each of these initial methodologies provided context for later research that would be conducted and laid a foundation for the team's future recommendations.

After receiving feedback from both OSO staff members and several of the team's advisory board members, the team evaluated what additional research methodologies would be helpful in shaping recommendations for the organization. During the second half of the semester, the team looked both inward and outward with its analysis. The team conducted interviews with OSO stakeholders, created donor empathy maps to understand donor motivations, and engaged in benchmarking to examine how other organizations have confronted distinct issues and challenges similar to those at OSO.

With all the research collected, the systems team synthesized the findings into a set of recommendations. These recommendations were organized into three overarching categories called the "Three C's." The first "C," Consistency, refers to creating strong organizational tools for development work and a framework for an effective donor database. The second "C," Capacity, means to create the time and space for staff to cultivate and steward donor relationships and invite stakeholders to help in achieving that goal. The final "C," Communication, refers to engaging donors through specific and reciprocal outreach strategies that clearly convey organizational values and impact. This particular structure for the recommendations came out of several team brainstorming sessions. Research findings and ideas from the semester were compiled and organized according to these larger themes that the team identified as gaps in OSO's current operations.

Within each of the "Three C's," broad recommendations were highlighted that spoke to the most pressing needs of the organization. Some of these recommendations included formalizing fundraising policies and procedures, balancing staffing needs, and determining the "Why," or the value proposition, for the organization. To further clarify each recommendation, the team crafted a list of distinct strategies that could be used to help with implementation. Under policies and procedures, for example, the team recommended writing out and formalizing fundraising procedures according to the Association for Fundraising Professionals (AFP) best practices; and creating resource documents for development staff and advocates. Each strategy allows OSO to further hone its fundraising practices, leverage and build upon its current strengths, and consider how it communicates its values and needs to its donors.

With these recommendations in place, OSO will be better positioned to effectively cultivate and steward small and mid-level donors, ultimately providing a better financial foundation for contributed income and resulting in more meaningful, sustainable relationships that will help the organization grow into the future.

Chapter 1: About On Site Opera

Founded in 2012, On Site Opera (OSO) is a nonprofit opera company based in New York City. As the client for the systems synthesis project, the team launched its research by conducting an organizational overview of OSO to better understand its artistic and operational position. The following chapter provides a background on the information collected during this initial phase, including OSO's mission and values, along with its artistic programming and organizational structure.

1.1 Mission and Core Values

OSO's mission focuses on five key facets:

- *Produce* site-specific productions in venues throughout New York City;
- *Enrich* the cultural life of New York by bringing opera to new audiences;
- *Foster* emerging talent through performance and production opportunities;
- *Collaborate* with local organizations and schools to build community relationships and reach new audiences; and
- *Explore* new technology and production methods in order to reduce the company's environmental impact.[1]

Building upon their mission, OSO has nine core values that they bring to their programming and operational decision-making; those values and how the organization defines them are:

- *Accessibility*: Actively working to remove barriers from and build bridges to participation with our organization and with the opera art form;
- *Adaptability:* Approaching challenges as opportunities, not obstacles, and with a flexible mindset that makes our entire organization more resilient and our programming more vibrant;
- *Diversity:* Actively seeking a range of perspectives, backgrounds, and ideas to advance our mission;
- *Equity:* Recognizing and disrupting social, racial, and economic injustice in our field and society;
- *Humanity:* Cultivating a respectful work culture that uplifts everyone within it and treats all with dignity, which in turn contributes to artistic and organizational excellence;

[1] "What We Do." On Site Opera, June 1, 2021, https://osopera.org/what-we-do/.

- *Imagination*: Thinking innovatively and examining the *status quo* as one of our core competencies;
- *Inclusion:* Embracing people as they are and asking what they need to succeed;
- *Learning:* Continually reflecting on our own successes and failures, curiosity to explore new ideas and processes, and commitment to thought partnership and mentorship within and beyond the organization; and
- *Transparency:* Sharing information within and outside the organization, inviting questions about our processes, and creating systems of accountability.[2]

1.2 Artistic Programming

As the United States's only opera company dedicated to site-specific productions, OSO seeks out new and interesting venues as hosts to their creative vision. From a botanical garden to a wax museum to a cemetery's catacombs, the chosen sites become the set dressings, allowing for their histories, and visual and social connections to imbue the productions with a sensory experience that is distinctive to its setting.

At the launch of its 10th anniversary season in 2022, OSO has produced 22 site-specific productions in 19 unique venues. It has employed 317 artists and reached over 17,000 audience members in New York City and beyond.[3] Staging productions to engage both new and seasoned opera fans, OSO seeks to draw in audiences intrigued by the unfamiliar locale of its productions and immersive storytelling experience. Unbound by convention, OSO creates artistic works with a cross-generational appeal that introduces young audiences to opera with its family-friendly productions, brings attention to wider social issues with community-focused partnerships, and builds artistic collaboration into its programming that serves to broaden its creative voice.

By choosing non-traditional venues for its site-specific productions, OSO reduces its environmental impact by minimizing its need for staging backdrops and utilizing new technologies to advance its productions. Technology is also used as a tool to strengthen the audience experience and to help push the boundaries of what constitutes site-specificity. On Site Opera's use of technology became very important when COVID-19 restrictions limited in-person engagements, allowing the organization to stay connected to its audience and innovate across presentation modes. Through technological innovations including audio walking tours, one-on-one telephone concerts, and interactive Zoom performances, OSO defies the constraints of the site to become something more than its location, expanding its compelling artistic position and refreshing the opera genre as a whole.

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[2] "Values and Commitments." On Site Opera, June 3, 2021, https://osopera.org/values-and-commitments/.
[3] "On Site Opera's 5-year strategic plan (2019-2023)." On Site Opera, 2019.

1.3 Organizational Chart

On Site Opera manages its programming and business operations with a small yet dynamic team, shown in figure 1.1 as OSO's "spheres of influence" which connect across departments and roles. This organizational chart illustrates the interdepartmental communication and collaboration between the four quadrants that all combine to support OSO's mission, with the center of the sphere representing the key decision-makers for the organization.

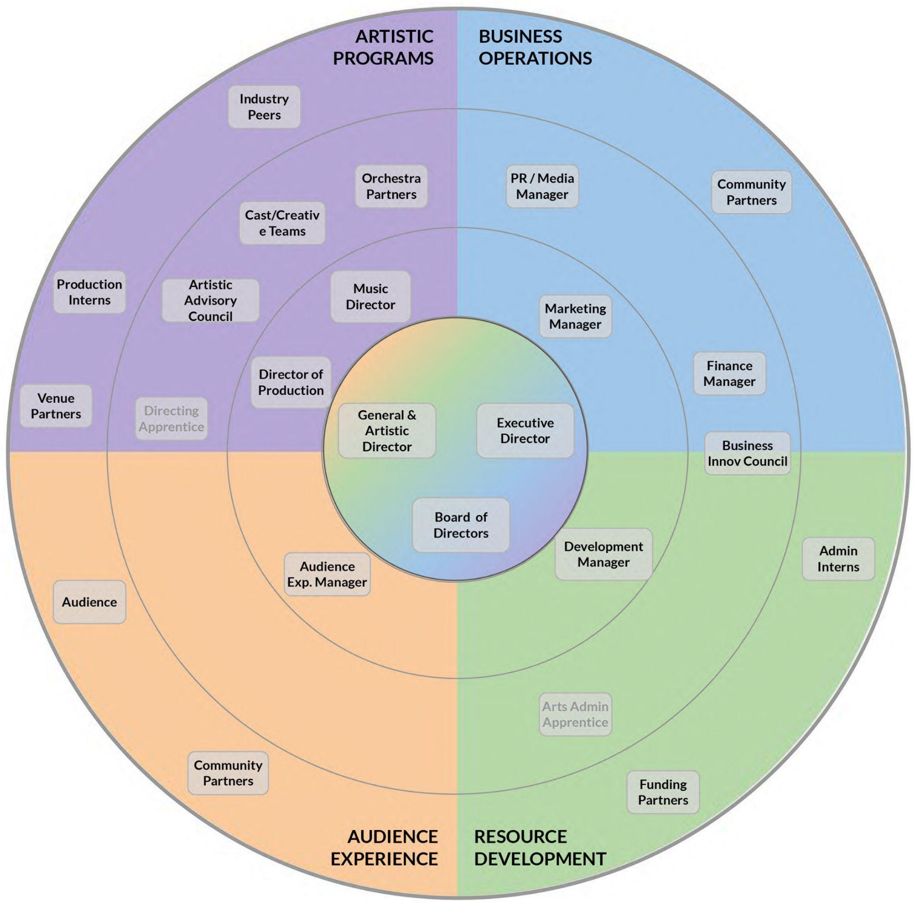

Figure 1.1: OSO Spheres of Influence (Source: On Site Opera)

As shown in the organizational chart, development activities frequently overlap with other departments, such as audience experience when planning fundraising and cultivation events, and business operations when coordinating patron communications. However, only two staff members, the Executive Director and the Development Manager, manage both institutional and individual development activities for the organization, noted on the chart as "resource development." While these activities have been assisted by interns in the past, COVID-19 precautions and remote working conditions have limited the organization's ability to utilize this additional staffing support in recent years.

While small development teams are not unique to an organization of OSO's size, the limited staffing capacity does significantly restrict the amount of time and resources available for both the management and the cultivation of donor relationships. In order for OSO to sufficiently operationalize its development strategies, it will need to center staff capacity in its planning.

Chapter 2: Project Overview

Before engaging in research for this project, it was necessary to outline the scope of work. In the initial project proposal, On Site Opera (OSO) outlined areas for developing fundraising strategies beyond what was already in place. While OSO's staff was confident in their ability to implement new strategies, they lacked the time necessary to engage in deep research. Proposed areas of interest included investigating recurring or planned giving strategies or devising a new tiered system for donor benefits. The resulting deliverable was to be a report highlighting new development strategies that would aid OSO in achieving growth into the future.

In the first several weeks of the semester, the team met with the client to discuss what their goals were as they pertained to outcomes resulting from the systems synthesis process, taking into consideration OSO's proposed ideas for a project trajectory. As part of identifying the research scope, the team conducted a SWOT analysis that helped further identify areas of potential strengths and needs that could be addressed by the team. With this information in mind, the team created a problem statement and research question, encapsulated in a scope of work document that was written and signed by the team and the client. The following chapter outlines the scope of work, including the SWOT analysis, project goals, key terms, methodologies, and other information relevant to the framing of the research presented later in this report.

2.1 SWOT Analysis

The Strengths, Weaknesses, Opportunities, and Threats analysis, or SWOT for short, is a tool used to take stock of an organization's overall strategic position. Strengths and weaknesses focus on internal capacity, while opportunities and threats represent the external factors of the organization's environment. The following analysis was used as an initial research methodology to clarify the gaps the team needed to address and the potential opportunities and assets that OSO might use to address them. A visual summary of these findings is included in this report under appendix A.

2.1.1 Strengths

On Site Opera's unique artistic offering lends it a distinctive niche in the New York City cultural marketplace. The organization's itinerant productions bring a freshness to operatic standards while allowing the flexibility necessary to explore and create new works.

These experiments in reimagining the concert setting are leading to radically innovative means of engaging with audiences. Site-specific shows are shedding new light on what it means to make opera accessible. Instead of rolling captions, OSO's custom mobile app puts live captioning in the hands of ticket buyers, granting them the power to choose the language that best suits them. Taking performances outside traditional spaces, away from stages and ordered seats, provides an opportunity to invite audiences to engage with the art with a greater sense of authenticity. Show after show, OSO staff members are finding that their audiences never want to leave. Even after the final curtain call, audience members linger on-site to continue connecting with each other and the artists.

This innovative approach has created a community of people passionate about site-specific opera. On Site Opera has dedicated board members invested in empowering the organization to continue innovating as it expands its reach and impact. This community of supporters has lent the organization a degree of freedom and flexibility to embody its core values in every aspect of its work. Its commitment to radical accessibility and inclusivity has also led to a solid base of major donors and growing institutional support.

2.1.2 Weaknesses

While this itinerant artistic model provides seemingly limitless possibilities, it also presents a series of challenges. Without a permanent gathering space, each new performance entails a changing audience experience from one location to the next. With each new venue, OSO leadership has to completely recreate a sense of community and consistency for its patrons.

As a still-growing organization, OSO also has to contend with the limitations of a small staff. The first full-time staff member was hired only five years ago and although the organization has grown significantly in that time, engagement and fundraising strategies must contend with that capacity. Limited capacity paired with an itinerant business model has led to a pattern of sporadic engagement with patrons. Visitors and new donors who have not yet fully bought into the mission often lack the consistent touchpoints necessary to build long-term commitment. As a result, though OSO possesses a passionate constituency of major benefactors, it still lacks a core of recurring small and mid-level donors. Because of this, the organization does not yet have a reliable base of annual givers.

2.1.3 Opportunities

Site-specific opera provides the opportunity to create partnerships with local businesses adjacent to new venues. Without the limitations of a single performance space, OSO can forge connections across New York City. Each new location provides the opportunity for creative patron events and engaging ancillary programming. Performances often include pre-show tours and presentations, offering another chance to grow OSO’s family of supporters and build upon its innovative artistic model.

Because OSO is consciously building its identity around values of equity, diversity, and inclusion, it is attracting audiences who are not finding those values embodied elsewhere. Many of the organization’s most devoted patrons are opera lovers who have grown tired and frustrated with the status quo. Those who still want to be around opera but are tired of its reverential treatment of the artform are finding new belonging in OSO's moving seats. These supporters are among the organization's most passionate advocates, sharing their excitement with their opera-going friends and helping to grow OSO's audience through word-of-mouth recommendations. Additionally, OSO's artistic model naturally lends itself to young adults and families. Shorter shows and visually engaging spaces are more accommodating to children and present fewer barriers to involvement for young parents.

2.1.4 Threats

On the other side of these opportunities are the risks with which OSO must contend. The lack of continuity inherent in a nomadic format can present a barrier to long-term relationships. Without a permanent place to call home or a regular seat to subscribe to season after season, OSO leadership must look to other engagement practices to maintain and deepen relationships with their supporters.

The same lack of continuity can also be in conflict with the priorities of the younger audiences OSO is trying to reach. Young professionals, and especially those in New York City, have limited time for leisure and expect predictability and consistency before committing to any activity. Furthermore, while New York has no lack of cultural consumers, there is also a breadth of options to choose from. Highlighting OSO's niche position in the marketplace, and reinforcing the unique value of site-specific opera will be the key to securing returning visitors.

Finally, because OSO lacks a large body of recurring supporters, the organization is still vulnerable to donor shifts. On Site Opera lost connection with many of its loyal donors during the migration of New Yorkers out of the city over the course of the pandemic. This shift demonstrated why it is imperative that OSO engage more stakeholders to sustain its organizational evolution.

2.2 Problem Statement

After a series of client interviews and a deeper look at OSO's internal data, including the SWOT analysis presented in the previous section, it became clear that retaining small and mid-level donors was an area within its current operations that presented the greatest growth opportunity. This conclusion led to the central problem statement:

As On Site Opera continues to expand its reach and solidify its financial sustainability, OSO leadership must find ways to grow its family of supporters with strategies that address the unique set of challenges a constantly changing customer experience entails.

2.3 Research Question

Given the initial client proposal, there were many possible directions for the project. It was critical to narrow down what was the strongest and most viable direction for the team that would be satisfactory for the client. To address the identified problem statement and help frame the team's research methodologies, the following research question was developed:

How might we identify meaningful and sustainable strategies that leverage On Site Opera's distinctive artistic position for small and mid-level donors?

2.4 Key Terms

To provide clarification on the project scope, the team defined key terms embedded within the research question:

- *Meaningful:* strategies that strengthen new and existing relationships and go beyond transactional interactions.

Building relationships beyond merely transactional interactions is a key part of garnering supporters who truly believe in the mission an organization serves. While the breadth of research during this project concerns the relationship between donors and the organization, a stronger approach would be looking at how to rally supporters, regardless of the financial assistance they provide.

- *Sustainable:* strategies that can feasibly be placed into practice given the unique position and capacity of On Site Opera both now and in the future.

As a relatively young site-specific opera company, OSO has a unique place within the artistic community of New York City. It is important to consider what is feasible given how the organization operates in its current iteration and how it will be future-focused as it continues to operate in a post-COVID pandemic environment.

- *Small and Mid-Level Donors:* per OSO's classification, small donors represent patrons who give annual gifts under $500 and mid-level donors represent patrons giving gifts of $500 to $2,499.

Adding this caveat to the research question was crucial in defining the scope of the team's research. There are many other considerations with regard to the cultivation of major gifts but given the client proposal, it was important to focus specifically on this donor subset.

2.5 Research Objectives and Methodologies

The team conducted research and analysis from two perspectives: internal and external. The internal research was conducted to better understand how OSO operates as an organization, and what its history and previous fundraising activities look like. External analysis served to provide a look at the broader fundraising landscape in order to compare OSO's practices and outcomes with those of other organizations with a similar size and structure.

The team's internal analysis was conducted through the framework of a development audit, taking stock of areas of strengths and weaknesses in OSO's fundraising practices, policies, and procedures. Internal analysis methodologies included reflecting upon the materials provided to the team directly from the client and conducting guided research extending upon the raw data provided. Methodologies for the internal analysis included:

- Financial Analysis
    - Utilizing Forms 990, internal budget projections, audited financial statements, and statements of cash flows to assess OSO's financial position, both overall and from a development perspective.
- Customer Relationship Management (CRM) Database Analysis
    - Utilizing OSO's collection of donor data to determine and extrapolate patterns and behaviors of present and previous donors, and to determine how OSO currently collects donor data.
    - Gaining an understanding of who OSO's donors are and where they come from
- Contributed Income Audit
    - Analyzing all aspects of OSO's contributed income streams to analyze its financial position and to determine areas of strength and weakness.

External analysis methodologies looked outside of OSO to the broader performing arts fundraising ecosystem. Methodologies for the external analysis included:

- Literature Review
    - Synthesizing and summarizing best practices in the field, culled from experts and other recognized fundraising organizations.
- Stakeholder Interviews
    - Analyzing previously conducted surveys from OSO and conducting stakeholder interviews as a team.

- Donor Empathy Mapping
  - Engaging with the personal journeys of current and potential donors with OSO staff to determine pain and gain points, areas of strength, and opportunities for improvement.
- National Benchmarking of Other Performing Arts Organizations
  - Utilizing patterns and processes from companies with a similar operating budget and size, with particular a focus on opera companies and site-specific performing arts organizations, to assess OSO's relationship to industry standards.

2.6 Deliverables

The final deliverables are donor engagement strategies for attracting, cultivating, and retaining small and mid-level donors for OSO with an analysis of recurring gift programs, new development initiatives, and a set of recommendations for implementation that will be communicated through a midpoint presentation, final presentation, and final report.

2.7 Known Exclusions

- Creation of a development plan
- Creation of a communications or marketing plan
- Creation of planned/legacy giving strategies
- Implementation of strategies or implementation of recommendations
- Research into CRM software

2.8 Project Timeline

There were three overarching deliverables the team was responsible for preparing: a midpoint presentation, a final presentation, and a final report. This required the team to plan for the trajectory of the project, as seen in figure 2.1. The midpoint, presented on March 2, 2022, gave an overview of the information collected up to that point. The presentation included an explanation of the project, the client, initial research findings, and next steps for the project. The final presentation was given on May 5, 2022, to an audience composed of On Site Opera staff, advisory board members, and members of the CMU community. This presentation covered the breadth of the team's research, along with recommendations for the client to implement in the future. The final report was delivered to the client and CMU administrators on May 9, 2022, and presents all findings from the presentations, including additional information, figures, and expanded research.

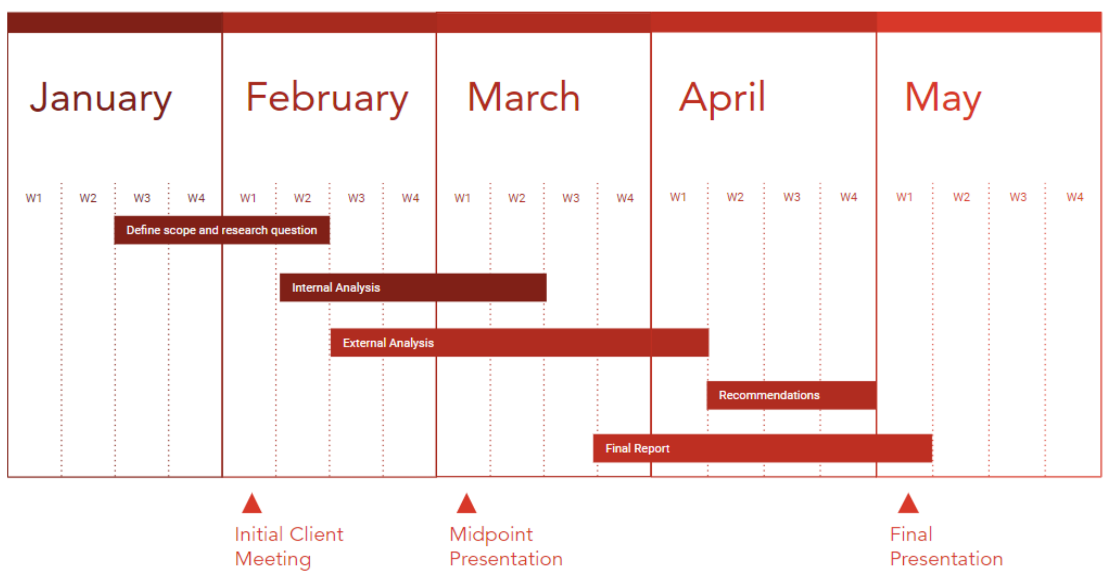

Figure 2.1: *System Synthesis project timeline from the OSO Systems Synthesis Team*

Chapter 3: Literature Review: Fundraising Best Practices

To provide a framework for research, the team conducted an initial literature review to examine best practices in the fundraising field related to donor engagement. These findings were used to provide context for the internal analysis and to inform the benchmarking that would be a part of the team's stated research methodologies. Ultimately, these best practices, while guiding the project's research, also helped the team determine gaps to address as a part of the final recommendations.

3.1 Traditional Fundraising Models

First, it was important to identify what the current literature discussed as far as traditional fundraising models. Traditionally, donors are segmented according to the "donor pyramid," also sometimes called the "donor ladder."[4] This framework is based on the belief that smaller donors, once cultivated, can be "moved up" the donor scale. Over time, these donors would then make larger, and more frequent gifts, or become otherwise involved with the organization.[5]

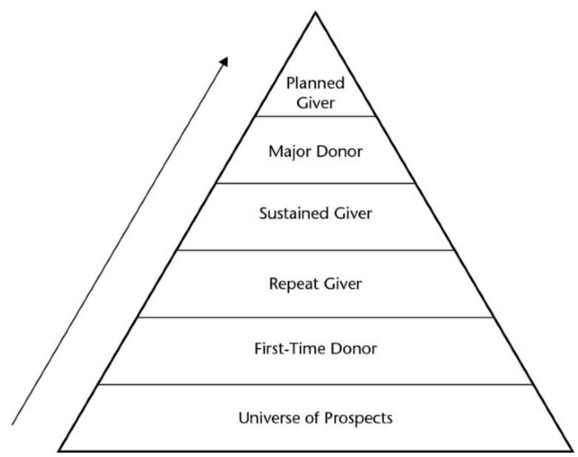

Figure 3.1: The Donor Pyramid from Fundraising Principles and Practice by Adrian Sargeant and Jen Shang, second edition, Hoboken, New Jersey: John Wiley & Sons, Inc, 2017.

The observation is that many more small gifts are made than larger ones, thus creating a pyramid base made up of small donors. However, 80 to 90 percent of all donations tend to come from the top 10 to 20 percent of donors.[6] These major donations are much less frequent than small, consistent gifts. For this reason, OSO is looking to grow donors at specific levels of the pyramid including first-time donors, repeat givers, and sustained givers. Cultivating these donor levels provides the organization with a sustainable financial

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[4] Adrian Sargeant and Jen Shang, *Fundraising Principles and Practice*, Second (Hoboken, New Jersey: John Wiley & Sons, Inc, 2017).
[5] Sargeant and Shang, *Fundraising Principles and Practice*.
[6] Sargeant and Shang, *Fundraising Principles and Practice*.

base to propel them forward in the years to come.

However, this framework isn't perfect. The donor pyramid tends to put an overemphasis on major donors, has been criticized for being "over-simplistic and static,"[7] and is overall too rigid to allow for the nuance necessary in cultivating lasting donor relationships.

3.2 The Community-Centric Fundraising Model

Due to the weaknesses of traditional models, and calls for more transparency and equity across the sector, a new model called Community-Centric Fundraising (CCF) has become more widespread. Community-Centric Fundraising is a movement that actively works to disrupt the traditional fundraising models and create more equitable giving practices. Per their website, "Community-Centric Fundraising is a fundraising model that is grounded in equity and social justice. We prioritize the entire community over individual organizations, foster a sense of belonging and interdependence, present our work not as individual transactions but holistically, and encourage mutual support between nonprofits."[8] Its values include equity, courage, community, integrity, and movement building.[9]

To move this work forward, CCF has created 10 Guiding Principles that organizations should implement to create a more equitable giving landscape:

1. Fundraising must be grounded in race, equity, and social justice.
2. Individual organizational missions are not as important as the collective community.
3. Nonprofits are generous with and mutually supportive of one another.
4. All who engage in strengthening the community are equally valued, whether volunteer, staff, donor, or board members.
5. Time is valued equally as money.
6. We treat donors as partners, and this means that we are transparent, and occasionally have difficult conversations.
7. We foster a sense of belonging, not othering.
8. We promote the understanding that everyone (donors, staff, funders, board members, volunteers) personally benefits from engaging in the work of social justice – it's not just charity and compassion.
9. We see the work of social justice as holistic and transformative, not transactional.

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[7] Sargeant and Shang, *Fundraising Principles and Practice*.
[8] "Home." Community Centric Fundraising, accessed March 18, 2022, https://communitycentricfundraising.org/.
[9] "Values." Community Centric Fundraising, accessed March 18, 2022, https://communitycentricfundraising.org/ccf-movement/values/.

10. We recognize that healing and liberation requires a commitment to economic justice.[10]

Building on this foundational work, the organization OPERA America is currently drafting a paper, using OSO as a case study, to adapt the CCF model and principles specifically for opera and the performing arts. These community-centered practices from CCF and OPERA America, serve as a criterion for the team's research in the development of equitable engagement strategies and solutions for OSO.

3.3 Donor Acquisition and Retention

With the frameworks of the traditional fundraising pyramid and Community-Centric Fundraising in mind, the team analyzed the ways in which donors are acquired and retained by organizations. This was an area that was identified as an opportunity for improvement for OSO.

Total dollars earned is not the primary statistic on which fundraisers should place their focus. Rather, tracking donor loyalty by measuring retention rates is much more useful and shows how engaged donors are with the organization.[11] A focus on retention rates is important from a financial perspective as researchers estimate that it can cost as much as 10 times more to acquire a new donor than it does to retain an existing one.[12] Furthermore, industry averages suggest that it can take up to 5 years to steward a major gift, meaning retention of donors will help to build relationships that can lead to larger gifts at a later date.[13] The successful stewarding of donors for the long term is directly related to higher lifetime giving,[14] which is generally much higher than any single gift that could be given. However, even with this focus on donor retention, the average year-on-year donor retention rates for the nonprofit sector are only about 46 percent. Nonprofit professionals agree that this less than 50 percent donor retention rate is not good enough and fundraisers should be aiming for a percentage in the 90 percent range which is comparable to for-profit customer retention rates.[15]

Beyond financial incentives to retain loyal donors, retention can be helpful for the organization as a whole. Donors who have an ongoing relationship with the organization can help spread awareness and foster engagement with the organization through a variety of mechanisms such as engaging others through word-of-mouth promotion of the

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[10] "Principles - CCF." Community Centric Fundraising, accessed March 18, 2022, https://communitycentricfundraising.org/ccf-principles/.
[11] Simone Joyaux, "Keep Your Donors: It's the Right Thing to Do—And It Makes You More Money!." Non Profit News | Nonprofit Quarterly, July 29, 2016, https://nonprofitquarterly.org/keep-donors-right-thing-makes-money/.
[12] Joyaux, "Keep Your Donors."
[13] Jay Love, "3 Reasons Why Donor Retention Trumps New Donor Acquisition." Bloomerang, November 28, 2017, https://bloomerang.co/blog/3-reasons-why-donor-retention-trumps-new-donor-acquisition/.
[14] Love, "3 Reasons."
[15] Joyaux, "Keep Your Donors."

organization and its programs, volunteering their time and talents, providing feedback, and participating in peer-to-peer fundraising campaigns.[16]

To build the relationships necessary to retain loyal donors and achieve better retention outcomes, fundraisers use the fundraising cycle as a model. This five-step process maps how an individual donor is acquired and retained over time, thus providing structure to development planning within the organization.

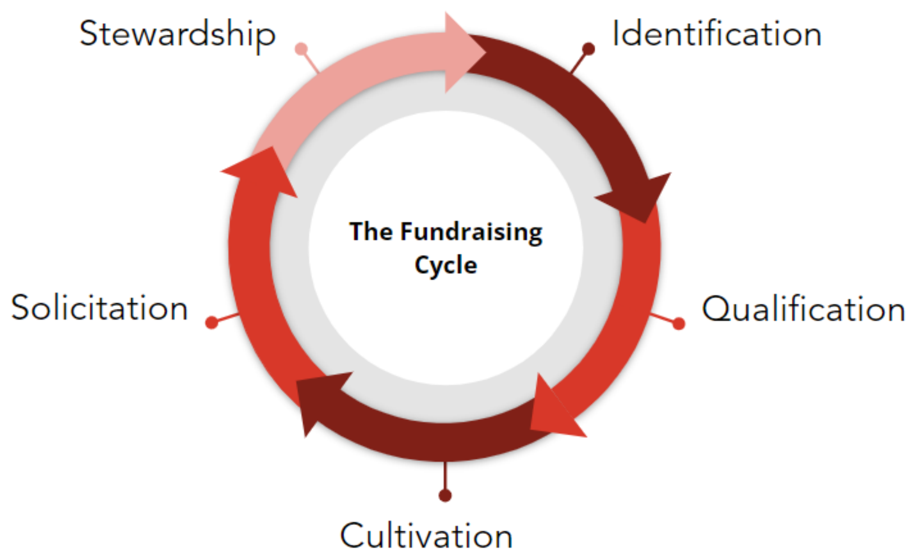

Figure 3.2: The Fundraising Cycle from the OSO Systems Synthesis Team

The five steps are identifying potential donors from an already existing pool, or from the surrounding community; qualifying each donor based on their capacity to give and their relationship with the organization; cultivating relationships, which includes educating donors about the organization; soliciting donors through a personal ask as part of a fundraising campaign or in support of a program or project; and finally, stewarding the donor by thanking them and encouraging them to become a renewal donor. All this is done with the goal of creating donors who become more deeply involved in the organization over time.

This model is effective in talking about retaining donors at all levels and stresses the importance of individual relationship building as an integral part of the fundraising process.

[16] Adam Weinger, "4 Reasons Why Your Nonprofit Should Emphasize Retention." Double the Donation, July 10, 2019, https://doublethedonation.com/tips/why-your-nonprofit-should-emphasize-retention/.

3.4 Annual Giving

Closely related to the fundraising cycle and donor retention are annual giving campaigns, defined as "an organized institutional effort to solicit regular donations from donors."[17] Annual funds are generally used to support the daily operations of a nonprofit organization and its ongoing programs.[18] Building a strong annual fund is the first step in creating a robust development plan as it requires much less time to handle yearly renewals than it does to acquire all new donors.[19]

The terms "annual fund" and "annual giving" are often used interchangeably but refer to different elements of an annual campaign. According to The Annual Giving Network, the term "annual fund" refers to an account or group of accounts where monetary gifts are held. These gifts could be restricted or unrestricted depending on the definition of the organization.[20] The term "annual giving" on the other hand, is broader and refers to the hope that donors and alumni of an organization will give on a yearly basis, regardless of where the gifts are allocated.[21] It is also important to note that annual giving differs from major giving; annual gifts are generally smaller and support organizational operations rather than long-term projects.[22] With these definitions in mind, organizations can begin exploring what an annual fund or annual giving campaign might look like for them.

There are several motivations that move organizations to engage in annual giving campaigns. One motivation is to cultivate a large group of donors to actively give to an organization that they care about while moving them towards more, or larger, gifts. This can occur by asking donors to "renew" their donation each year or increase their level of support.[23] Consistent annual donors may not give large amounts, but the lifetime value of their donations is substantial, and they can be stewarded to become major or planned givers over time.[24] Another motivation comes from recent developments in the field which allow organizations to steward "subscription givers" by spreading their annual giving over monthly payments, rather than giving their gift as a single payment. This can help motivate donor demographics that are unable to pay large sums all at once but are willing to pay small amounts over time.[25] For either method of annual gift collection, consistent annual givers can potentially make large lifetime contributions to the organization or be stewarded to become major or planned givers.

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[17] Sargeant and Shang, *Fundraising Principles and Practice*, 37.
[18] Sargeant and Shang, *Fundraising Principles and Practice*, 37.
[19] Sargeant and Shang, *Fundraising Principles and Practice*, 37.
[20] "Understanding the Difference between Annual Fund and Annual Giving." *AGN* (blog), March 23, 2021, https://agnresources.com/2021/03/23/difference-annual-fund-annual-giving/.
[21] "Understanding the Difference," *AGN.*
[22] "Understanding the Difference," *AGN.*
[23] Sargeant and Shang, *Fundraising Principles and Practice*.
[24] Sargeant and Shang, *Fundraising Principles and Practice*.
[25] Sargeant and Shang, *Fundraising Principles and Practice*.

A successful annual appeal or annual giving program relies heavily on donor retention from year to year; last year's donors are this year's likeliest renewals.[26] Some best practices to help improve annual giving outcomes include the following:

- Define what donations count as "annual fund" donations for the organization. This takes into consideration stakeholder information, discussions within the organization, and current organizational needs.[27]
- Plan early and utilize the current year's fundraising results to help facilitate planning for the next year.[28]
- Set and regularly review annual fund goals.[29]
- Communicate with donors. Communication strategies include sending reminders to donors with open pledges or making a second ask to those who gave earlier in the fiscal year.[30]
- Involve the board in planning and outreach efforts to reach a wider network of potential donors.[31]

While this is by no means an exhaustive list of all the strategies for annual giving success, implementing these best practices gives organizations the ability to build relationships with donors while still bringing in necessary funds during an annual giving campaign.

3.5 Donor Segmentation

Through the research regarding donor acquisition and engagement, the team found that donor segmentation is an incredibly useful tool for communication, acquisition, and retention of donors. According to the Association of Fundraising Professionals (AFP) Fundraising Dictionary, to segment means to subdivide donors or prospects into smaller groups with similar characteristics; segmentation refers to a particular market segment.[32] By taking the time to segment and learn about the market conditions specific to that segment, organizations can improve their retention rates through targeted communication.

Dr. Adrian Sargent, an Australian academic who co-founded and co-directs the Institute for Sustainable Philanthropy, is considered one of the foremost authorities in the fundraising field and continues to conduct research while publishing his findings and teaching at

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[26] "Boosting Year-End Annual Fund Results." AGN, May 6, 2021, https://agnresources.com/2021/05/06/optimizing-year-end-annual-fund-results/.
[27] "Redefining What Counts in Your Annual Fund." AGN, June 14, 2021, https://agnresources.com/2021/06/14/redefining-what-counts-in-your-annual-fund/.
[28] "Boosting Year-End Annual Fund Results," *AGN*.
[29] "Boosting Year-End Annual Fund Results," *AGN*.
[30] "Boosting Year-End Annual Fund Results," *AGN*.
[31] "Boosting Year-End Annual Fund Results," *AGN*.
[32] "AFP Fundraising Dictionary." Association of Fundraising Professionals, 2003. https://afpglobal.org/sites/default/files/attachments/2018-11/AFPFundraisingDictionary.pdf.

leading philanthropy institutions in the U.S. and Australia. In 2001, he conducted a survey in which lapsed donors cited three reasons why they chose to discontinue their giving to an organization. These reasons included the donor feeling that another organization was more deserving, the donor not receiving thanks for the gift they gave, or the donor receiving communications that were not appropriate for them.[33] These lapsed donors are a concern for organizations. According to the Fundraising Effectiveness Project, if a donor stops giving, there is only a 5 percent chance that the donor will ever come back.[34]

There is also research concerning the main reasons that donors continue to give to an organization. A 2011 survey by DonorVoice revealed that donors who continued to give to an organization did so because they were thanked quickly, told how their gift was utilized, and given impact stories from the organization.[35] Therefore, creating targeted groups of donors with similar characteristics and communicating with each group in an appropriate manner allows the organization to meet the needs of donors who want to know that their gift makes a difference. Stephen Shattuck, Chief Engagement Officer at Bloomerang, states that “Donor segmentation powers stewardship,”[36] and the available research agrees. Segmentation is a more effective strategy for donor retention than sending out one message to all donor types.

One method useful in determining donor segments is donor empathy mapping. This is defined as a process for professionally guided brainstorming sessions with a cross-departmental team to identify one or more donor personas that are unique to the organization.[37] Brainstorming is focused on user experiences of donor interactions rather than on data, budgets, and other qualitative tools.[38] This is similar to creating marketing personas and is based on the idea that if an organization knows its donors on a more personal level, it can communicate with them more effectively.[39]

Donor empathy mapping considers four focus areas related directly to the donor and two tangential focus areas related to the donor's experiences with the specific organization. The first area of focus is demographics. This includes asking questions to investigate what the team knows about a particular type of donor in terms of average age, income level, culture, gender, and household makeup. The team would also consider donor behaviors including how they donate, what they say about the organization, and their attitudes toward giving. A third focus area is aspirations; what motivates the donor, what keeps them up at night, and what are their goals in life? Finally, the team would consider influence which focuses on the

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[33] “An Introduction to Donor Data Segmentation.” Association of Fundraising Professionals, August 31, 2018, https://afpglobal.org/introduction-donor-data-segmentation.
[34] “An Introduction to Donor Data Segmentation,” Association of Fundraising Professionals.
[35] “An Introduction to Donor Data Segmentation,” Association of Fundraising Professionals.
[36] “An Introduction to Donor Data Segmentation,” Association of Fundraising Professionals.
[37] Melody Song, “Methods and Processes: Donor Personas—Creating Donor Profiles With Empathy Mapping.” Association of Fundraising Professionals, December 30, 2020, https://afpglobal.org/news/methods-and-processes-donor-personas-creating-donor-profiles-empathy-mapping.
[38] Song, “Methods and Processes.”
[39] Song, “Methods and Processes.”

external factors that play a role in how or when a donor gives.[40] The two tangential focus areas are barriers to giving, and measures of impact.[41] The organization should consider these elements as they work to make giving more accessible and measurable for donors. Further research on the process of donor empathy mapping and how it might inform segmentation and the creation of more effective messaging is outlined in chapter 6.2 of this report.

3.6 Fundraising Policies and Procedures

The final area of focus for the initial literature review explored the importance of clearly stated fundraising policies and procedures for an organization. There are several reasons why organizations without these policies in place need to create and implement them. In recent years, nonprofits have come under increased scrutiny, especially since the 2002 passage of the Sarbanes-Oxley Act which drastically changed financial reporting laws for organizations. These changes paired with increased levels of individual giving have made nonprofits review, evaluate, and change fundraising operations.[42] Additionally, public trust and specifically donor trust comes from transparent, clear guidelines on how donations are accepted and managed by the organization.[43] These policies also help staff onboard more quickly and work more efficiently by standardizing procedures such as recording and acknowledging gifts, and preparing receipts. Written directives also help to preserve institutional knowledge of these processes through any potential employee or executive turnover.[44]

These fundraising policies and procedures, according to the Association of Fundraising Professionals (AFP), should focus on several overarching areas of concern for the organization. Internal documents need to address gift policies that, above all, need to be organized, consistent and accurate; donor policies that include donor recognition and naming policies along with procedures that protect donor privacy and confidentiality; and adherence to government regulations that include the IRS disclosure statement policies and required disclaimers on direct-mail pieces.[45] AFP resources like the Fundraising Procedures and Policies Checklist, A Donor Bill of Rights, and the AFP Code of Ethical Standards, provided for reference in appendix B of this report, serve as teaching tools and frameworks for building an institutional policy.[46] AFP also provides sample policy and procedure documents to help organizations start creating their own written policies and procedures.

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[40] Song, "Methods and Processes."
[41] Song, "Methods and Processes."
[42] Barbara Ciconte and R. Scott Fortnum, *Developing Fundraising Policies and Procedures: Best Practices for Accountability and Transparency* (Association of Fundraising Professionals, 2019).
[43] Ciconte and Fortnum, *Developing Fundraising Policies*.
[44] Ciconte and Fortnum, *Developing Fundraising Policies*.
[45] Ciconte and Fortnum, *Developing Fundraising Policies*.
[46] Ciconte and Fortnum, *Developing Fundraising Policies.*

3.7 Best Practices Summary

These six overarching best practice areas serve as a comparative framework for the team's internal analysis to identify gaps within OSO's current donor operations. Understanding traditional fundraising models and their alternatives is an important aspect of development work. In understanding the shortcomings of traditional models, an organization can begin to make changes to its fundraising approach to more closely align with its organizational values. Within these models, care should be taken to understand the importance of retention versus acquisition, not only for financial reasons but with regard to staff capacity; retaining donors is the more valuable option. To help improve retention rates, segmentation that allows for more effective communication with different types of donors will aid in retaining donors in the long term, which leads to increased giving. Finally, implementing policies and procedures modeled after those crafted by AFP will enhance the ability of an organization to efficiently manage gift receipts, donor acknowledgments, and government regulations.

A focus on these best practices helped to guide the systems team's research and recommendations.

Chapter 4: Internal Analysis

As one of the team's major areas of research, a development audit was conducted of On Site Opera (OSO) as a method of internal analysis.

A development audit is a cataloging and analysis of all fundraising efforts conducted by an institution. It features both quantitative and qualitative analysis of the organization's fundraising practices in order to determine points of success and areas for growth while backing up these assertions with observable data. As defined by nonprofit consultants Affinity Resources, "a development audit looks at an organization's resource development efforts and resources 'from soup to nuts' to identify areas of challenge and opportunity" and to " identify steps [the organization] can take that will increase [its] fundraising revenue."[47]

For this project, the development audit served as an in-depth analysis of OSO's donor base, finances, and contributed income programs. Specifically, the team conducted an analysis of data from OSO's CRM system to ascertain an in-depth picture of donor behaviors and demographics. The team also conducted a financial analysis of OSO to determine the overall financial health of the organization, comparing past performance to predictions for fiscal year (FY) 2022 success. Finally, the team conducted a contributed income audit, taking a deep dive into OSO's fundraising activities, initiatives, and policies to analyze strengths and weaknesses across funding streams.

4.1 CRM Data Analysis

As a first phase of the internal analysis of OSO, the team initiated an in-depth study of OSO's Customer Relationship Management (CRM) data. By applying data analytics tools to the CRM reports, the team developed a vision of who OSO's donors are right now. With this analysis, the team set out to determine the organization's current state of affairs and identify potential gaps to address in the future recommendations. To do so, the team utilized the fundraising best practices outlined in the literature review in chapter 3.

[47] "Development Audit." Affinity Resources, accessed April 19, 2022, https://www.affinityresources.com/pgs/awz21.html#:~:text=Search%3A%20Advanced-,Development%20Audit,areas%20of%20challenge%20and%20opportunity.

4.1.1 OSO's Donor Base

Since the organization's founding in 2012, OSO has had 603 individual donors.[48] These 603 donors have made 1,521 individual donations for an average individual donation of $1,991.96.[49]

On Site Opera has acquired these donors gradually over time. The organization's cumulative donor acquisition remained relatively stable in OSO's early years, before hitting its first period of growth in 2015.[50] This was followed by a large spike beginning in 2019 that has leveled off in recent years, as shown in figure 4.1.[51] On Site Opera's biggest year in terms of acquisitions occurred during the COVID-19 pandemic; from 2020 to 2021 OSO gained 163 new donors, an increase of 38.17 percent year-over-year.[52]

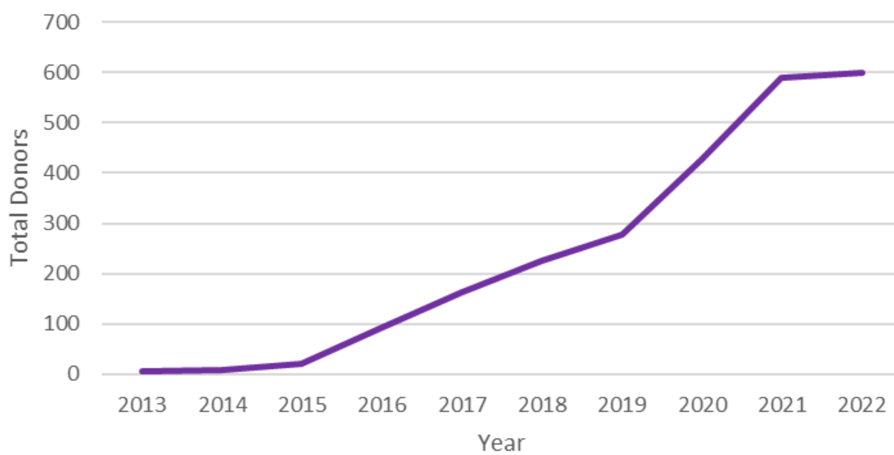

Figure 4.1: OSO Cumulative Donor Acquisition Over Time from OSO Systems Synthesis Team.

However, while OSO has over 600 donors, they are not all classified as "active" or are currently giving. Of OSO's 603 donors, only 26.2 percent have given a gift in the last eighteen months, which is the period of time OSO uses to classify whether a donor is "active."[53] As mentioned in chapter 3.3, the average nonprofit retention rate for donors is roughly 46 percent,[54] almost double OSO's current rate.

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[48] "All Donations with Type." Patron Manager, On Site Opera, accessed 21 February 2022.

[49] "All Donations with Type," On Site Opera.

[50] "All Donations with Type," On Site Opera.

[51] "All Donations with Type," On Site Opera.

[52] "All Donations with Type," On Site Opera.

[53] "All Donations with Type," On Site Opera.

[54] Love, "Three Seasons."

Additionally, it is important for an organization to understand its community, including where donors are located. Based on ZIP code data shown in figure 4.2, 52.9 percent of OSO's donors come from New York City.[55] It was also observed that 31.34 percent of donors are not from New York City, which includes locations in other cities in New York state, locations throughout the United States, and international locations.[56] It is noteworthy that for 15.75 percent of donors to OSO, their location is unknown.[57]

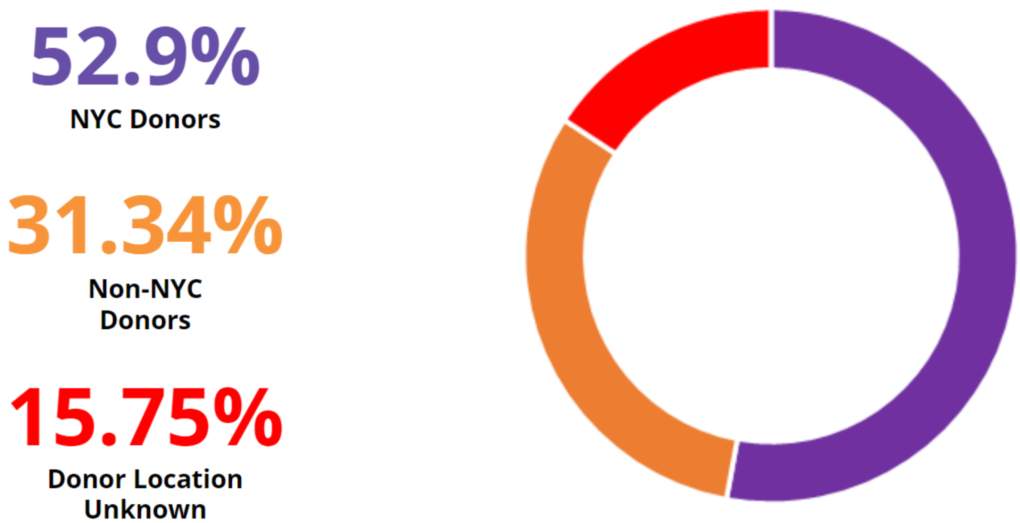

Figure 4.2: Location of OSO Donors by ZIP Code Data from OSO Systems Synthesis Team.

55 "All Donations with Type," On Site Opera.
56 "All Donations with Type," On Site Opera.
57 "All Donations with Type," On Site Opera.

4.1.2 Donor Tiers

On Site Opera currently divides its donors into tiers based on giving amount. While OSO is currently shifting its conception of donor "tiers" from the traditional model segmented by gift amount to the community-centric model, it is still helpful to review the statistics underlying its current segmentation practices. On Site Opera defines "small donors" as those who give less than $500. While OSO's donor tiers are based on annual giving amounts, to determine the tier makeup of OSO's donor base as a whole the team calculated which tier each donor would fall into based on lifetime giving, which is shown in figure 4.3. Based on this lifetime giving, 79.1 percent of OSO's donors would be categorized as small donors.[58] Twelve point two seven percent would be mid-tier donors, who have given between $500 and $2,499, and 8.62 percent would be categorized as major donors, giving over $2,500.[59] In terms of prospecting, OSO begins targeting donors for major gift cultivation at the $1,000 giving level. This means that 3.65 percent of donors can be considered major gift "prospects."[60]

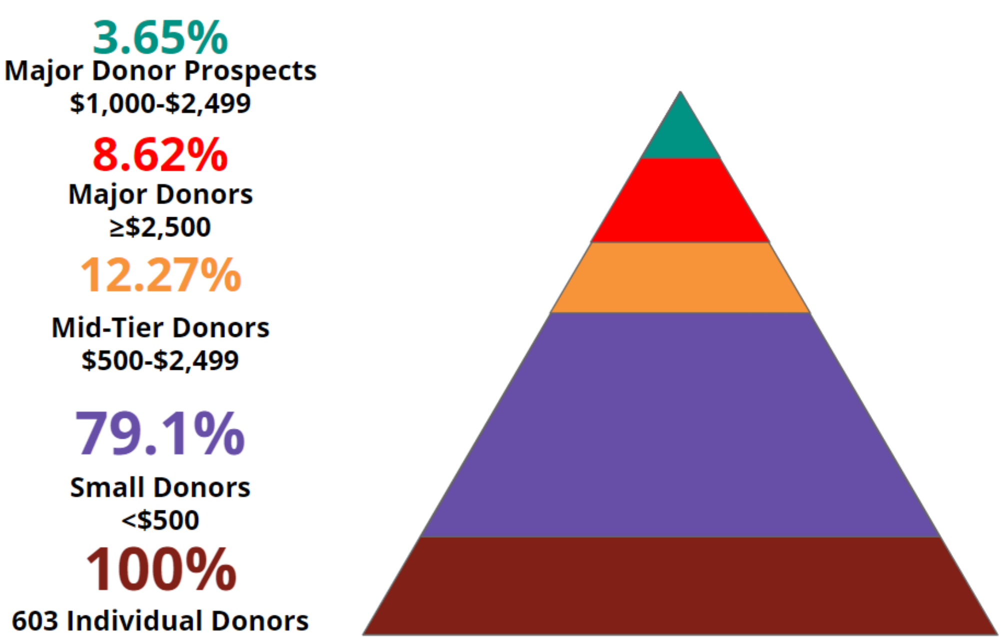

Figure 4.3: Segmentation of OSO Donors by Giving Level from OSO Systems Synthesis Team.

[58] "All Donations with Type," On Site Opera.

[59] "All Donations with Type," On Site Opera.

[60] "All Donations with Type," On Site Opera.

4.1.3 Major Donors

On Site Opera has had the amazing fortune to have an incredibly generous major donor who has committed foundational gifts to the institution for several years. In FY 2016, 76.5 percent of OSO's total funding came from this donor.[61] However, as OSO is seeking to diversify its fundraising streams and engage small and mid-level donors more heavily, this generous patron remains its largest donor year-over-year but by a steadily decreasing margin. By FY 2019, the percentage of OSO's revenue that came from its largest donor, represented by the purple segments in figure 4.4, decreased to 47.9 percent, while its revenue percentage that came from other fundraising streams, represented by the orange segments, increased from 19.8 percent in FY 2016 to 34.9 percent in FY 2019.[62] This demonstrates the organization's ability to diversify revenue streams to sustain operations as it continues to grow over time.

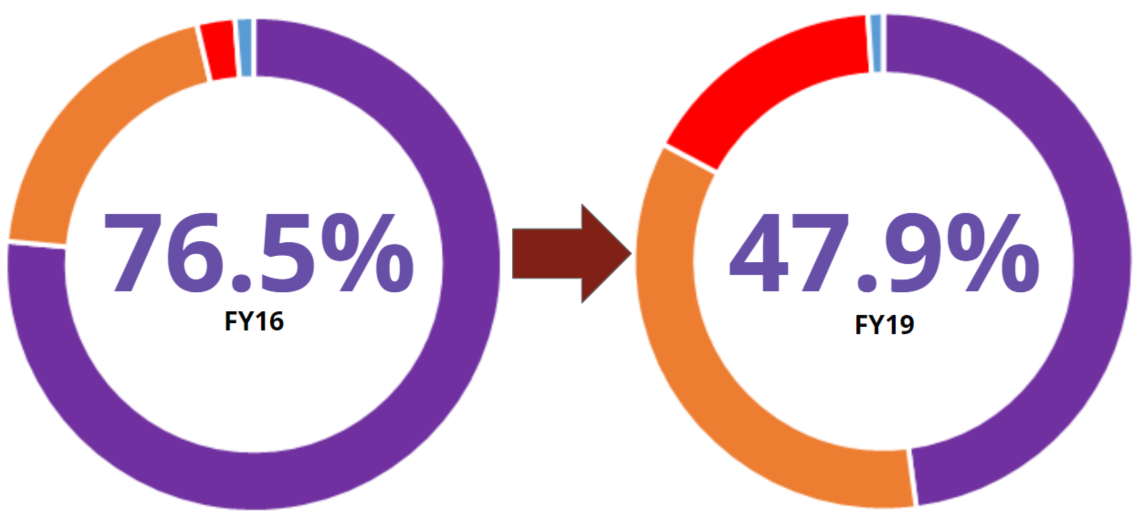

Figure 4.4: Revenue Percentage from Largest Donor from OSO Systems Synthesis Team.

[61] "On Site Opera's 5-year strategic plan (2019-2023)." On Site Opera, 2019.

[62] "5-year strategic plan," On Site Opera.

4.1.4 Recurring Donors

As OSO seeks to increase its number of small and mid-level donors, it is also looking to increase consistent, recurring donors. In analyzing current donors who have already made multiple gifts to the organization, 186 donors, or 30.85 percent of OSO's donors, have given more than one gift to OSO in their lifetime.[63]

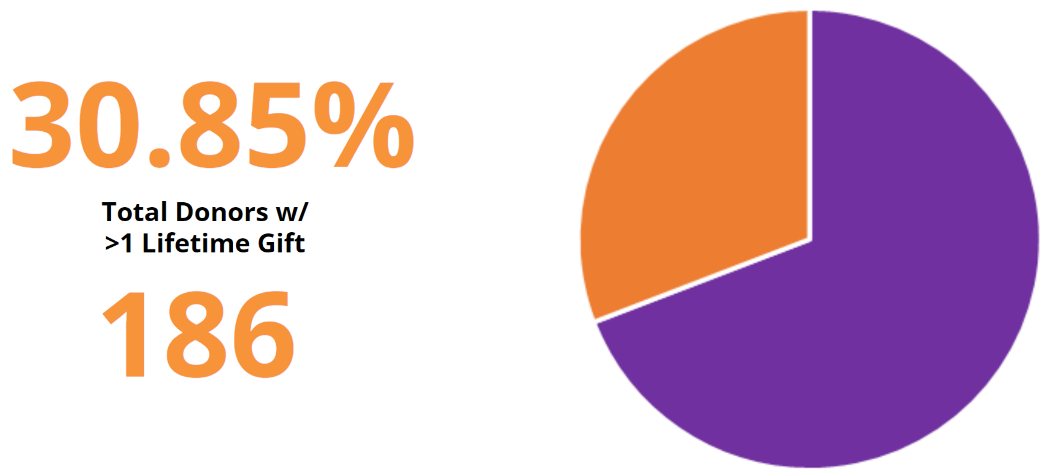

Figure 4.5: Donors with More Than One Lifetime Gift from OSO Systems Synthesis Team.

[63] "All Donations with Type," On Site Opera.

However, the number of donors who have given consistent, recurring gifts over the last five years is just five, representing less than 1 percent of OSO's total donors.[64] This is the gap OSO seeks to fill: how does it convert these additional 29.85 percent of donors who've given multiple gifts into consistent, recurring donors? How does it convert the additional 25.2 percent of donors who have given in the last 18 months, and are considered "active", into consistent, recurring donors?

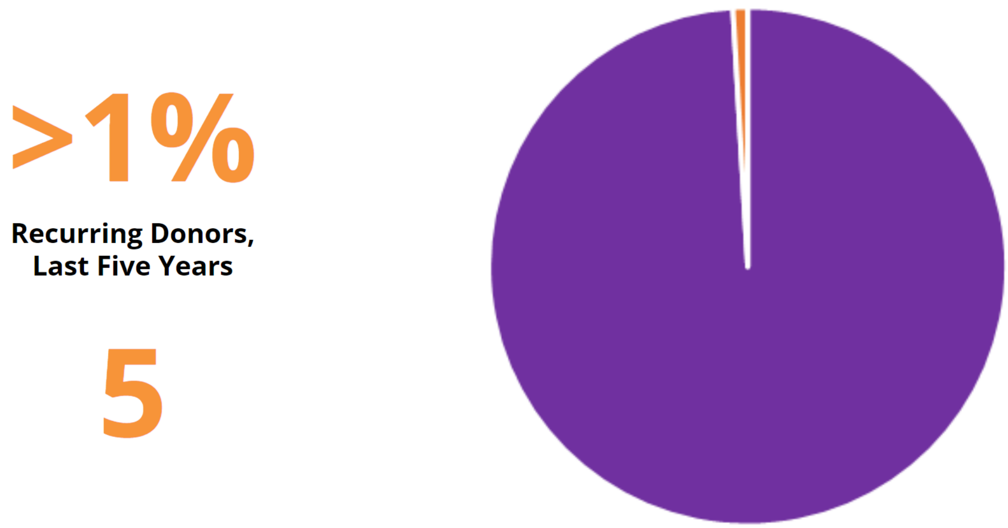

Figure 4.6: Recurring Donors over Last Five Years from OSO Systems Synthesis Team.

[64] "All Donations with Type," On Site Opera.

4.2 Financial Analysis

On Site Opera is considered a mid-size nonprofit,[65] with combined net assets and expected income of just over $1 million.[66] Its fiscal year runs from January 1 to December 31. OSO's financial position is leveraged heavily on contributed income. Of its $1,128,622.50 in projected income for FY 2022, 93.89 percent, or $1,059,650, is projected to come from fundraising.[67] This projection relies on OSO's projected return on investment (ROI) from fundraising remaining high. Against its $1,059,650 in projected fundraising revenue, OSO predicts fundraising expenses of only $66,463, for an ROI of $15.94 per dollar spent.[68] However, OSO has only projected $22,242.73 of net revenue, indicating that fundraising cannot fall short of budgeted expectations in order for OSO to achieve a profit.[69]

Additionally, OSO has indicated that it has not yet had to budget for a deficit thanks to consistent pledge payments made during a major 2019 pledge drive. This is a notable positive financial situation for the organization as OSO can reasonably go forward expecting that it can collect on pledges.

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[65] Francie Ostrower, "Boards of Midsize Nonprofits: Their Needs and Challenges." *Urban.org*, Urban Institute National Study of Nonprofit Governance (The Urban Institute), May 2008, https://www.urban.org/sites/default/files/publication/31681/411659-Boards-of-Midsize-Nonprofits-Their-Needs-and-Challenges.PDF.

[66] "FY 2022 Budget APPROVED," On Site Opera, 2022.

[67] "FY 2022 Budget," On Site Opera.

[68] "FY 2022 Budget," On Site Opera.

[69] "FY 2022 Budget," On Site Opera.

However, this raises a significant question of sustainability, as the amount of funds pledged to OSO in recent years has declined since their pledge drive in 2019. Figure 4.7 shows the yearly dollar amounts pledged to OSO as of February 2022 and includes information since the organization's inception.[70]

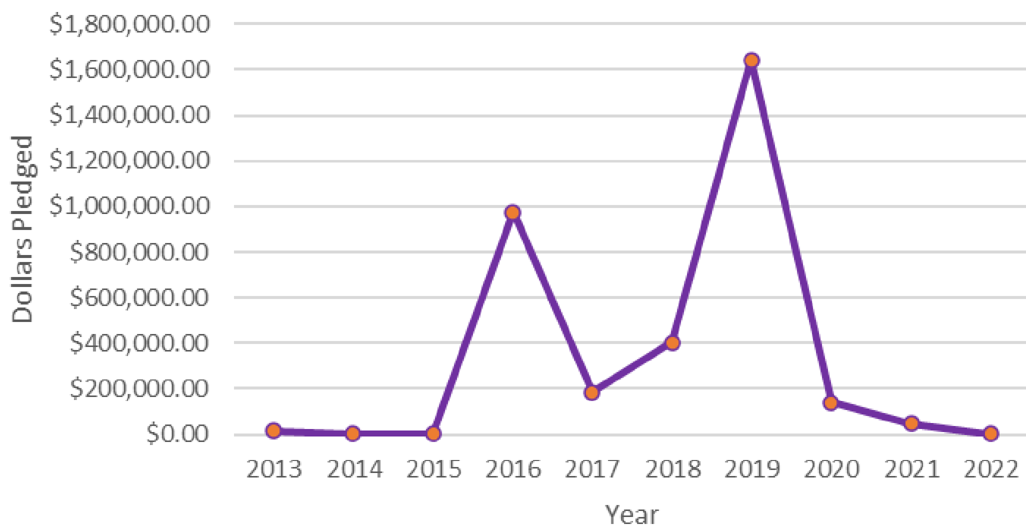

Figure 4.7: New Dollars Pledged By Year from OSO Systems Synthesis Team.

As indicated in figure 4.7, pledges have decreased precipitously. New pledges have decreased from an organizational high of $1,634,974.82 in FY 2019 to $47,205.30 in FY 2021, which was the last completed fiscal year.[71] This is a decrease of approximately 93.17 percent year-over-year.

4.2.1 Financial Analysis Summary

On Site Opera entered 2020 on track for growth. On Site Opera had just received its highest amount of yearly pledged dollars ever, with a decreasing percentage of its contributed income coming from its largest donor. However, as has been the case with many not-for-profit arts organizations, COVID-19 put a stop to much of OSO's growth. New pledges have decreased, the number of recurring donors has remained stagnant, and the number of new donors has precipitously declined. As OSO looks ahead, it will be imperative that its fundraising practices align with its mission, vision, and values, and are situated and executed to ensure the organization's survival amidst potential financial turmoil across the arts industry due to post-COVID-19 fallout.

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[70] "All Donations with Type," On Site Opera.

[71] "All Donations with Type," On Site Opera.

4.3 Contributed Income Audit

On Site Opera, as a nonprofit arts organization, receives contributed income in the form of donations to offset its necessarily high costs relative to modest earned income. In order to better understand how this contributed income affects OSO's financial position, the team undertook an audit of OSO's contributed income program, analyzing both contributions as a subset of OSO's total revenue, and the composition of donations to OSO by revenue stream.

The team's development audit was conducted utilizing both financial data provided by OSO, as well as publicly available financial data. These documents included OSO's FY 2022 Development Planning Calendar and Budget, Operating Budgets from FY 2019 - FY 2022, audited financial statements from FY 2020 and FY 2019, OSO's Board Resource Commitment Form, 2019 donor benefits summary, engagement emails and acknowledgement letters, results of a 2022 fundraising event survey conducted by OSO, and OSO's Forms 990 from FY 2018 - FY 2020.

OSO's contributed income has fluctuated in recent years and seems to be steadily rebuilding itself after a massive decrease due to the effects of COVID-19. Table 4.1 details the history of OSO's contributed income (CI):

Table 4.1: Contributed Income Analysis by Fiscal Year from OSO Systems Synthesis Team.

Fiscal Year	CI as % of Revenue	CI % w/o Restrictions	CI % w/Restrictions
FY 2018	93.52%	43.24%	56.76%
FY 2019	89.32%	14.99%	85.01%
FY 2020	51.61%	80.09%	19.91%
FY 2021	87.89%	N/A	N/A
FY 2022 (*projected*)	93.89%	N/A	N/A

Table 4.2 provides additional information showing changes in contributed income to OSO by category over the last five fiscal years.

Table 4.2: Contributed Income by Constituency by Fiscal Year from OSO Systems Synthesis Team.

Fiscal Year	Government	Foundations	Corporate	Individuals	Special Events, Net
FY 2018	$26,242	$632,500	$166	$153,493	$92,018
FY 2019	$37,733	$1,073,545	$28	$277,742	$104,300
FY 2020	$26,450	$70,091	$2,750	$167,183	$0
FY 2021	$41,570	$400,050	$1,423	$127,591	$36,000
FY 2022 (*projected*)	$57,500	$485,000	$5,025	$373,900	$142,100

The following sections detail the components of each contributed income program stream and analyzes how each one contributes to OSO's current financial position.

4.3.1 Individual Giving

On Site Opera's individual giving program is historically focused on major gifts. As of FY 2022, two major campaigns, a spring campaign and an annual gala, are planned to bring in most of the contributed income. The focus of major gift solicitation is on the annual gala rather than the spring campaign, meaning the majority of resources are focused on the gala. However, OSO's development plan does not include information on prospecting or cultivation and there is no specific plan for major gift cultivation during the summer when OSO holds its annual spring campaign.

The spring campaign timeline highlights OSO's interest in recurring gifts as this is the only time there is a planned focus on recurring gifts in the development plan. However, the spring campaign and end-of-year appeals only have two months of preparatory work time assigned to each, which is well below the standard timeline for a major campaign.

Outside of the campaigns, OSO only plans for active individual giving asks in May, June, November, and December. This is potentially due to the busy institutional giving calendar during those months, but it also shows that individual giving asks tend to only line up with campaigns. There seems to be no particular structure set for asks outside of these formalized campaigns. When donors do receive a solicitation and make a gift, OSO shows gratitude toward them. However, OSO highlights a specific timeline for showing gratitude to donors, which indicates that thank you's and acknowledgment letters do not happen automatically.

Finally, most of OSO's prospecting work is done via word-of-mouth introductions and references by friends of friends. There is currently no codified policy for prospecting, nor for cultivation.

4.3.2 Institutional Giving

On Site Opera's institutional giving program is strong, with government and foundation giving making up 51 percent of OSO's yearly contributed income.

4.3.3 Special Events

On Site Opera solicits sponsorships for its gala from its major gift donors. There seems to be no distinction between gala solicitation and major gift solicitation, indicating that there may be an opportunity for additional income via targeted solicitation.

Aside from the gala, OSO's other major event is the spring campaign, which culminates in a benefit party that occurs in June. However, the campaign and benefit are two months after the major gala. This could lead to donor fatigue caused by participating in a major giving drive in the spring followed by being asked to participate in a campaign that culminates in the summer. Many major donors also travel out of New York City during the summer, further contributing to the challenges presented to donors with this event's schedule.

4.3.4 Corporate Giving

There is little to analyze regarding OSO's corporate giving program, as there has historically been very little movement in this arena. Fiscal year 2019 was OSO's largest year for corporate philanthropy and brought in only $2,750.

4.4 Internal Analysis Summary

On Site Opera has shown consistent levels of success in certain areas of fundraising and management but has yet to show signs of sustainable growth practices outside of major gifts.

On Site Opera's average donor is generally from New York City, gives once to the company at an amount less than $500, and is unlikely to give multiple times. This donor is also likely to have given for the first time within the last three years. Upon closer inspection, the low number of consistent, recurring donors severely limits OSO's capacity for growth. Likewise, cultivation becomes difficult, as donors are not engaging with the organization through gifts over multiple years. While the organization has a strong major donor pipeline structure, this structure seems underutilized for successful prospect conversion between donor levels. The low level of recurring donors also shows that, while OSO's lifetime donor base is primarily small and mid-level donors, they are not engaged and consistent donors, meaning the pool of "active" small and mid-level donors is quite small.

The lack of engaged donors, especially small and mid-level donors, leads to a potential for future financial instability. While OSO has yet to budget at a deficit in recent years, new pledges to the organization have decreased by over 93 percent. A consistent decrease in new pledges year-over-year is concerning from the standpoint of long-term financial sustainability. Without new pledges, OSO will soon have to begin budgeting at a deficit as there can be no cash flow from pledges without receiving new pledges. Currently, OSO predicts its highest ever levels of contributed income in FY 2022. The data gathered does not support this conclusion, but it is indeed possible with systematic growth.

In short, OSO predicts a bright future. However, from the team's analysis, the data shows that structural, systemic processes must be implemented in order to develop a sustainable pipeline of individual and institutional funders with a focus on new, consistent, recurring donors at all levels but especially those small and mid-level donors.

Chapter 5: Literature Review: Donor Relationships

The relationships an organization has with its constituency are central to its success. From a fundraising perspective, understanding donors and supporting mutually-beneficial relationships strengthens an organization's ability to cultivate and steward donors. The team discovered during the internal analysis of On Site Opera (OSO) that while the majority of its lifetime donor base is small and mid-level donors, only a small percentage of this base is considered "active". With a low level of consistent, recurring donors, OSO is inhibiting its ability to cultivate a sustainable base of engaged donors.

Reflecting on this gap, the team conducted a second literature review to understand the many ways that relationships are built with donors, and to examine key facets behind strong donor relationships, including what motivates donors to give and drivers for donor loyalty. The team also assessed the ways in which donors engage with an organization and how engagement levels can be utilized to personalize communication and build relationship pathways. Finally, the team reviewed the subscription giving model as a framework for retaining and cultivating individual donors into an engaged base of recurring donors.

5.1 Donor Motivation

Donor motivation and donor loyalty go hand in hand. Adrian Sargeant and Elaine Jay in their book *Building Donor Loyalty: The Fundraiser's Guide to Increasing Lifetime Value,* explore how fundraisers can leverage both donor motivations and loyalty to increase retention rates and overall lifetime giving from donors. They state that "Donors remain loyal only if the organization continues to offer them the tangible or emotional benefits that they seek in return for their giving."[72] Therefore, understanding donor motivations is the first step in building a loyal donor base.

Sargeant and Jay identify several overarching reasons why donors choose to give. These can be divided into two categories: motivations based on self-interest and motivations based on donor emotions.[73] By understanding these donor behaviors, fundraisers can communicate more effectively with donors and encourage retention and loyalty.

First, Sergeant and Jay explore motivations related to self-interest. Self-interest versus altruistic motivations for giving has been an ongoing debate. Historically, economists argued that donors make "rational decisions" about what organizations to give to, which fails to address giving by anonymous donors or those who don't receive any obvious

[72] Adrian Sargeant and Elaine Jay, *Building Donor Loyalty: The Fundraiser's Guide to Increasing Lifetime Value* (John Wiley & Sons, Inc, 2004) 28.
[73] Sargeant and Shang, *Fundraising Principles and Practice*.

benefits for giving.[74] Recently, economists have said that gifts can come not only from rational decision-making but also from a "desire to increase [a donor's] material, emotional, and spiritual well-being."[75] Regardless of whether a donor is acting entirely due to altruism or not, there are several subcategories of self-interest benefits that fundraisers should consider:

- *Self-Esteem*: Giving makes the donor feel better about themselves.
- *Atonement for past sins*: The donor gives to make up for some past transgression.
- *Recognition*: Donors give in order to receive recognition from the organization, their family, peers, or community.
- *Service*: The gift provides help to a worthy beneficiary.
- *Reciprocity*: A donor gives in return for assistance that was received in the past.
- *In Memoriam*: The gift is made in honor or in memory of a friend or loved one.
- *Taxation*: The donor receives tax incentives for donating.[76]

These cover both tangible and intangible benefits that a donor may consider worth their donation to a particular cause.

Emotional responses can also be powerful motivators. These emotions are commonly identified as empathy; sympathy; social justice; fear, pity, or guilt; or conformity to social norms. Empathy occurs when a donor is motivated to give by their distress at the suffering of others.[77] Sympathy occurs when a donor is motivated to give when they feel it is "inappropriate for the beneficiaries to be suffering in the manner shown."[78] Social justice can be a motivator when a donor feels that a just world is endangered; they contribute in order to help right a social wrong.[79] Fear, pity, or guilt, used together or alone, can positively impact donor giving. However, care must be taken not to engender these emotions too much, otherwise, the donor will avoid the communication from the organization and be dissuaded from giving.[80] Finally, conformity to social norms can basically "peer-pressure" donors into giving or giving more. Studies have shown that a donor, when presented with a fictitious list of others who donated to an organization, was more likely to also donate and at higher giving levels than before.[81]

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[74] Sargeant and Shang, *Fundraising Principles and Practice*.
[75] Sargeant and Shang, *Fundraising Principles and Practice*.
[76] Sargeant and Shang, *Fundraising Principles and Practice*.
[77] Sargeant and Jay, *Building Donor Loyalty: The Fundraiser's Guide to Increasing Lifetime Value*.
[78] Sargeant and Shang, *Fundraising Principles and Practice*.
[79] Sargeant and Shang, *Fundraising Principles and Practice*.
[80] Sargeant and Shang, *Fundraising Principles and Practice*.
[81] Sargeant and Jay, *Building Donor Loyalty: The Fundraiser's Guide to Increasing Lifetime Value*.

Understanding the ways in which donors are motivated to give directly impacts the ways in which organizations communicate their missions. Through these communications, organizations can build donor loyalty that drives retention rates and greater lifetime giving.

5.2 Donor Loyalty

Along with this understanding of what motivates donors to give, it is also critical for an organization to understand the determinants behind donor loyalty. Building a loyal donor base provides immediate value, as it reduces an organization's need to find replacements for donors who have lapsed. As shared in chapter 3.3, this is especially important as it is estimated to cost as much as 10 times more to acquire a new donor than to retain an existing one.[82] It is estimated that a "10 percent improvement in attrition can yield up to a 200 percent increase in projected value, as with lower attrition significantly more donors upgrade their giving, give in multiple ways, recommend others, and, ultimately, perhaps, pledge a planned gift to the organization."[83] With small increases in donor loyalty, an organization can see significant improvements in the lifetime value of their donor base and bring more efficiency to their fundraising activities.

However, not all donors who give to an organization on a regular basis should be considered loyal. With varying motivations for giving, donors can be divided into two loyalty types: passive and active. Donors who are passively loyal may be motivated to give due to social pressure or benefits offered in exchange for their gift. With a passive loyalty to an organization, these donors are far more likely to lapse or be lured away by the promise of greater rewards. In contrast, active loyalty is when donors "believe passionately in the cause, identify with the values and ethos of the organization, and regard their support as an essential component of their personal or household budgets."[84] To foster active loyalty, organizations should enhance their donors' trust and develop shared values as a way to deepen their commitment.

An essential element of donor loyalty, and by extension a driver for donor retention, is donor trust, or "the belief that the nonprofit is making efficient use of its funds and having a positive impact on people for whom the funds were intended."[85] To strengthen a donor's trust, organizations must ensure they are behaving ethically and in accordance with the organization's mission;[86] delivering on any promised benefits to the donor or to a beneficiary group; and communicating the "achievements of the organization and, where possible, relate these to the individual contributions" made by donors.[87] Further, using

[82] Love, "3 Reasons."
[83] Adrian Sargent, "Donor Retention: What Do We Know & What Can We Do About It?." Non Profit News | Nonprofit Quarterly, August 15, 2013, https://nonprofitquarterly.org/donor-retention-nonprofit-donors/.
[84] Sargeant and Jay, *Building Donor Loyalty,* 6.
[85] Keith MacMillian et al., "Relationship Marketing in the Not-for-Profit Sector: An Extension and Application of the Commitment-Trust Theory," *Journal of Business Research* 58, no. 6 (2005): 810.
[86] Sargeant and Jay, *Building Donor Loyalty,* 48.
[87] Sargeant, "Donor Retention."

values-based messaging in communications helps to deepen a donor's knowledge of the organization and form a sense of connectedness to a set of shared values. Reinforcing these shared values is an excellent way to tap into donor motivations, and serves to present the organization as an authentic and trustworthy recipient of support.

Another critical element of donor loyalty is commitment. Donor commitment speaks to the strength of a donor's relationship with an organization. Committed donors are "likely to remain loyal even when the quality of service is not optimal or when there is negative publicity about some aspects of the organization's work."[88] Commitment is formed through the experiences a donor has with the organization. Drivers of donor commitment include satisfaction and the perceived quality of services offered; a sense of respect a donor receives through a timely thank you and personalized communication; and a personal connection to an organization's mission. Commitment can be strengthened by donor involvement, since "the greater the number of ways in which an individual engages with a nonprofit the greater the degree of commitment they will feel."[89] This could include volunteering, attending events, or introducing others to the organization. Engagement may also be reinforced through two-way interactions where donors are invited to share their communication preferences or offer their feedback through donor surveys.

With both trust and commitment, an organization must ensure meaningful engagement with donors at all levels and avoid purely transactional relationships. Donors need to be engaged in a genuine dialogue that deepens over time and helps to align them with shared organizational values. If loyalty is the key to the development of lifetime value, then it's important to understand these drivers of donor behavior and create relationships and engagement strategies that encourage a donor to bond with the organization and its mission.

5.3 Donor Engagement

As is clear from the previous two sections, a *loyal* donor is an *engaged* donor. The success of an organization's ability to retain donors is directly linked to the level of engagement it fosters with its constituency. While the term 'donor engagement' is interpreted in many ways, donor engagement is defined in the most basic terms as the extent to which a donor interacts with the organization they support.[90] It is important for fundraisers to regularly create opportunities for donors to engage with the organization beyond financial giving.[91]

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[88] Sargeant and Jay, *Building Donor Loyalt*y, 48.
[89] Sargeant and Jay, *Building Donor Loyalty*, 49.
[90] "What Is Donor Engagement and How Is It Measured?." GivingLoop Blog, October 26, 2019, https://www.givingloop.org/blog/what-is-donor-engagement-and-how-is-it-measured/.
[91] Derrick Feldman, "What Does It Really Mean to Be an Engaged Donor?." Philanthropy News Digest (PND), accessed March 15, 2022, https://philanthropynewsdigest.org/features/the-sustainable-nonprofit/what-does-it-really-mean-to-be-an-engaged-donor.

The greater number of ways a person interacts with a nonprofit the greater degree of commitment and loyalty they will feel towards that organization.[92]

Following this line of thinking, the measure of how engaged an organization's donor base is can be a useful indicator to assess the effectiveness of its fundraising strategies for cultivating loyalty.[93] While there are abundant ways in which donors interact with an organization, there are a handful of easily measurable indicators of donor engagement. These include:

- *Number of Events Attended:* This measure is particularly important for performing arts organizations. Showing up at performances and special events builds commitment and a sense of attachment to the organization while declining rates of attendance are often an indicator of declining interest in the organization's offerings.
- *Response Rate to Communication*: This includes responses to surveys and emails, and levels of interaction across social media accounts.
- *Hours Spent Volunteering*: Volunteerism expands an organization's capacity and provides additional opportunities for the cultivation of meaningful connections.
- *The Amount and Frequency of Gifts*: One of the easiest ways to track donor engagement is to monitor the frequency and size of a donor's financial contributions.[94]

An awareness of the levels of engagement across an organization's donor base can help inform more efficient allocations of limited time and financial resources.[95] Tracking engagement can also assist in the segmentation of donors into meaningful categories that drive communication strategies. By adapting communications based on the level of a donor's engagement, organizations can focus on donors they know are interested in increasing their involvement rather than expending limited resources on uninterested or lapsed donors.

Another effective tool for measuring engagement and better curating communications is to survey donors themselves about how they would like to be engaged. By inviting donors to take an active role in crafting their own communications, fundraisers can better understand their motivations and create touchpoints that create the most value.[96] By regularly surveying donors' needs and preferences, organizations can create "two-way relationships'' with their supporters. These mutually beneficial interactions can encourage

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[92] Adrian Sargeant, "Relationship Fundraising: How to Keep Donors Loyal." *Nonprofit Management and Leadership* 12, no. 2 (2003): 177–92, https://doi.org/10.1002/nml.12204.
[93] "What is Donor Engagement and How is it Measured?," GivingLoop.
[94] "What is Donor Engagement and How is it Measured?," GivingLoop.
[95] Feldman, "What Does It Really Mean?"
[96] Sargent, "Donor Retention."

donor commitment by sending a message that the organization is interested in its donors' views, and wishes to have a long-term relationship with them.[97] An organization seeking to facilitate higher levels of loyalty should regularly check in with its donors' evolving behaviors to improve the organization's communications and update donor segmentation.

For the attentive fundraiser, identifying the levels of interest and engagement for major donors and those who are regularly involved with the organization is fairly straightforward. Because the relationship is already established, the process of deepening their involvement is simply a matter of thoughtful and appropriately timed solicitations.[98] However, this same level of contextualization is not possible with a newly recruited donor. Those who have for some reason or another cared enough about an organization's cause to make a donation for the first time, but do not yet have a relationship with the organization, require a differentiated level of care. Before first-time donors reach higher levels of engagement, many organizations are using "welcome cycles" in an attempt to secure the all-important second and subsequent gifts.[99] For the first twelve to eighteen months after the first gift, individuals receive a personalized sequence of communications geared toward educating them about the organization's cause and inviting responses to initiate introductory conversations. If prospects can be persuaded to give at least twice, research shows that they begin to perceive that they have a relationship with the organization, one which they are increasingly willing to develop over time.[100]

5.4 Subscription Donors

A growing trend in individual donor appeals is subscription giving. Subscription donors are individuals who pledge their giving on a recurring basis, most commonly through monthly donations. By spreading their giving across many months, subscription donors are typically able to give more in a year than they could with a one-time donation. Through their sustained giving, studies have shown that subscription donors are over five times more valuable than one-time donors.[101]

As shared in chapter 3.3 of this report, the average year-over-year donor retention rates for the nonprofit sector are only 46 percent, whereas average subscription donor retention rates are considered to be significantly higher at 90 percent.[102] With a higher retention rate, subscription giving programs help to support an organization's long-term planning by providing a stable picture of donations that could be reasonably expected over the course

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[97] Roger Bennett and Anna Barkensjo, "Causes and Consequences of Donor Perceptions of the Quality of the Relationship Marketing Activities of Charitable Organisations," *Journal of Targeting, Measurement and Analysis for Marketing* 13, no. 2 (January 2005): 122–39.
[98] Sargeant and Jay, 17.
[99] Sargeant and Jay, 17.
[100] Sargeant and Jay, 17.
[101] Ben Cipollini et al., *The State of Modern Philanthropy: Examining Online Fundraising Trends* (San Diego, CA: Classy, 2018).
[102] Jay Love, "The State of Donor Retention in One Image," Bloomerang, February 16, 2022, https://bloomerang.co/blog/the-state-of-donor-retention-in-one-image/.

of the year. Further, subscription donors demonstrate a high level of commitment to the organization through their sustained giving and present an opportunity to engage occasional donors through constant stewardship.

Subscription giving programs can “bridge the gap between community-building and individual organizational support.”[103] However, reaching these subscription donors requires a different approach than what is commonly used for regular appeals, which are often more urgent and need-focused. While subscription giving appeals also center the organization’s needs, the communicated value proposition should be relationship-focused, and express the impact sustainable funding provides the organization, making the donor feel connected and engaged.

With consumer behavior shifting towards a digital economy, donors are increasingly more comfortable with multi-channel engagement and subscriptions to online services. This is especially indicative of subscription donors, who show a higher adoption of new tools for giving and a preference for digital channels.[104] Unlike larger one-time gifts, which are frequently made via a check, donors who give subscription gifts are more likely to utilize online payment methods, such as credit cards or ACH transactions. And though younger generations of “digital natives” are prime targets for subscription giving, a 2022 survey conducted by Indiana University Lilly School of Philanthropy found that 62 percent of subscription donors were aged 55 or above, showing the potential to engage donors of all generations in subscription giving.[105]

When surveyed, subscription donors indicated these three top *motivating* factors behind their reason for signing up: the greater sense of impact on the organization’s mission; the ease of giving; and the direct ask by the organization to join their subscription giving program.[106] For those non-subscription donors who were surveyed, they indicated these three top *influencing* factors that would encourage them to sign up for subscription giving: the organization’s mission; a relationship with the organization’s staff; and the ability of the organization to grow and adapt in a changing environment.[107]

In implementing a successful subscription giving program, it is critical to keep these donor indicators in mind. Subscription giving appeals that require too much personal information or have unclear language hinder the “ease of giving” that is so valued by subscription donors. Using the same communications or lumping appeals with one-time donors also hinders subscription donor engagement; it is not clearly communicating the direct impact of subscription donors’ gifts or building a personalized relationship with this sustainable

[103] Tim Sarrantonio, “Research Validates Importance of Recurring Giving,” NonProfit PRO, January 7, 2021, https://www.nonprofitpro.com/post/new-industry-research-validates-importance-of-recurring-giving/.
[104] “The Giving Environment: New Models to Engage Donors.” IUPUI.edu, Indiana University Lilly Family School of Philanthropy, January 2022, https://scholarworks.iupui.edu/bitstream/handle/1805/27564/NewModels2022.pdf.
[105] “The Giving Environment,” Indiana University Lilly Family School.
[106] “The Giving Environment,” Indiana University Lilly Family School.
[107] “The Giving Environment,” Indiana University Lilly Family School.

base of donors. Regularly thanking subscription donors helps to reinforce the lasting value of their ongoing support and provides an opportunity to share exclusive content, such as impact stories or program updates, that deepen a donor's connection to the organization.

To encourage participation in a subscription giving program, organizations must be direct in their call-to-action, explicitly asking donors to switch to subscription giving and explaining the ways this impacts the organization and its mission. For one-time donors, organizations should consider sending a post-donation appeal to build on the momentum of a recently engaged donor and encourage them to consider upgrading to a subscription gift. As noted above, a “relationship with the organization’s staff” is a potential influencing factor behind a donor’s decision to participate in a subscription giving program. By leveraging staff and board relationships, an organization could develop a cultivation plan that highlights the personal stories from these key stakeholders, demonstrating their experience within the organization and dedication to the mission.

A subscription giving program presents a valuable opportunity for an organization’s long-term development goals, both in its potential for increasing individual giving and for building an engaged community of donors. By cultivating these sustaining relationships, an organization can improve its donor retention rates and increase its potential to steward these donors into major or planned givers. However, to create these valuable donor relationships, an organization must first present a clear call-to-action to encourage donors to switch to subscription giving and then maintain those relationships by keeping donors engaged through personalized communication that speaks to the impact of their giving.

5.5 Donor Relationships Summary

As discussed in this literature review, a donor’s motivation or their level of loyalty and engagement can play a role in their affinity for an organization. By developing a deeper understanding of one’s donor base, an organization can increase retention rates and the overall lifetime giving from donors. Knowing what motivates a donor to give can assist in crafting effective solicitations, and knowing what drives donor loyalty can decrease donor attrition and help to cultivate recurring donors. Additionally, the more ways that a donor engages with an organization, the longer they will stick around. By tracking engagement and curating communication based on involvement and interest levels, organizations can better allocate their resources toward cultivating loyalty. Building an engaged community of donors can be a useful development framework. With subscription giving models, an organization can encourage recurring gifts while cultivating sustainable relationships with a group of loyal donors.

Chapter 6: External Analysis

While conducting an internal analysis gave the team insight into the operations of On Site Opera (OSO), an external analysis gave perspective about the organization as perceived by its stakeholders and in relation to other aligned nonprofits. As part of the external analysis, the team conducted stakeholder interviews with a sampling of OSO's patron base. With the knowledge gained from these interviews, the team developed empathy maps that correlated with attitudes surrounding donor engagement. Finally, the team looked outward at other site-specific performing arts organizations through a national benchmarking process to understand how different policies and practices at comparable organizations may be used to inform recommended strategies for OSO.

6.1 Stakeholder Interviews

Interviewing individual donors who were familiar with OSO was a main methodology for the team's research. While general information from the field regarding donor motivations provided the team with a framework to guide future research, hearing about motivations for giving directly from currently engaged donors provided insight into the unique OSO donor base which the team would hope to target with the final recommendations.

The team began the interview process by conducting research on the rationales behind donor interviews and on the types of questions often asked in such interviews. Then, a set of questions, included in the following section 6.1.2, was created for the interviews along with a protocol to make sure each interview followed the same set of standards. Next, the team completed the interview process with seven stakeholders and synthesized the findings to identify conclusions that would inform the donor empathy mapping exercise and final recommendations.

6.1.1 Rationale

As the team looked to better understand OSO's donors, it became clear that conducting a set of interviews to uncover what motivates its particular donors was an important step in the research process. To begin, the team looked into best practices and rationales for conducting donor interviews.

Donor interviews serve two main purposes. First, they are a tool for donor retention as donors feel special and engaged when they are asked to share their perspectives with the organization. Second, they are a great recruitment tool as the organization can refer to language already utilized by donors to bolster new donor recruitment efforts.[108] In addition to these two main purposes, donor interviews also provide an opportunity to explore the

[108] "Donor Interviews: Who, What and Why to Ask." Wired Impact, March 24, 2021, https://wiredimpact.com/blog/donor-interviews-who-what-why/.

use of donor personas. Donor personas are fictional representations of a typical member of an organization's group of donors and are rooted in behavioral data and knowledge gained from personal interactions like interviews.[109] By outlining the motivations, aspirations, and behaviors of a segment of an organization's supporters, donor personas enhance outreach strategies by allowing fundraisers to create more targeted communications.[110] Talking to donors within each of the organizations' categorizations, such as recurring, one-time, or major givers, can provide insight into the kinds of engagement each category wants to experience.[111]

6.1.2 Process

Once it was established that donor interviews would be a useful tool for learning more about OSO's particular donor base, the team researched best practices for conducting the interviews. Detailed information exists to provide insight on what kinds of questions to ask and what protocol should be used.

The first step involved creating a list of questions that would allow the team to better understand donor motivations and donors' feelings about giving their time, money, and/or expertise to OSO. When approaching questions, the team found that it is important to ask questions that engage the donor in talking about their values and beliefs and encourage an emotional response.[112] Questions asking about their involvement with the organization, their communication style, and their reasons for choosing the organization were important questions identified for the interview process. After brainstorming questions based on samples and the team's own curiosity, the following questions were posed to each of the interviewees:

- Generally speaking, what motivates you to give your money, time, or expertise to On Site Opera or any other organization you may support?
- Why specifically did you decide to support On Site Opera? What does OSO offer that you cannot get elsewhere?
- How would you describe On Site Opera and its mission to a potential donor?
- What of OSO's communication do you enjoy the most? Has something that you saw from OSO or that they sent you inspired you to give, either recently or at some point in the past?

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[109] "Defining Donor Personas Is a Fundraising Best Practice." Sidekick Solutions, accessed March 23, 2022. https://www.sidekicksolutionsllc.com/defining-donor-personas-is-a-fundraising-best-practice.
[110] "How to Maximize the Value of Your Donor Persona Interviews." Image in a Box, accessed March 15, 2022, https://blog.imageinabox.com/donor-persona-interview-tips.
[111] "How to Maximize the Value," Image in a Box.
[112] Simone Joyaux, "23 Questions to Ask Donors and Prospects," Bloomerang, May 1, 2014, https://bloomerang.co/blog/23-questions-to-ask-donors-and-prospects/.

- Could you see yourself becoming more involved with this organization? How so? What would inspire that additional action?
- Do you have any advice for OSO to keep you as a supporter and inspire others like you to join their mission?

The systems team's process started by identifying candidates with the help of OSO staff and making introductions through OSO's Executive Director. Each donor was then sent a formal invitation by the team explaining more about the interview process which informed them that the interviews would be recorded with their permission and provided them with opportunities to schedule a 30-minute Zoom interview with a couple of members of the team. After scheduling and conducting each interview, the team members responsible for the interview held a short debrief session, documented takeaways from the conversation, and reviewed the transcript of the meeting utilizing Otter.ai. Once all of the interviews were conducted, the team synthesized the responses into overarching takeaways that ultimately helped inform the final recommendations.

6.1.3 Findings

In synthesizing the stakeholder responses, the team looked for common themes across the seven interviews. Findings from this research are highlighted here as four key takeaways, supported by select quotes pulled from the conversations:

1. Unique artistic programming is the driving force behind engagement.

   All of the interviewees were initially drawn to OSO by its innovative productions. While the OSO "brand" is clearly understood by those the team spoke to, their appreciation extends far beyond the novelty of the chosen locations. Many also expressed how impressed they've been with recent program offerings, both for the relevancy of the subject matter as well as the creative ways they could engage despite pandemic shut-downs. It is clear that the interviewees view OSO as a distinct player in the field and hold its artistic vision in high esteem.

   "Using space to create a new way of looking at things that makes it relevant."

   "The innovative format has been really, really wonderful…I like to see things that are different, innovative, have a lot of energy behind them, and show promise."

   "I have gone to a few OSO productions because that was one of the only things that was available during COVID. I wanted to do cultural things and they were very smart about how they went about things."

"It has felt as if in the last couple of years, they have responded to the world around them…And it seems like there's a genuine commitment to trying new things that are not just because it's an opera that they have never done before."

2. Accessibility is a key appeal.

   In addition to the innovative format of site-specific productions, interviewees shared that attending OSO shows felt more approachable than attending shows at revered institutions such as the Metropolitan Opera. Despite a few disclaimers about their lack of opera knowledge, everyone the team spoke to indicated that they have brought friends to OSO, and that affordable ticket prices and historic locations make it an easy sell to those who might be new to the genre.

   "The productions are accessible to so many different people, it's not what most people think of as opera, being something stuffy."

   "Companies like [OSO], frankly, make opera available to people who can't afford to go to the Met, and so that's important too."

   "They're innovative and they make you really feel like you're in the thing, even if you don't understand that much about music you can enjoy it."

   "They're trying to introduce opera to a wide array of people, from children to people who love opera in every different form. So I think they really are trying to expand outreach and bring joy to people."

3. Donors want to know the impact of their gifts.

   Many of the interviewees articulated that the primary reason they support OSO over larger organizations is because they felt as if a gift to OSO had a more meaningful and measurable impact on the organization. Even though New York City has many exciting artistic offerings deserving of support, donors expressed that donations to OSO seem to be the most useful. A key motivation for donors is knowing that their donation of time and money is valued, and many expressed this sentiment about their gifts to OSO. Others cited that while so many arts organizations of a similar size closed their doors during the pandemic, the fact that OSO not only survived but seemingly thrived gave them the necessary degree of confidence that a donation to OSO would be well stewarded. Finally, others wished that the specific impact of their gift was better articulated. Donors want to know the causes and values their money is supporting and wished that OSO did a better job of articulating that impact.

"I like to think that New York is the biggest and the best and the first of everything, and it's always exciting to be part of that… I like to put my energy where I really think it would be the most useful."

"[At other organizations where I volunteer], they're very attentive. They're very appreciative…and that makes me feel more willing to be involved because I know that my commitment will be honored."

"I give to organizations and charities that carry out or support the values that are important to me, things that I think are really crucial."

"I think we're all sick of giving to things that don't seem like they matter."

4. A lack of specificity in the call-to-action appears to be a barrier to deepening engagement.

   While many interviewees expressed that they would be willing to be more involved with the organization, either by increased participation or a higher amount of financial support, they were not sure what organizational needs their increased involvement could meet. One interviewee said that they have been giving financially at the same level for many years without ever being asked to increase their amount. Another said they would be happy to volunteer their time, but did not feel as if OSO had a need for volunteers. These trends indicate that donor appeals could be more specific and direct in their calls to action.

   "If I know that there's a specific need, especially if it's not just going to operations but some specific projects that they need support for, I might respond to that more than the annual appeal."

   "If I could be more helpful in introducing the organization to people…I think there's always more that I could do."

   "They could probably even push me more…[as a recurring donor] my giving level has stayed the same since I've started and maybe it's time to consider increasing my amount."

"Tell people what you need in your communications…a lot of people don't have money, but they have other stuff. They have other ideas. They know someone who knows someone."

6.1.4 Conclusions

While these interviews only present a snapshot of current stakeholder perspectives, they reveal key pieces of insight into how OSO is perceived by its patrons, the value OSO creates for its supporters, and the potential gaps in its communication strategies. Engaging directly with supporters helps leaders question their assumptions while creating space for individuals to express their opinions and needs. Regular donor interviews and surveys present an opportunity for OSO to engage with its donor base and facilitate higher levels of donor loyalty by better understanding why and how donors interact with the organization. The model this team set could form the basis for further engagement.

While the act of gathering donor feedback through interviews and surveys provides a pathway for two-way relationships, only genuine followthrough builds trust. When an organization chooses to seek out the opinions of its stakeholders, there must be a plan in place to ensure the feedback received is responsibly recorded and interpreted so that the lessons learned are not lost. The team explored the use of donor empathy mapping as a tool through which to collect and categorize the findings from these interviews and potentially identify a useful tool for OSO leadership to better understand what motivates their donors moving forward.

6.2 Donor Empathy Mapping

As explored in chapter 3.5, donor empathy mapping is a helpful tool borrowed from design thinking for organizing data and knowledge about donors into useful artifacts to drive donor-centric engagement strategies. Empathy maps are created through a process of guided brainstorming sessions with a cross-departmental team.[113] The goal of these sessions is to identify one or more donor personas that are unique to the organization and then draw together insights from both quantitative and qualitative research sources to build an understanding of each persona. Once the stakeholder interviews were complete, the team used this design thinking methodology to synthesize the findings and themes from those conversations through a collaborative brainstorming session with the client.

6.2.1 Rationale

Ineffectual donor engagement is often the product of a disconnect between the communications organizations think their donors want to hear and communications that

[113] Melody Song, "Methods and Processes: Donor Personas—Creating Donor Profiles With Empathy Mapping." Association of Fundraising Professionals, December 30, 2020, https://afpglobal.org/news/methods-and-processes-donor-personas-creating-donor-profiles-empathy-mapping.

actually elicit positive reactions. Creating compelling communications begins with matching messaging to the audience the organization is trying to reach. While every organization's donor base is a collection of distinct individuals with disparate motivations and behaviors, donor personas can help clarify the key messages that best align with the experiences of the majority of supporters.

In User Experience Design, the use of personas allows designers a more precise way of thinking about how specific groups of people behave and think, and what they want to accomplish and why. The rationale is that the more the designer knows about their users, the more effectively they will be able to cater their products to the needs and desires of the individuals they are designing for. Empathy maps help fundraisers achieve this same level of insight into how their organization's unique set of donors think and feel.[114] This empathy-based, data-driven tool clarifies why donors support organizations, or, more specifically, from which aspects of an organization's operations individuals derive the most value.[115] Simply put, donor empathy maps help fundraisers start thinking more like their donors.[116]

6.2.2 Process

The first step in creating donor empathy maps is to gather together all the research and internal knowledge an organization has about its donors. Facilitators of this process should collect data from organizational databases, recent surveys, and donor interviews. Once this information is readily available, the next step is to create collaboratively by drawing insights from multiple sources and departments to identify the most strategic segmentation of donors. Empathy mapping at its core should be an act of co-creation across teams and experiences that pinpoints the most accurate representation of who donors truly are.[117] Facilitated brainstorming sessions provide the space for entire teams to offer their unique perspectives from personal experiences with donors and this often reveals insights about donors the organization might not have previously considered. For the purposes of demonstrating this process for the client, the team facilitated a brainstorming session with OSO's Executive Director and Development Manager. However, this process is most effective when done with team members at every level of the organization including front-of-house staff, marketing personnel, and board members.

The team created a donor empathy canvas in Miro to provide a platform on which to record the ideas generated during the brainstorming session. The canvas first guides the brainstorming team through four focus areas about the donor persona, with prompts to inspire discussion.

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[114] Song, "Methods and Processes."
[115] Song, "Methods and Processes."
[116] Hannah Kallady. "How to Use Empathy Maps to Think Like Your Donors." Ntegrity, September 4, 2020. https://ntegrity.com.au/blog/empathy-mapping.
[117] Song, "Methods and Processes."

As shown in figure 6.1, the first quadrant investigates the demographics and psychographics of the donor persona and challenges the team to categorize the particular donor segment in terms of average age, income level, culture, and household makeup. Next, the team considers the donor's behaviors including how they donate, what they tell others about the organization, and any conflicts between what they say and do. Mirroring this quadrant are the influences that inspire this behavior. Finally, the fourth quadrant explores the donor's aspirations; the hopes and dreams that keep them up at night, what motivates them to give, and the issues they want to tackle. The pain and gain points serve as a platform to begin drawing conclusions from the insights emerging from the map about potential barriers to giving and the programs and messaging that most inspire support.

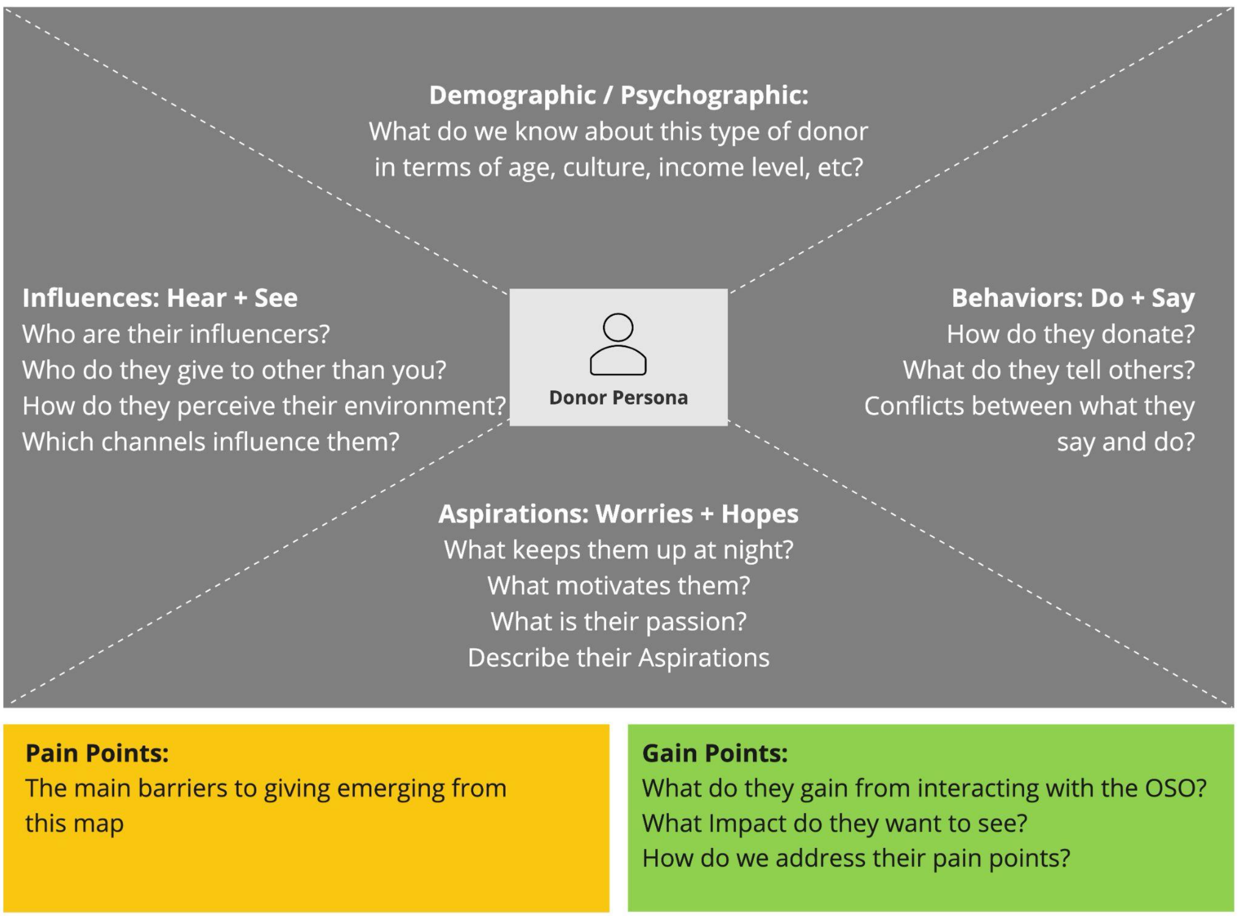

Figure 6.1: Donor Empathy Map adapted from the Association of Fundraising Professionals.

Once the canvas questions have been exhausted, the final step in the donor empathy mapping process is to refine the findings into key takeaways for future application.[118] The most valuable pieces of information to draw from the brainstorming sessions are:

[118] Kallady, "How to Use Empathy Maps."

- A summary of what is top of mind for this group of donors to help set the context for future content creation;
- Key pain points to address when crafting communications;
- A unique value proposition which summarizes why this group of donors should engage with the organization; and
- Key messages that unpack the value proposition

By taking the extra next step to distill the findings from brainstorming sessions into these four key takeaways, marketing and fundraising personnel can easily apply the insights in future communications.

6.2.3 Findings

For the purposes of the brainstorming session the team conducted with OSO staff, the donor persona the team decided to explore was the "socially motivated cultural consumer." The team decided to focus on this unique segment of OSO's donor base as a result of the insights gained about OSO's audience from client meetings and stakeholder interviews. This segment does not include long-time opera fans but focuses on young professionals and families with young children who primarily engage with cultural offerings as an escape from their busy work lives and an excuse to get out of the house. The Miro board from this brainstorming session is included in appendix C - 2.

As a result of the brainstorming session, the team identified that this unique segment of patrons values flexibility and accessibility. They are drawn to innovative and immersive experiences which provide a reprieve from the stressors of everyday life, encourage personal and collective reflection, and offer a place to bring friends and children. These donors are much more comfortable giving online and engaging in "quick philanthropy" than older generations but are typically inspired to give for vastly different reasons. The "socially motivated cultural consumer" is motivated to give to programming which engages topics relevant to current societal issues. Fair compensation for artists and education were also identified as key motivating factors for giving.

The key pain points the team identified for this persona included the cost of admission and whether or not they can fit an experience into their busy schedules. While these patrons enjoy attending shows with friends, they might hesitate to invite additional guests if the price of admission is too high. They also want their donations to go towards bettering society in meaningful ways. If they can't identify that alignment in values expressed by the organization, they often choose to give to impact organizations outside of the cultural sector.

6.2.4 Conclusions

Organizational strategies for donor engagement are often built on untested, one-size-fits-all assumptions about donors. By sourcing insight across teams from both quantitative and qualitative research, donor empathy mapping can provide the key to questioning these assumptions. Knowing what inspires commitment from supporters leads to case statements that center the donor's values and experiences. The process of identifying and synthesizing the unique motivations and aspirations of its donor base could help OSO better articulate the value the organization creates for its donors. The next step would be to facilitate this brainstorming process with more members of the OSO team to identify the most strategic personas and accompanying value statements for OSO's unique set of supporters. Once created, these maps should be reevaluated and updated from time to time as the organization's donor base evolves.

6.3 Benchmarking

One way for organizations to gain insight into their own practices is to reflect on how comparable organizations handle similar situations. It is through learning about different approaches that an organization can consider alternative processes that might be beneficial to its overall health. The way that many organizations make these comparisons is through benchmarking.

Benchmarking is the practice of comparing business processes and performance metrics from various organizations. The selection of these processes and metrics are dependent on what the goal of the benchmarking is or what new perspective is expected to be gained. Benchmarking is essentially used to understand where exactly an organization stands in the ecosystem in which it operates. Understanding what others do will illuminate what could be done differently by the organization, often for the purpose of improving or evolving. Business News Daily states, "The ultimate goal of benchmarking is continuous improvement, something all businesses should aim for. Comparing your business to others can help you generate ideas that you can adopt to get ahead."[119]

Understanding OSO's relationships, with donors and others, has been an important part of the team's research. Understanding how to strengthen these relationships between company and patrons to move beyond the paradigm of transaction has been the goal of much of the team's research. The goal of benchmarking in the context of this project was to better understand how other site-specific performing arts organizations built relationships.

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[119] Nicole Fallon, "The Benefits of Benchmarking in Business Operations." Business News Daily, November 19, 2021, https://www.businessnewsdaily.com/15960-benchmarking-benefits-small-business.html.

On Site Opera, as a site-specific opera company based in New York City, has a very unique position both in the artistic environment of New York and within opera spaces in general. Therefore, benchmarking required the team to look at the key attributes of OSO to properly make comparisons.

6.3.1 Rationale

Research into other performing arts organizations that lack a permanent venue helped the team understand how others have met similar challenges in engaging and acknowledging donors. The team laid out several problems that needed to be addressed in this portion of the research that would be helpful in making recommendations to OSO, as well as support other aspects of the team's prior research. These problems were summarized as:

- How an organization engages donors.
- How an organization engages community members.
- How an organization addresses accessibility needs in new spaces.

Once the team determined a baseline of what other organizations have done to solve these problems, the team was able to connect this research with previous takeaways from other methodologies. With this research, the team was able to build the recommendations.

6.3.2 Process

One of the challenges when building out the benchmarking framework was finding organizations that are similar enough to OSO. On Site Opera has a unique position in the industry—centering around opera performance in unusual spaces in the metropolitan and cultural ecosystem of New York City—and making comparisons can prove to be challenging. Therefore, the team selected several of OSO's key features to accurately gauge whether other organizations could be used as an example from which OSO could learn.

To begin the search for comparable performing arts companies, the team utilized online search engines. From there, the team began to go through websites and articles about companies that align with OSO's artistic programming as well as its values and mission. While this included theatre companies, there was an emphasis on looking at opera companies. This was achieved by using the OPERA America database. The team focused on major cities including New York, Los Angeles, and San Francisco where the artistic environment could be compared to the landscape in which OSO resides.

The team decided to visualize a comparison between organizations utilizing ten unique features in the form of a matrix, which is included in this report as appendix D-2. Each feature is described in detail below.

Location: Location simply refers to the city and state in which the organization resides and holds its tax determination. All of the areas for comparison are located in the United States including locations from New York City, NY, to San Francisco, CA.

Population: Population is a continuous variable describing the current population in each geographic area.

MSA Level: The Metropolitan Statistical Area (MSA) of each location falls into one of three categories defined by the team, based on the population of the city. Each city listed is categorized by the United States Census Bureau as a metropolitan area. In order to better compare the areas without knowing the exact population data, each city was assigned to 1 of 3 levels. Level 1 are cities with a population of less than 500,000, level 2 are areas with a population between 500,000 and 1,000,000, and level 3 are areas with a population greater than 1,000,000. This provides context for the area in which each organization operates.

Age <15 Years: Age refers to the founding year of each organization. On Site Opera was founded in 2012, therefore other similar organizations were sought that were around the same age. Fifteen years was chosen to give some leeway for choosing organizations that may be slightly older or younger than 10 years.

Non-permanent venue: Each organization is categorized by whether they have a transient business model based on not having a permanent venue space. All but one organization researched fit this criterion. The other benchmarked organizations perform in different locations within their given geographic area.

Site-Specific Work: Lacking a permanent venue and performing site-specific work have a key difference. While site-specific work often indicates that the organization does not have a permanent venue in which to perform, site-specific work is more about the content the organization presents. With site-specific work, the space chosen for presentation makes a comment about the work and often relates to a central theme in the piece. Site-specific work might also include non-traditional venues or public spaces whereas companies that do not have a permanent venue might rent conventional performing spaces.

Budget ~ $1,000,000: The budget of an organization often makes a large impact on the outreach and engagement that is feasible. In order to make adequate comparisons to OSO for the purpose of recommendations, the budget of the organizations must be approximately $1,000,000.

Values Publicly Available: One of the common practices for arts organizations is to include the mission statement and vision on their website for patrons to better understand the positioning of the organization. Another component that might be included on the website would be the organizational values. On Site Opera makes its values public, centering around elements of social justice, accessibility, and creating transformative work.

DEAI Statement Publicly Available: In addition to having values available on the website for patrons to view, another important feature of gauging the similarity of OSO and the benchmarking organizations was the featuring of a Diversity, Equity, Accessibility, and Inclusion statement on their websites. These statements often include actionable measures that the organization is taking to improve these issues internally.

Currently Active: Although not a critical part of our analysis, the status of the organization was important to note. Some of the organizations that were found during the initial wave of research were later found to be defunct, often due to the difficulties presented to performing arts organizations during the COVID-19 pandemic. However, the information that was present on their website at the time of research was valuable in building out the benchmark.

6.3.3 Selection

From this initial research, the team chose three organizations to focus on more deeply based on specific qualities. While creating the matrix was a beneficial tool in deciding which organizations to include in an expanded case study, it was not the sole decision-maker with regard to the organizations featured. Rather, it was used as a weighted element for making the decision. In the end, the decision was made by focusing on the three needs of our research question: how does the organization engage community members; how does the organization engage donors; and how does the organization address accessibility in new spaces.

One thing to note about this specific benchmarking process is that all of the case studies described herein are based upon publicly available information. All information was obtained using the company's website as well as 990 Forms and news articles about the organization.

6.3.4 Case Studies

Case studies are an excellent way for an organization to learn about current innovations in the field and decide how to adapt them to fit its particular needs. By utilizing the selection process outlined in the previous section, the following three case studies stood out as excellent examples of the different approaches OSO can take to engage its stakeholders. Each case study presented focuses on a different strength that can be learned from. Quantum Theatre employs effective strategies for events and community engagement, Opera Parallèle offers an interesting new way to approach donor tiers and connections with artists, and This is Not a Theatre Company exhibits new levels of accessibility to some of its unique site-specific work.

6.3.4.1 Case Study #1 - Quantum Theatre

Located in Pittsburgh, Pennsylvania, Quantum Theatre is a site-specific performing arts organization. Celebrating its 30th year in operation in 2021, Quantum Theatre describes itself through its mission as:

“A company of progressive, professional artists dedicated to producing intimate and sophisticated theatrical experiences in uncommon settings, exploring universal themes of truth, beauty and human relationships in unexpected ways.”[120]

In addition to the publicly available mission statement, the company also provides a written document about the philosophy behind the company, describing its nature as a “kind of laboratory, an incubator for the amazing.”[121]

Throughout its history, Quantum Theatre has utilized non-traditional spaces around the Pittsburgh area to present a variety of interesting plays that often relate to the venue in which they are performed. Quantum's repertoire ranges from retellings of Shakespearean classics such as *King Lear* to world-premieres such as *The Current War*, a musical based on the rivalry between Thomas Edison and George Westinghouse.[122] In the 2021-2022 season, the first in-person season since the COVID-19 pandemic, Quantum Theatre presented *An Odyssey* in Schenley Park, Lucy Kirkwood’s *Chimerica* in a former YMCA Gymnasium, and Will Arbey’s *Plano* in a former workshop space.

While operating a “home base” office in the neighborhood of East Liberty,[123] Quantum is transient in that it often does not produce productions in multiple seasons in the same neighborhoods of the city. However, Quantum makes a concerted effort to connect itself as an organization to the space and community in which it has taken up residence. This is established by the creation of several outreach programs. These programs include specialized performance add-ons such as a wine-tasting night, a pre-show gathering at a local restaurant, talkbacks, and even an event with a psychologist to unpack the themes of the artistic work.

But perhaps the program with the most direct impact on a more localized audience would be Community Night. Community Night is a special opening preview event for those who live in the neighborhood of the particular production, allowing residents to get a first look at a unique cultural experience that would not be possible without the community sharing part of its space. In addition to Community Night, Quantum seeks to establish a continued

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[120] “What We Are.” Quantum Theatre, accessed May 2, 2022, https://www.quantumtheatre.com/about/what-we-are/
[121] “What We Are.” Quantum Theatre.
[122] “*The Current War*.” Quantum Theatre, accessed May 2, 2022, https://www.quantumtheatre.com/currentwar/#:~:text=The%20Current%20War%20tells%20the,and%20Edison%20literal%20and%20electrified.
[123] “What We Are,” Quantum Theatre.

relationship with local Pittsburgh restaurants and bars. During the run of many shows, Quantum features a collaboration with eateries close to the performance venue, offering give-away tickets and discounts. These collaborations offer a symbiotic relationship in which both Quantum theater and partnering restaurants are uplifted.

This has also extended into NearBuy, a program that connects Quantum Theatre patrons with local restaurants in order to benefit the community. During the in-person season in the summer of 2021, Quantum Theatre was funded by the Richard King Mellon Foundation to host a program benefiting local food charities. If diners mentioned being friends of Quantum Theatre, up to $3,000 could be donated to organizations such as 412 Food Rescue and Feed the Hood that seek to alleviate food insecurity in Pittsburgh.

It is through programs like Near Buy and the off-stage events tied to its artistic productions that Quantum is able to connect with the community that serves as its home for the duration of a program run. Quantum Theatre has been part of the Pittsburgh theatre community for three decades and it recognizes the transformative power that such an organization can hold both on and off stage.

6.3.4.2 Case Study #2 - Opera Parallèle

Opera Parallèle is a young company that strikes a balance between producing traditional and contemporary works of the genre. Established in the San Francisco/Bay Area, fostering a creative and inclusive environment is one of the key tenants of the company. As per Opera Parallèle's website, its mission is to "merge tradition with innovation to re-invent the power of opera in our modern world" with the vision of "creating opera for our time."[124]

The mission and vision are reflected in the interesting work that Opera Parallèle has produced in the recent season. In 2021-2022, the season featured classics such as *La Belle et La Bete* and reflected on the LGBTQ+ history of the community of San Francisco by presenting a new piece *Harvey Milk*, celebrating the life of America's first openly gay elected official. The organization also connected with organizations that are reflective of its values and the greater community. In the past, Opera Parallèle has collaborated with The Transgender District, San Fransisco's Gay Men Chorus, and Ruth's Table. On its website, the organization states that it has a commitment to the BIPOC and LGBTQ communities in the city.

In conducting the initial research, the team noted that Opera Parallèle stands out from other organizations with the way it seeks to engage donors. In some regards, Opera Parallèle operates within the paradigm of traditional fundraising models. Donations for Opera Parallèle follow the donor pyramid, like many other organizations. There are standard benefits like having names listed on the website if donors contribute any amount

[124] "Mission, Vision, Values, and Goals." Opera Parallèle, accessed May 2, 2022, https://operaparallele.org/mission/.

over $1,000. However, the element that sets Opera Parallèle apart is its transparency about how a donation impacts the art-making process of the organization.

Opera Parallèle offers an artist sponsorship program, which allows the company to "hire, develop, and elevate the people who make our thrilling work possible."[125] The sponsorship also operates in a tiered system, listing the benefits for each level. The bottom tier is Collaborator ($1,000 - $2,499) which grants patrons an invitation to a meet-and-greet at one dress rehearsal. For the Changemaker tier ($2,500 - $4,999) the patrons receive all the benefits of lower-priced levels as well as an observation of the artists in rehearsal. The Transformer tier ($5,000 - $9,999) includes all the previously mentioned benefits plus an invitation to a full company meeting with the artists. The final tier, Gamechanger ($10,000+) includes lunch with a sponsored artist.[126]

These tiered benefits are tied to a particular artist. On its website, Opera Parallèle includes a listing of the 2021-2022 artists that are open to sponsorship, including a short biography and a photo. The purpose of these sponsorships is to subsidize the costs of housing, travel, and performance fees for these artists. In addition to the current sponsorship candidates, Opera Parallèle includes testimonials—both in written and video form—about why the sponsorship model is so beneficial.

Donors like to see what their money is supporting and how it fosters the art a company creates. Having this level of transparency, plus a direct connection to artists, offers an insight into the creative process. Donors are encouraged to see how their contribution has a genuine impact on an organization they support.

6.3.4.3 Case Study #3 - This is Not a Theatre Company

This is Not a Theatre Company (TINATC), located in New York City, New York is a site-specific dance-theatre company that was founded in 2013. While the company does not have a publicly available, formal mission statement, it describes itself as follows:

> "This Is Not A Theatre Company creates site-based, interactive, multi-sensory, participatory dance-theatre that is smelled, touched, and tasted as well as seen and heard. We use play (as both noun and verb) to foster critical thinking, multi-sensory full-bodied engagement, and radical empathy. Our work is not passively consumed; audiences co-create with us and, in doing so, actively practice creativity."[127]

[125] "Artist Sponsorship 2021 | 2022." Opera Parallèle - San Francisco Contemporary Opera, accessed May 2, 2022, https://operaparallele.org/artistsponsor/.
[126] "Artist Sponsorship," Opera Parallèle.
[127] "Home." This is Not a Theatre Company. Accessed March 28, 2022. https://www.thisisnotatheatrecompany.com/.

The company's work is guided by a manifesto published on its website titled "Rasa-Festa,"[128] written by director Erin B. Mee and playwright Jessie Bear.[129] The manifesto speaks to the company's desire to become more than just any old theatre. It describes the type of theatre that it engages in as "dirty, gritty, thoughtful and surprising, set anywhere but a theatre."[130] It further defines its approach to theatre as being non-linear, trusting of the audience, participatory, ritualistic, and accepting.[131]

TINATC's business model is built on outstanding audience engagement via non-traditional presentations hosted via a digital format or performed in an unusual location. The company's first show, *A Serious Banquet (2014),* gave "partygoers'' an interactive experience with performers in a Picasso-inspired, Cubist-themed environment. The goal was to create a space where guests felt that they were immersed in a Picasso painting and to translate some of Picasso's work into "movement, sound, smell, and taste."[132] Another production, *Pool Play,* presented in 2014 and again in 2017 took place in a pool where audience members sat along the edges, able to dip their toes in and become a part of the exploration of "America's long, joyful, and complicated relationship with water, swimming, and pools."[133] Both of these productions add audience participation to the production, allowing for a deeper, more meaningful connection to the work. As mentioned earlier in this report, building genuine connections with audiences, who then become donors, is an effective method to encourage sustained engagement. The site-specificity helped enhance the story, while the active participation from audience members encouraged a more memorable experience.

The company has also produced several "podplays" even before the onset of the COVID-19 pandemic. However, over the past two years, the company has produced digital offerings that still employ aspects of site-specificity. Each work is archived on its website and available for audiences at any time. For example, its production *Life on Earth (2020),* is freely available to access on Discord, a content distribution platform that allows real-time communication through messaging, video calls, and other media.[134] While the archival version doesn't allow for real-time engagement, the availability of an archived production breaks any location, time, or access barriers for people who were unable to attend in person. Another podplay entitled *Play in Your Bathtub: A Site-Specific Audio for Physical*

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[128] "Manifesto," This is Not a Theatre Company, accessed April 21, 2022, https://www.thisisnotatheatrecompany.com/manifesto.
[129] "This Is Not A Theatre Company," in *Wikipedia*, April 10, 2022, https://en.wikipedia.org/w/index.php?title=This_Is_Not_A_Theatre_Company&oldid=1082016804.
[130] "Manifesto," This is Not a Theatre Company.
[131] "Manifesto," This is Not a Theatre Company.
[132] "A Serious Banquet," This is Not a Theatre Company, accessed April 21, 2022, https://www.thisisnotatheatrecompany.com/a-serious-banquet.
[133] "Pool Play," This is Not a Theatre Company, accessed April 21, 2022, https://www.thisisnotatheatrecompany.com/pool-play.
[134] "Life on Earth," This is Not a Theatre Company, accessed April 21, 2022, https://www.thisisnotatheatrecompany.com/life-on-earth.

Distancing (2020) allows audience members to experience the work from the comfort of their own bathtub. The production has been “experienced in over 30 countries” and translated into Russian and Argentinian Spanish.[135] Even though the podplay is not visual in nature, the listener is still creating the site-specific experience for themselves. The organization’s engagement is based on creating an “experience” for the audience members that is unlike any other theatre experience they’ve had before and its unique approach to providing in-person and digital site-specific content is innovative in its simplicity; the experience TINATC creates in-person draws curious audiences, but the impact continues when audiences go home and experience performances from the organization on their own time.

The financial structure is very different for TINATC, as it is supported by Fractured Atlas, a company that supports artists and creatives by “providing fundraising tools, educational resources, and personalized support.”[136] At the moment, it also does not seem to hold formal 501(c)3 nonprofit status as it does not currently have any publicly available financial documentation standard for nonprofits. However, the lessons TINATC provides for increased engagement are still relevant for OSO. Most importantly, TINATC does an excellent job of articulating *why* it is doing the work that it does. It is not simply about creating a unique experience, it’s about fundamentally changing how people experience theatre, and then following through on that belief. Understanding the importance of the work being done and how that is communicated to the organization’s stakeholders is crucial to maintaining growth for the organization.

6.3.5 Conclusion

With the knowledge gained from benchmarking, the team was able to build recommendations for OSO that can be understood as reasonably effective given the unique artistic position of the organization. The three case studies serve as examples of itinerant organizations OSO can learn from that are able to engage their stakeholders and donors through a variety of means. Quantum Theatre creates mutually-beneficial partnerships that help to build social connections with the communities where its productions take place. Opera Parallèle utilizes a unique donor sponsorship system that connects each individual to the art and artists, providing a tangible impact for donor contributions. And finally, TINATC clearly expresses its value as an organization and how it seeks to make the world a better place through non-traditional theatre.

6.4 External Analysis Summary

Conducting an external analysis of OSO was an important step in understanding the current perception of the organization from stakeholders and how the distinctive artistic

[135] “Life on Earth,” This is Not a Theatre Company.
[136] “Supporting Artists.” Fractured Atlas, accessed May 1, 2022, https://www.fracturedatlas.org/what-we-do.

position of the organization might be leveraged to form meaningful relationships. By engaging in donor interviews, and donor empathy mapping, the team was able to understand the unique needs of potential stakeholders. All too often, organizations use strategies for communicating with donors that are not backed up by data, utilizing one-size-fits-all assumptions. Centering the donor's experience and clearly articulating the unique motivations and aspirations of the organization can help communicate an organization's value.

Through benchmarking organizations similar to OSO, the team found a variety of strategies that help these itinerant performing arts organizations build partnerships with the community, deepen engagement with donors, and elevate the communication of their value propositions. Quantum Theatre, Opera Parallèle, and This Is Not A Theatre Company are good cases for OSO to consider as it looks to more consistently engage donors in its work.

With the external analysis complete, the team was able to use the information gathered to support recommendations for OSO moving forward.

Chapter 7: Recommendations

As referenced throughout this report, all of the team's research—internal and external methodologies and additional interviews with advisory board members and On Site Opera (OSO) leadership—led to a synthesis of the gathered information into a final, actionable set of recommendations. In thinking through these findings, the team formulated a practical framework of strategies that OSO can implement to help address the research question.

As a reminder, the question driving the team's research was: *How might we identify meaningful and sustainable engagement strategies that leverage OSO's distinctive artistic position for small and mid-level donors?* The answers provided in this section are by no means exhaustive in addressing as complicated a topic as donor engagement. However, based on the team's research, the implementation of these recommendations will make a measurable impact on OSO's ability to reach the small and mid-level donors that it seeks to engage.

After much brainstorming and discussion, the team created a framework for recommendations called "The Three C's." These C's stand for Consistency, Capacity, and Communication. Each "C" is defined and the recommendations housed within each category are presented in the following sections. Each "C" contains broad overarching recommendations which in turn contain several strategies the organization can utilize to attain the recommended result.

This model does take into account the question of prioritization and the Three C's were created with flow in mind. Creating consistency will allow OSO to build capacity which will then allow the organization to create more targeted communications. The recommendations are organized specifically to build on one another so they can be taken as a step-by-step process.

This framework came from discussions regarding OSO's use of the fundraising cycle. As detailed in chapter 3.3, the fundraising cycle is a model used by fundraising professionals to map how an individual donor is acquired and retained over time which provides structure to development planning within the organization. One interpretation of the cycle by Tina Cincotti, details how much time should be allocated to each of the five phases of the cycle.

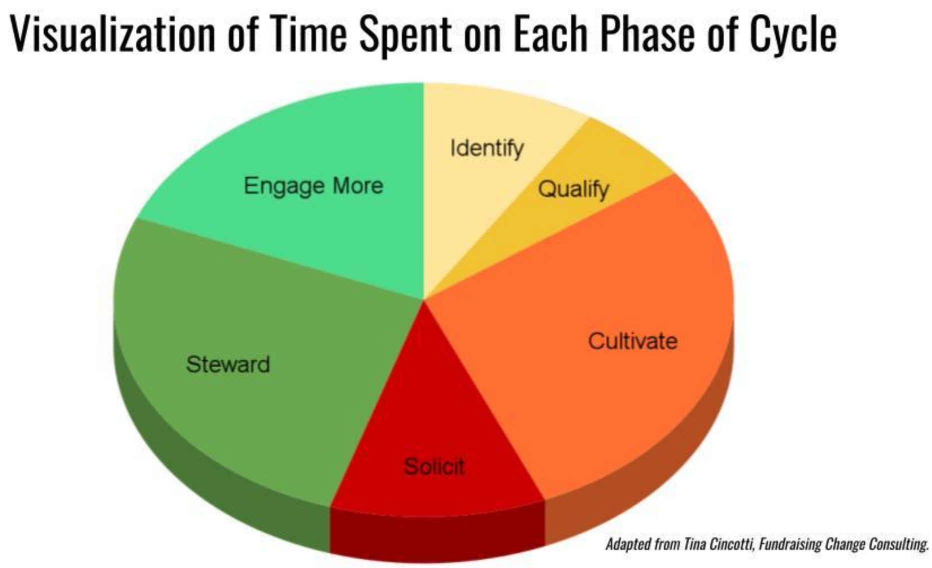

Figure 7.1: Visualization of Time Spent on Each Phase of Cycle adapted from Tina Cincotti, Fundraising Change Consulting.

Most of a fundraiser's time should be spent in the cultivation and stewardship stages, which in figure 7.1 also includes the category "Engage More." In comparing OSO's current operations with this model, it became clear that the recommendations the team wanted to make were directly related to the allocation of time spent in each of these phases, specifically in the areas of cultivation and stewardship.

Therefore, the team started by framing the recommendations around the fundraising cycle but quickly realized that it was limiting. Many strategies did not fit neatly into one of the five steps of the process and did not allow acknowledgment of more internally focused recommendations. Therefore, the Three C's were created to provide a more holistic approach that will help address each area of the fundraising cycle while acknowledging that implementing the recommended strategies will help in multiple areas of the cycle.

With this understanding of the recommendation framework, the following sections will present and justify the recommendations the team has identified for OSO.

7.1 Consistency

The first “C”, Consistency, is defined by the team as creating strong organizational tools for development work and a framework for an effective donor database. This recommendation came directly from the initial literature review of fundraising best practices as well as the internal data analysis. Consistency is important for increasing organizational efficiency within OSO’s operations by streamlining workflows, preserving institutional knowledge, and keeping donors from falling through the cracks. In addition, consistency is useful in maintaining a consistent “voice” for the organization across interactions, and the processes that contribute to consistency establish a solid base for future growth. In the simplest terms, consistency increases efficiency within the organization. It is hard to grow and reach more donors and patrons when internal operations are opaque.

7.1.1 Policies and Procedures

The first area for the team’s recommendations under Consistency revolves around policies and procedures. The following two strategies were created to address this:

1. Write out and formalize fundraising procedures according to AFP best practices.
2. Create resource documents for development staff and advocates.

As detailed in chapter 3.6, it is a fundraising best practice to have formal, written policies and procedures for any nonprofit organization. Currently, OSO lacks written policies and procedures, which makes it challenging to describe its gift acceptance and acknowledgment practices to anyone outside of the current development team. By crafting a written set of documents, OSO sets itself up for success. Policies and procedures, when written down and formalized, can be handed to new employees as a guide, reducing the amount of time it takes to onboard new staff.[137] Additionally, these policies help build donor trust. Donors want to know that their gifts are being handled appropriately. Therefore, having transparent, clearly stated procedures helps the organization communicate these processes effectively.[138]

Resource documents are another way for staff to effectively implement these policies and procedures, especially with regard to the CRM and outside advocates. On Site Opera stated that their current CRM requires a lot of training to understand and fully utilize. By creating a resource document detailing the necessary steps to be taken with regard to using the CRM, it will be easier to train staff members to use it and to make sure CRM data entry follows a standard format. Without written resources that accompany the CRM, it is possible that a change in staff could result in the loss of critical CRM knowledge that would negatively impact the ability of the development team to utilize valuable data.

[137] Ciconte and Fortnum, *Developing Fundraising Policies.*

[138] Ciconte and Fortnum, *Developing Fundraising Policies.*

In addition to resources for the CRM, resource documents for advocates can also be helpful. On Site Opera board members already have a basic script that is used when making acknowledgment phone calls, but there is a lack of other guidance. Based on interviews with the team's advisory board members, it's important that the board is given specific tasks and objectives. In order to accomplish these tasks effectively, they need to be trained to convey the messages the organization wishes to share. Effective advocates are those who can clearly talk about the organization in a meaningful way with other stakeholders. By creating resource documents for advocates of the organization, this training process will be much easier and OSO can refer to these documents anytime a new advocate wants to become involved.

Together, these two strategies will allow OSO to operate with more internal efficiency, allowing for more time to be spent on building vital donor relationships.

7.1.2 Data Tracking

The second area of the team's recommendations for Consistency involve increased utilization of data tracking. The team has developed the following two strategies to help OSO succeed in this area:

1. Improve CRM data management and utilize available tools.
2. Engage in simple donor segmentation practices.

On Site Opera uses Patron Manager as its CRM software, which provides a wide variety of tools for both data analysis and data tracking purposes. While OSO has stated that they find this proliferation of tools overwhelming, the team recommends that OSO utilize specific tools in targeted ways to increase their data tracking capabilities This will lead to increased analytical opportunities and more efficient prospecting.

For example, Patron Manager allows users to "track all of a donor's engagement" with an organization by uniting "ticket sales, subscriptions, and contributions in the same database."[139] The team recommends that OSO extensively track all engagement with every donor in order to best capture their relationship with each individual. This includes making note of when a patron has been sent an email, invited to a show, included in a mass mailing, invited to an event, attended a show, served on the board, etc., along with the relevant results of these "moves" (i.e. if they bought a ticket, responded to a mailed solicitation, etc.). As OSO builds engagement tracking habits, it will be possible to create detailed cultivation plans for each patron or prospect, which will streamline the solicitation and cultivation process.

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[139] "Fundraising and Donor Development." Patron Manager, accessed May 1, 2022, https://patronmanager.com/patronmanager/fundraising/.

Additionally, extensive donor data tracking will allow OSO to make full use of Patron Manager's large suite of analytics tools, which will be made simpler by implementing the recommendation in section 7.1.1 of having policies and procedures for how data is collected and properly stored. Patron Manager offers specific tools designed to help organizations move through each section of the fundraising cycle. For example, Patron Manager assists in prospect identification and qualification by allowing organizations to "run cross-departmental reports to identify frequent ticket buyers who've never donated."[140] When deciding which prospects to cultivate and solicit, Patron Manager aggregates all relevant data to ensure that organizations "know who's spent the most with [the] organization, including ticket purchases, and [can] focus on building that relationship."[141] There are event-related tools to address the stewardship phase. Patron Manager allows an organization to set up push notifications to alert when a patron donates over a certain threshold so that the organization can immediately acknowledge the gift in a way that aligns with its policies and procedures.[142]

In short, properly and extensively utilizing the resources of their Patron Manager CRM system will enhance OSO's ability to move prospects through the fundraising cycle, thus increasing their base of properly cultivated small and mid-level donors.

The team's second recommendation around data tracking is that OSO should begin utilizing a process of simple donor segmentation. Nonprofit consultants The Bridgespan Group defines donor segmentation as "the process of grouping…donors into discrete categories that share similar needs or characteristics that are relevant to strategic decisions and actions. By classifying…donors into segments with specific demographics, demands or needs, nonprofit organizations can gain a greater understanding of each group and strive to serve them better."[143] Defined even more simply by Dataro, "Donor segmentation is the process of sorting your donors into groups based on shared demographic characteristics and previous engagement metrics…"[144]

The team recommends that OSO begin segmenting donors in order to provide more effective communications (as discussed further in section 7.3); tailor solicitations and cultivations more effectively and efficiently; and better determine ROI and effectiveness of fundraising tactics for specific constituencies. While the team recognizes that OSO is moving towards a model of Community-Centric Fundraising, they note that donor segmentation does not necessarily have to mean segmenting by donation size. Donors can be segmented into any categorization that is most useful to an organization, be it amount

[140] "Fundraising and Donor Development," Patron Manager.
[141] "Fundraising and Donor Development," Patron Manager.
[142] "Fundraising and Donor Development," Patron Manager.
[143] "Beneficiary and Donor Segmentation." Bridgespan.org, The Bridgespan Group, accessed May 1, 2022, https://www.bridgespan.org/insights/library/nonprofit-management-tools-and-trends/beneficiary-and-donor-segmentation.
[144] Tim Paris, "Donor Segmentation: Understanding the RFM Approach." Dataro, August 6, 2021, https://dataro.io/2021/08/06/donor-segmentation/.

of time invested, number of donations, number of shows attended, etc. Additionally, CRM systems such as Patron Manager can be utilized to create segments based on data, or can suggest segmentation options itself. In short, segmentation as a practice is critical to ensuring clean, effective, and consistent data collection practices, which are key to maintaining organizational consistency.

7.2 Capacity

The second "C", Capacity, is defined by the team as creating the time and space to cultivate and steward donor relationships and invite stakeholders to help in achieving that goal. Capacity is important because, as a fundraiser, how you spend your time matters. Developing strong donor relationships is an ongoing process that takes time and attention to do it effectively. Given that staff time is a finite resource, an organization must build capacity by prioritizing what activities are most important and understanding where support is needed to meet the organization's goals. Capacity can also be created by leveraging internal and external relationships to assist in donor engagement and expand the organization's outreach efforts.

7.2.1 Balance Staff Needs

Capacity planning requires an understanding of available resources and strategizing how best to meet demand while balancing the needs of staff. The following three Capacity strategies were created to address these needs:

1. Contract CRM support and grant writers.
2. Work towards hiring a full or part-time Development Associate.
3. Plan with staff in mind and track burnout regularly.

To build staff capacity in the short term, OSO should bring in contract support to assist with specific development tasks. First is the hiring of a CRM consultant. As discussed in the recommendations around consistency, building effective and efficient systems are critical to the successful implementation of development practices. A Customer Relations Management (CRM) system is a central tool in the management and retention of stakeholder data and, when optimized, can save an organization time and money. Contracting with an expert consultant to build out the CRM platform and develop staff training manuals will ensure that OSO is maximizing its capabilities to meet the organization's communication and tracking needs. Second is the hiring of a skilled grant writer. OSO has seen steady growth in the amount of grant funding received year-over-year, but with that comes an increased demand on staff time to research, write, and submit these grants. By out-sourcing writing to a contractor, OSO's Development Manager can continue to oversee the grant writing process while bringing more efficiency to fundraising activities.

In the long term, OSO should work towards hiring a full or part-time Development Associate staff member. As OSO's operating budget continues to grow, it will also become necessary to grow staff capacity. While volunteer, intern, or contract labor can help to supplement fundraising tasks, a dedicated staff member will bring value to the organization through their consistency and reliability, as well as their ability to build institutional knowledge and develop relationships. A Development Associate staff position would be able to oversee day-to-day fundraising demands, such as gift entry, grant writing, and donor acknowledgment, freeing up the Development Manager and Executive Director to attend to the critical relationship-building required to cultivate and steward donors.

Additionally, with a discussion around staff capacity, it is important to draw attention to the increased pressure placed on development staff to formulate effective strategies and meet the organization's fundraising goals. As is typical with many arts organizations, OSO's programming needs often inform fundraising objectives, with development staff working backward to construct a development plan that fills funding gaps instead of first strategizing what is feasible given the available resources and prioritizing work based on that strategy. In creating an annual development plan and calendar, OSO should take a holistic view that incorporates staff capacity into its strategy. It should construct a timeline that takes into account when demand for staff time is high and how best to alleviate undue pressures in order to create a more sustainable workload.

One way to do this is to monitor staff burnout through monthly or quarterly surveys, which can then be reviewed on an annual basis and tracked over time to identify patterns. Staff burnout should be factored into the ROI of any fundraising initiative. If the development calendar is structured in a way that fundraising activities regularly strain staff capacity, then the organization may be overburdening its staff and risking the potential for employee turnover, which could be more costly to the organization in the long run. By both centering staff capacity into the creation of an annual development plan as well as routinely monitoring for stress points, OSO will be able to not only strategize its activities more effectively but will also be able to determine when additional contact or hired staff should be brought in to lend support.

7.2.2 Engage Stakeholders

In addition to bolstering staff, OSO should engage its internal and external stakeholders to help in building capacity for the organization. The following two strategies were created to address this:

1. Leverage board member strengths to serve as advocates.
2. Create mutually beneficial partnerships to connect to new donors and strengthen organizational values.

As the primary governing body, OSO's board of directors oversees the management of the organization and serves as an advocate for its mission and activities. One of the pillars of OSO's success has been its passionate and active board, which has supported development activities by contributing to the acknowledgment and engagement process of OSO's donor base. As shared in chapter 5.3 of this report, the team's literature review on donor relationships found that major drivers for donor cultivation and stewardship are leveraging personal relationships of key stakeholders such as staff and board, and reinforcing donor value through personalized touchpoints that express gratitude and communicate impact. However, given the limited capacity of OSO's staff to sustain these personalized communications, such as handwritten thank you notes or phone calls, the team recommends that the board should be drawn on further to support donor outreach and engagement.

After following through on the consistency recommendations shared in section 7.1.1, OSO can utilize those resource documents to codify the board's fundraising efforts. To provide additional oversight and strategic support to these activities, the board should form a Fundraising Committee to help lead these initiatives and direct board engagement. Leveraging board members' strengths as part of a dedicated committee will support OSO's capacity to personally engage with its donors and ensure accountability among its board members. Working in tandem with staff, the Fundraising Committee would be responsible for the development of an annual plan for board-led fundraising initiatives; the identification and qualification of fundraising prospects known to board members; and overseeing and reporting on the critical engagement activities that serve to build strong donor relationships.

With the help of the board to leverage internal stakeholder networks, OSO should seek to engage external stakeholders by developing mutually beneficial partnerships. In the team's interviews with OSO stakeholders, many spoke of their desire to see OSO partner with organizations "that need help and attention." Recognizing this is not always an easy thing to achieve, those interviewed cited productions such as *Amahl and the Night Visitors* as making them feel as though their purchase of a ticket increased their impact by allowing them to support multiple organizations at once. Another interviewee mentioned their interest in contributing to fundraising campaigns that would support OSO's educational outreach to bring productions like *The Tale of the Silly Baby Mouse* to schools in the city, or to offer programs like *The Road We Came* as a resource for arts educators. Building upon OSO core values such as accessibility, partnerships offer an opportunity to create engagement pathways for new stakeholders, increasing OSO's capacity to reach a wider audience.

Further opportunities, such as those shared in the team's benchmarking case study of Quantum Theatre in chapter 6.3.4.1 could leverage the organization's reach by forming partnerships with local small businesses in the communities where its productions are held. The site-specific theatre company Quantum Theatre demonstrates how a company that lacks a permanent venue can connect with its community. By establishing pre-show events such as Social Q and Quantum Quaff at local restaurants and bars, patrons are able to engage with the company and discover new places in the neighborhood in which the current production is being held. Additionally, Quantum Theatre has created partnerships with several restaurants and local charities that address food insecurity through the NearBuy program. The program had the three-fold benefit of connecting Quantum with the community it holds temporary residence in, increasing familiarity with local businesses to patrons of Quantum, and supporting people in need. In creating programs that go beyond the performance venue, Quantum Theatre is able to connect with its audience in a way that encourages the growth of its community.

Whether these mutually beneficial partnerships are formed in creative alignment with OSO's artistic programs or created as social connectors for its community, these engagements have the ability to build capacity for the organization in expanding its reach to new audience members and donors and demonstrating its organizational values.

7.3 Communication

While fundraising is built around maintaining strong relationships, reaching small to mid-level donors is also a marketing science. By necessity, the vast majority of engagement with this segment of givers happens over email, mailing campaigns, and social media. Because of this reality, capturing their attention requires strategic thinking and fundraising savvy. Too many fundraising emails are lost on the reader and fail to prompt action. To round off the recommendations, this final "C" focuses on capturing the attention of donors through compelling communications. The following sections provide guidance on how to better engage donors through specific and reciprocal outreach strategies that clearly convey organizational values and impact.

7.3.1 Determine the "Why"

Compelling fundraising communications clearly articulate organizational values and rally donors around a common cause. The following strategies were designed to help OSO better communicate its purpose as an organization:

1. Define the "Why" for the organization.
2. Write a case statement that expresses organizational values and the "Why."

What is the differentiating factor between the organizations and leaders who inspire loyalty and commitment, and those who fall short of their full potential? Simon Sinek, a British-American author and inspirational speaker, answers this question by posing a model he calls the Golden Circle. Using this very simple idea, a model with three concentric circles with "Why" as the center, "How" as the middle, and "What" as the outer circle, Sinek attributes true influence to those who think, operate, and communicate from the inside out.[145]

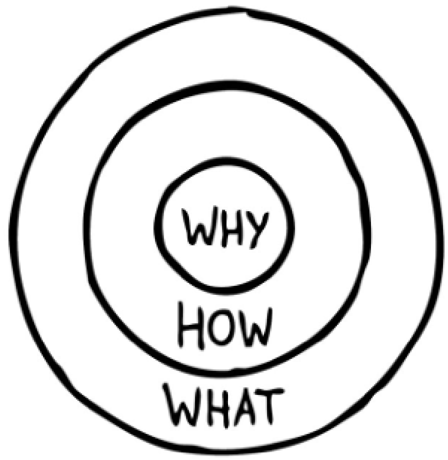

Figure 7.2: The Golden Circle adapted from Simon Sinek, "Start With Why," TED Talk, 2010.

Sinek's central thesis is that "people do not buy what you do, they buy why you do it."[146] Every organization knows *what* they do. These are the products it sells or the services it provides. Some organizations know *how* they do what they do. These are the differentiating value propositions; the qualities which make them special and set them apart from their competition. However, Sinek argues that very few organizations know *why* they do what they do. The "Why" is a purpose, a cause, or a belief. The "Why" articulates the reason an organization exists and why anybody should care. While many organizations can clearly express their "What" and "How," only inspired organizations think and communicate from the inside of the circle out.

In the team's interviews with OSO stakeholders, it was clear that OSO supporters understood the "What" and "How" of OSO's mission. On Site Opera's site-specific work has an attractive differentiating value proposition, one which OSO has successfully communicated to its stakeholders. Interviewees were drawn to OSO's innovative programming and recognized site-specific work as a powerful mode through which to increase the relevance and accessibility of operatic works. However, there seemed to be a disconnect between the "How" and "Why" of what OSO does. None of the stakeholders the team interviewed could quite articulate the greater meaning behind OSO's offerings. While they loved OSO's shows and were excited to attend the next one, many did not see a donation to the organization as a contribution towards a meaningful enough cause. While innovative programming attracts ticket buyers, only compelling "Whys'' inspire commitment and support.

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[145] TED. "How Great Leaders Inspire Action | Simon Sinek." *Youtube* video, 18:34. May 4, 2010. https://www.youtube.com/watch?v=qp0HIF3SfI4

[146] TED, "Simon Sinek."

Before OSO can inspire a larger network of supporters, OSO leadership first needs to conduct the internal work of clarifying the reason the organization exists. While OSO's website is home to a compelling set of values and an action-oriented mission statement, the meaning of the organization's work is not clearly articulated. To build the foundation for more compelling communications, this team recommends that OSO invests the time to narrow in on its "Why" statement, a statement that answers how OSO's offerings make the world a better place. The "Why" statement should be simple, compelling, and easy to understand, as This is Not a Theatre Company exemplified in the benchmarking case shared in chapter 6.3.4.3. It should not be cloaked in industry jargon or elaborate metaphors but should be immediately clear and comprehensible. Clear and captivating statements of purpose are invaluable and should serve as the driving force behind all donor-facing communications.

To further expand upon this statement of purpose and ensure it is communicated consistently across fundraising materials, the "Why" should serve as the foundation for building a compelling case statement. AFP defines a case statement as a "presentation that sets forth the reasons why an organization both needs and merits philanthropic support, usually by outlining the organization's programs, current needs, and plans."[147] Case statements serve as a concise, clear summary of an organization's work and why anyone should contribute to the organization's mission. This core document should include the organization's mission, vision, and values statements, and should clearly answer the who, what, and why of the organization's fundraising efforts.[148] By collecting this information into a central document, the case statement can serve as the starting point for all future fundraising campaigns, grant applications, and donor-facing materials. The process of compiling case statements helps organizations clarify their fundraising narrative and makes communicating this narrative to supporters easier.

7.3.2 Express the "Why"

Once the "Why" is established, the next step is to frame it in such a way that inspires action from supporters. Expressing this "Why" to donors requires connecting the organization's cause with the donor's values. Messaging should use simple, easy-to-read, and often, repetitive language to efficiently reinforce organizational values and why they should matter to the donor. Jeff Brooks, author of the *Fundraiser's Guide to Irresistible Communication*, maintains that all truly compelling fundraising communications follow a set of tried-and-true conventions.[149] At its core, compelling fundraising communications follow these two guiding principles which the team recommends as useful strategies:

1. Make it all about the donor.

[147] "AFP Fundraising Dictionary," Association of Fundraising Professionals.

[148] "What is a Case Statement." Candid Learning, accessed May 3, 2022, https://learning.candid.org/resources/knowledge-base/case-statements/.

[149] Jeff Brooks. *The Fundraiser's Guide to Irresistible Communications* (Medfield, MA: Emerson & Church, 2012).

2. Provide clear, specific calls to action.

When constructing appeals, messaging should be less about the company and its achievements and more about making the donor feel important. The point of fundraising is not to raise money to fund an organization. Rather, fundraising is an act of enabling donors to make the world a better place through the organization. Every story of impact should set the donor up as the protagonist because the organization's work only happens when donors choose to give. Donors should be able to see themselves in every piece of communication because this reinforces the meaning and importance of their support. Jeff Brooks suggests the *BOY* rule as a surefire way of making a statement of impact all about the donor; simply add "because of you."[150]

While challenging, an even more effective way of making fundraising all about the donor is to appeal to their unique values and experiences. By clearly drawing connections between the organization's impact and the donor's personal set of beliefs and aspirations, donors will begin to identify more closely with the organization's cause. On Site Opera should take the time to think through the reasons why donors support the organization and from what offerings they derive the most value. As outlined in chapter 6.2, donor empathy maps are a helpful tool for clarifying the unique values that motivate donor behavior. Donor empathy maps can unlock the reasons why donors choose to give, leading to messaging that directly reflects and satisfies these motivations.

Once the connection between the organization's cause and the donor's values is articulated, the next key in engendering commitment is to put some action in the donor's hands. While communicating the impact the donor has in forwarding the organization's mission creates meaning, only clear and specific calls to action invite a response. Both the literature review and stakeholder interviews revealed that donors are most responsive to communications that make clear exactly how they can offer their support. When making an ask for support, calls to action should be straightforward. Fundraisers tend to avoid clear calls to action out of a fear of coming off too aggressive. The tendency is to disguise asks instead of being clear in the ask for money. However, if messages fail to ask, or pretend not to ask, all that is accomplished is unclear communication. Therefore, the final step in turning believers into supporters is to make the next step clear by making a specific ask.

7.3.3 Personalize the "Why"

Once OSO establishes its "Why" and a way of talking about the "Why" that invites commitment and compels action, the next step in elevating its communications is through strategic segmentation. The following two strategies were created to address this:

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[150] Brooks, *The Fundraiser's Guide*.

1. Tailor communication based on donor segments.
2. Deepen commitment by inviting loyal donors into increasing levels of support.

As outlined in chapter 3.5, one of the main reasons donors stop giving to an organization is because they felt as if the communications they received were not appropriate for them. According to Dr. Adrian Sargeant, “Perceptions of the quality of service offered to donors are the single biggest driver of loyalty in the fundraising context.”[151] Segmentation allows organizations to craft communications that feel more relevant to their intended audience. By making marketing materials more personalized, even the simplest forms of segmentation can improve both the acquisition and retention of donors.

For fundraisers trying out segmentation for the first time, the most impactful action they can take is to start by separating our first-time donors from all other donor-facing communications.[152] Research from AFP shows that most first-time donors tend not to give again, and the team’s internal analysis revealed that this was also true of OSO’s first-time donors.[153] As described in chapter 5.3, getting first-time donors to give second and third gifts is essential in increasing retention rates. For this reason, first-time donors require a differentiated level of care that may not apply to all repeat givers.

It is important to have a plan in place to make first-time donors feel welcomed and valued. Protocols should be established for how first-time gifts should be acknowledged. For example, a protocol could dictate that new donors receive either a personal call or mailed acknowledgment within a week of OSO receiving their first gift, perhaps including an invitation to another event in the acknowledgment. Responding promptly after the gift is given is crucial in maintaining and reinforcing the excitement of the individual’s decision to support the cause. This is also a great time to send a survey to get to know more about them and why they decided to give. Finally, many industry leaders recommend guiding first-time givers through a donor welcome cycle for the first twelve to eighteen months after the first gift.[154] As a way of welcoming and introducing new givers to the cause, new donors are sent a personalized sequence of communications that have been proven to elicit emotional responses to cement their commitment to the organization.

For all other donors, the level of segmentation becomes a matter of capacity. When communicating for retention, any level of added personalization leads to more effective engagement. OSO already does this successfully with major givers and highly engaged donors. But personalizing communications for those donors with whom the staff is not yet acquainted requires a reliance on the organization’s database. Sound data tracking processes like the ones outlined in section 7.1.2, should inform the personalization of

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[151] Sargent, “Donor Retention.”

[152] “An Introduction to Donor Data Segmentation,” Association of Fundraising Professionals.

[153] “An Introduction to Donor Data Segmentation,” Association of Fundraising Professionals.

[154] Sargeant and Jay, *Building Donor Loyalty*, 17.

mailings by segments. For organizations introducing subscription giving, one way to group donors is into monthly and annual givers. Those who contribute monthly should receive a differentiated set of acknowledgments than those who contribute annually. Another relatively easy way to elevate the personalization of fundraising communications is to segment based on the last show a donor attended. By adding this simple piece of information, communications take on a more familiar tone and better center the donor's experience.

Appeals to already loyal donors should deepen commitment by inviting them to higher levels of support. Stakeholder interviews revealed that OSO donors would be willing to be more involved with the organization, either through increased giving or volunteering, if the organization asked them to increase their support. On Site Opera should further personalize its annual appeals by articulating a specific dollar amount increase based on how much the donor contributed during the previous year. This action accomplishes three purposes: it shows that the organization pays attention to and values the gifts the donor has already contributed; it gives the donor a practical and actionable amount to respond to; and it invites a higher level of commitment from the donor through increased financial support.

As with all customer-centric offerings, donor-facing communication should be improved through feedback from the organization's intended audience. Taking the time to survey donors' needs and preferences leads to "two-way relationships'' between an organization and its supporters. By intentionally seeking the perspectives of its donors, organizations can send a message that they are interested in their donors' views and are invested in having an ongoing relationship with them. Regular surveys and interviews can provide feedback on the effectiveness of communications. Tracking this over time will ensure that communications continue to meet donor needs and preferences as their motivations evolve and this feedback should be used to regularly update and improve segmentation.

7.4 Conclusion

On Site Opera is an organization with clear guiding principles and a unique artistic product that draws new audiences to opera in NYC and the surrounding regions. It has donors who understand the organization's value and want to see OSO continue to thrive.

After this 10th anniversary year, OSO is poised to continue on a growth trajectory in terms of financial sustainability and artistic product. Based on the team's internal and external analyses, OSO can learn from best practices, other organizations, and donors themselves how to meet fundraising goals by changing how they approach donor relationships. Prioritizing the needs and values of donors by building truly meaningful relationships with them as individuals will lead to higher levels of giving and increased loyalty and commitment to the organization.

The recommendations posed in this report will take an investment of time and resources, but the payoff will be healthier donor relationships, higher giving, and more motivated staff, which will ultimately lead to the continued growth OSO wishes to achieve. By focusing fundraising efforts on Consistency, Capacity, and Communication, OSO will more effectively engage small and mid-level donors and build a sustainable financial base for its future artistic endeavors.

Appendices

Appendix A: SWOT Analysis

The Strengths, Weaknesses, Opportunities, and Threats analysis, or SWOT for short, is a tool used to take stock of an organization's overall strategic position. Strengths and weaknesses focus on internal capacity, while opportunities and threats represent the external factors of the organization's environment. The following table was included in the team's midpoint presentation to help visualize OSO's strategic position. This SWOT analysis served as an initial research methodology to help clarify the gaps the team needed to address and led the team to its problem statement and research question.

S Strengths	W Weaknesses	O Opportunities	T Threats
• Unique artistic offering • Innovative forms of engagement • Passionate and active board • Flexibility • Foundation and government support	• No permanent gathering space • Staff limitations • Sporadic engagement • Lack a core of small and mid level donors • Annual giving	• Partnerships with local businesses near performance "venues" • Values of target audience • Opera lovers tired of the "same old" • Young adults and families	• Lack of continuity a barrier to long-term relationships • Priorities of target audience • A breadth of options • Vulnerable to donor shifts

Appendix B: AFP Resources for Creating Policies and Procedures

The following resources from the Association of Fundraising Professionals (AFP) are publicly available documents that organizations should refer to when creating their own fundraising policies and procedures. The Fundraising Policies and Procedures Checklist, the Donor Bill of Rights, and the Code of Ethical Standards can all be used to analyze and inform current and future iterations of an organization's fundraising processes. It is best practice to make sure all development activities are formalized and documented.

Appendix B - 1: Fundraising Policies and Procedures Checklist

SAMPLE DOCUMENT

FUNDRAISING POLICIES AND PROCEDURES CHECKLIST

Is your organization registered where it raises funds?* Yes ____ No ____

Does your organization have:

1. A gift solicitation and acceptance policy? Yes ____ No ____
2. A procedure for processing gifts and maintaining database accuracy? Yes ____ No ____
3. A policy and/or procedure for:
   - ☐ gifts of securities? Yes ____ No ____
   - ☐ gifts of personal property? Yes ____ No ____
   - ☐ gifts of real estate? Yes ____ No ____
   - ☐ gifts of intellectual property? Yes ____ No ____
   - ☐ restricted gifts? Yes ____ No ____
   - ☐ establishing endowments? Yes ____ No ____
   - ☐ planned/deferred gifts? Yes ____ No ____
   - ☐ accepting in-kind gifts? Yes ____ No ____

4. A donor privacy policy? Yes ____ No ____

5. A donor recognition policy? Yes ____ No ____

6. A written procedure for entering and recording gifts?
   Yes ____ No ____

7. A written procedure for acknowledging gifts? Yes ____ No ____

8. Internal Revenue Service/Canada Revenue Agency language on receipts? Yes ____ No ____

9. A state disclosure statement on letters? (U.S. requirement for certain states) Yes ____ No ____

10. A charitable registration number publicly available? (Canada only)
    Yes ____ No ____

11. A permission policy for sending email communications to members/donors? Yes ____ No ____

12. A policy for conducting new special events? Yes ____ No ____

* *This is a complex area requiring an increasingly greater level of attention from nonprofits, paid fundraisers, and fundraising consultants. In the United States, charitable organizations may be required to register in states where they raise funds, but requirements vary from state to state. In Canada, although charities can be incorporated provincially, a fundraising organization must register a charitable registration number or business number (BN) with the federal Canada Revenue Agency (CRA). If you are uncertain about state/provincial and federal registration issues potentially affecting your organization, consult with a qualified professional adviser.*

Appendix B - 2: A Donor Bill of Rights

A DONOR BILL OF RIGHTS

DEVELOPED BY:

Association of Fundraising Professionals (AFP)

Association for Healthcare Philanthropy (AHP)

Council for Advancement and Support of Education (CASE)

Giving Institute: Leading Consultants to Non-Profits

PHILANTHROPY is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To assure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

I

To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.

II

To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.

III

To have access to the organization's most recent financial statements.

IV

To be assured their gifts will be used for the purposes for which they were given.

V

To receive appropriate acknowledgement and recognition.

VI

To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.

VII

To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.

VIII

To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.

IX

To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.

X

To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

Appendix B - 3: AFP Code of Ethics

AFP CODE OF ETHICAL PRINCIPLES AND STANDARDS OF PROFESSIONAL PRACTICE

STATEMENT OF ETHICAL PRINCIPLES

Adopted November 1991

The Association of Fundraising Professionals (AFP), formerly the National Society of Fund Raising Executives (NSFRE), exists to foster the development and growth of fund-raising professionals and the profession, to promote high ethical standards in the fund-raising profession and to preserve and enhance philanthropy and volunteerism.

Members of AFP are motivated by an inner drive to improve the quality of life through the causes they serve. They serve the ideal of philanthropy; are committed to the preservation and enhancement of volunteerism; and hold stewardship of these concepts as the overriding principle of their professional life. They recognize their responsibility to ensure that needed resources are vigorously and ethically sought and that the intent of the donor is honestly fulfilled. To these ends, AFP members embrace certain values that they strive to uphold in performing their responsibilities for generating philanthropic support.

AFP members aspire to:

- Practice their profession with integrity, honesty, truthfulness and adherence to the absolute obligation to safeguard the public trust;
- Act according to the highest standards and visions of their organization, profession and conscience;
- Put philanthropic mission above personal gain;
- Inspire others through their own sense of dedication and high purpose;
- Improve their professional knowledge and skills in order that their performance will better serve others;
- Demonstrate concern for the interests and well being of individuals affected by their actions;
- Value the privacy, freedom of choice and interests of all those affected by their actions;

- Foster cultural diversity and pluralistic values, and treat all people with dignity and respect;
- Affirm, through personal giving, a commitment to philanthropy and its role in society;
- Adhere to the spirit as well as the letter of all applicable laws and regulations;
- Advocate within their organizations, adherence to all applicable laws and regulations;
- Avoid even the appearance of any criminal offense or professional misconduct;
- Bring credit to the fund-raising profession by their public demeanor;
- Encourage colleagues to embrace and practice these ethical principles and standards of professional practice; and
- Be aware of the codes of ethics promulgated by other professional organizations that serve philanthropy.

STANDARDS OF PROFESSIONAL PRACTICE

Adopted and incorporated into the AFP Code of Ethical Principles November 1992

Furthermore, while striving to act according to the above values, AFP members agree to abide by the AFP Standards of Professional Practice, which are adopted and incorporated into the AFP Code of Ethical Principles. Violation of the Standards may subject the member to disciplinary sanctions, including expulsion, as provided in the AFP Ethics Enforcement Procedures.

Professional Obligations

1. Members shall not engage in activities that harm the member's organization, clients, or profession.
2. Members shall not engage in activities that conflict with their fiduciary, ethical, and legal obligations to their organizations and their clients.
3. Members shall effectively disclose all potential and actual conflicts of interest; such disclosure does not preclude or imply ethical impropriety.
4. Members shall not exploit any relationship with a donor, prospect, volunteer or employee to the benefit of the member or the member's organization.

5. Members shall comply with all applicable local, state, provincial, federal, civil and criminal laws.
6. Members recognize their individual boundaries of competence and are forthcoming and truthful about their professional experience and qualifications.

Solicitation and Use of Charitable Funds

7. Members shall take care to ensure that all solicitation materials are accurate and correctly reflect the organization's mission and use of solicited funds.
8. Members shall take care to ensure that donors receive informed, accurate and ethical advice about the value and tax implications of potential gifts.
9. Members shall take care to ensure that contributions are used in accordance with donors' intentions.
10. Members shall take care to ensure proper stewardship of charitable contributions, including timely reports on the use and management of funds.
11. Members shall obtain explicit consent by the donor before altering the conditions of a gift.

Presentation of Information

12. Members shall not disclose privileged or confidential information to unauthorized parties.
13. Members shall adhere to the principle that all donor and prospect information created by, or on behalf of, an organization is the property of that organization and shall not be transferred or utilized except on behalf of that organization.
14. Members shall give donors the opportunity to have their names removed from lists that are sold to, rented to, or exchanged with other organizations.
15. Members shall, when stating fund-raising results, use accurate and consistent accounting methods that conform to the appropriate guidelines adopted by the American Institute of Certified Public Accountants (AICPA)* for the type of organization involved. (* In countries outside of the United States, comparable authority should be utilized.)

Compensation

16. Members shall not accept compensation that is based on a percentage of charitable contributions; nor shall they accept finder's fees.

17. Members may accept performance-based compensation, such as bonuses, provided such bonuses are in accord with prevailing practices within the members' own organizations, and are not based on a percentage of charitable contributions.
18. Members shall not pay finder's fees, or commissions or percentage compensation based on charitable contributions, and shall take care to discourage their organizations from making such payments.

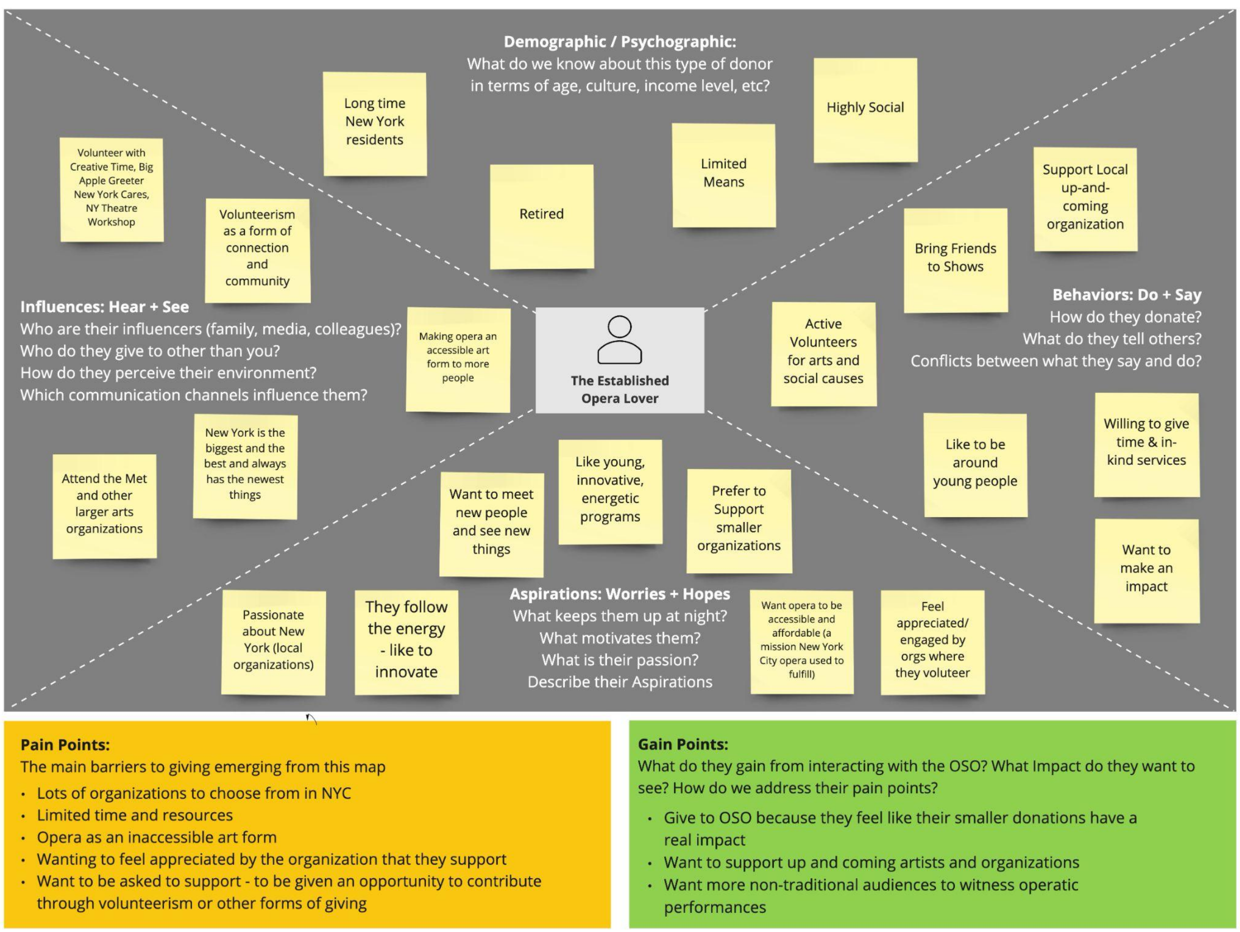
Amended October 1999

Appendix C: Donor Empathy Maps

As detailed in chapter 6.2 of this report, donor empathy mapping is a helpful tool for organizing data and knowledge about donors to drive donor-centric engagement strategies. Canvases like the ones included in this appendix provide the platform for teams to record the ideas generated in brainstorming sessions. The team created these donor empathy canvases in Miro and identified two donor personas the team considered to most accurately represent OSO's unique set of donors. The following two empathy maps reflect the insights generated around each persona.

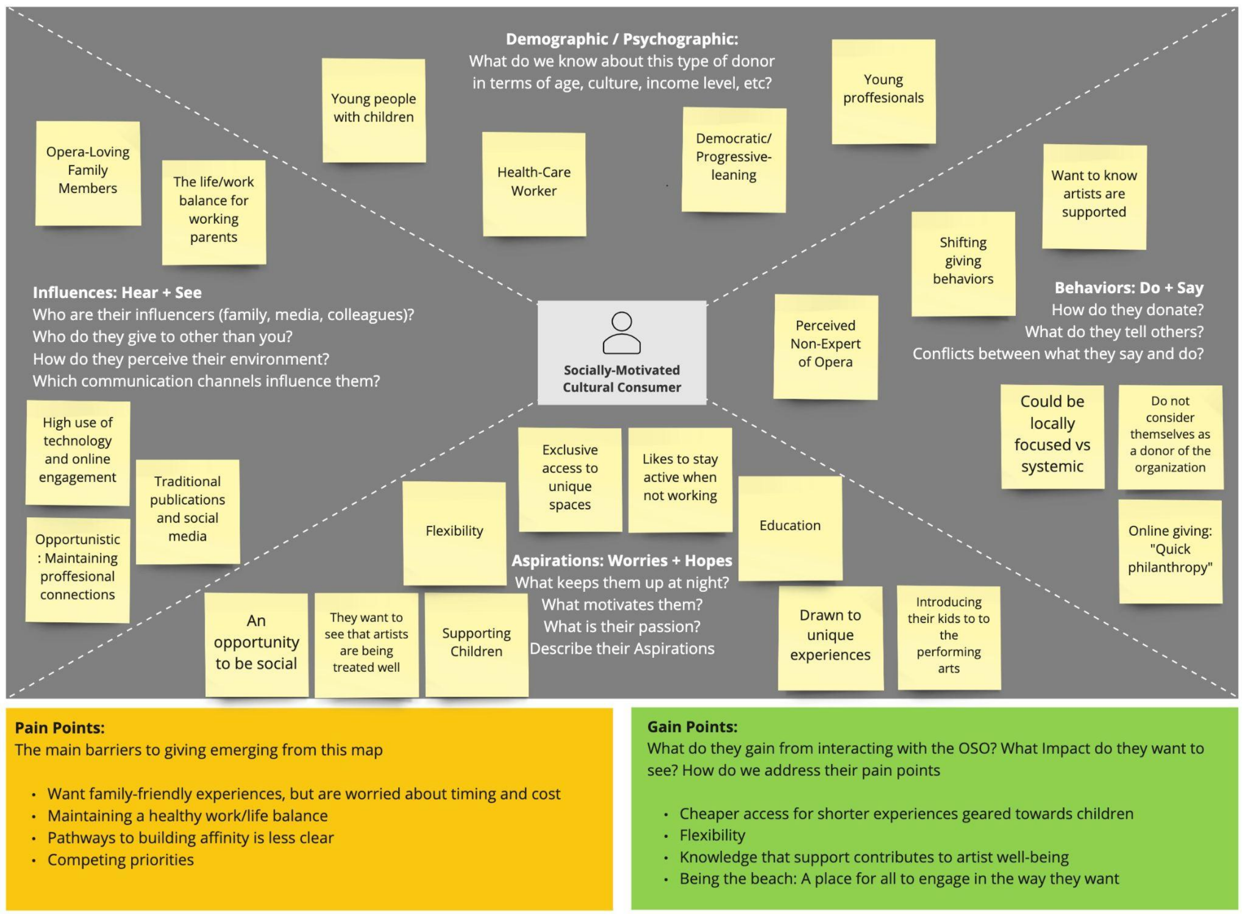
Appendix C - 1: "Established Opera Lover" Persona

Members of the team filled out this canvas around the "Established Opera Lover" to serve as an example for the client ahead of the empathy mapping brainstorming session the team facilitated with members of OSO staff.



Appendix C - 2: “Socially-Motivated Cultural Consumer” Persona

For the purposes of demonstrating this process for the client, the team facilitated a brainstorming session with OSO’s executive director and development manager and based the brainstorming session around the “Socially Motivated Cultural Consumer.”



Appendix D: National Benchmarking Research

The following section provides an overview of each of the thirteen national organizations that were benchmarked and the matrix used to compare each organization.

Appendix D - 1: Case Study Research

Organization #1: Attack Theatre

Location: Pittsburgh, Pennsylvania

Website: attacktheatre.com

Mission: Attack Theatre builds community with artists and audiences through the process and production of personal, accessible dance-based performance. Blending varied art forms with dynamic contemporary dance, Attack Theatre creates passionate portrayals of everyday life.[155]

What They Do: Founded in 1994 as a collaboration between two Pittsburgh-based dancers, Attack Theatre is a unique dance company. Attack fuses modern dance, original live music, and interdisciplinary art forms. It has a great summary on its website that gives a philosophy behind its work: “We are a company of artists, doers, thinkers, risk-takers, dancers, administrators, entrepreneurs, and makers. We make dance. We engage audiences. We inspire children. We interact with our surroundings. We crave adventure, a good challenge, and achieving something just out of our reach. And we love the journey as much as the destination.”[156] Looking at the current season, Attack Theatre is presenting around six pieces.[157] In 2020, Attack Theatre acquired a space in the Pittsburgh neighborhood of Lawerenceville. In this space, Attack has created areas for performances, rehearsals, and game nights, and describes the place as a hub to “support the artistic endeavor of the community.”[158]

Ways They Engage Audiences: Currently, Attack is giving both live-streamed and in-person performances, creating an interesting duality for presentation in a post-pandemic environment. Of course, Attack Theatre is at an advantage because its work is solely original and is not hindered by making its work available to the public online.[159]

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[155] “About.” Attack Theatre, accessed May 2, 2022, https://www.attacktheatre.com/about-company.
[156] “Company.” Attack Theatre, accessed May 2, 2022, https://www.attacktheatre.com/company.
[157] “2021/2022 Season.” Attack Theatre, accessed May 2, 2022, https://www.attacktheatre.com/season-27.
[158] “Studio 212.” Attack Theatre, accessed May 2, 2022, https://www.attacktheatre.com/212.
[159] “2021/2022 Season,” Attack Theatre.

One of the core pillars of Attack Theatre's work is serving the community. On the website, Attack acknowledges this by saying: "We do not make art in a vacuum, nor do we build programs in the dark." [160] They seek to become the "Epicenter of dance, learning, and creative community collaborations."[161] Attack also engages with educational programming by having a dedicated classroom environment for after-school workshops, technique classes, and Creative Movement summer camps. One of the most interesting design elements in their new space is the inclusion of a veranda. This outdoor space is supposed to be an "idea playground" to help brainstorm new programs, celebrate success, or even adjust the course of action.[162]

In the past, Attack Theatre has partnered with organizations including Stanwood Elementary School, Southern Alleghenies Museum of Art, Pittsburgh Symphony Orchestra, Creative Citizen Studios, Pittsburgh Public Schools Early Childhood Program, and Millvale Community Library. In addition, it has created drives with several food pantries.[163]

Ways They Engage Donors: Attack's current campaign is focused on the work that's happening after building a space for their company. The campaign focuses on reiterating the value of Attack as an organization on the donation page: "There is still much we need to do. We will continue to invest in the people and programming we need to grow a space to gather, learn, and make art. Attack Theatre is more than just a dance company."[164] Attack also has a volunteer page, where patrons can send their information directly to the organization to volunteer.

Similarities and Differences to On Site Opera: Prior to 2020, Attack Theatre did not have a permanent home. The company bounced from performing venue to performing venue, and the work was influenced by the space in which they inhabited. Some similarities between the two include centering work in the community where they reside, as OSO has done with *Amahl and the Night Visitors,* where it partners with two local NYC organizations that serve unhoused populations. The key differences between the organizations is the type of art that each company presents and the fact that Attack does not do site-specific work. Now that Attack has a permanent venue, part of the earned income for the organization comes from renting out the space.

[160] "Attack Theatre's New Home." Attack Theatre, accessed May 4, 2022, https://www.attacktheatre.com/212.
[161] "About," Attack Theatre.
[162] "Studio 212," Attack Theatre.
[163] "Creative Connections." Attack Theatre, accessed May 2, 2022, https://www.attacktheatre.com/creative-connections.
[164] "Donate." Attack Theatre, accessed May 2, 2022, https://www.attacktheatre.com/donate.

Organization #2: Bated Breath Theater Company

Location: New York City, New York

Website: batedbreaththeatre.org

Mission: No traditional mission, but something of a manifesto:

- The Spark - we believe in sparking passion within and between our actors and audiences.
- The Fire - we believe that theatre can - and ought to -set audience members' souls afire.
- The Space - we believe that performance can happen anywhere. The space itself is our muse, our teacher, and our scene partner.[165]

What They Do: Founded in 2008, Bated Breath Theatre Company began its site-specific work in Hartford, Connecticut. The work it initially produced were reinterpretations of classic works such as *A Doll's House* as well as experimental and contemporary works. A primary goal of the company is to create an interactive theatre experience that "blur[s] the distinctions between audience, performer, and location."[166] Some of the locations where Bated Breath has performed include art galleries, museums, and other public places.[167] In terms of subject matter and audience for its current work, Bated Breath focuses on issues of social justice, recently creating a piece focusing on racial justice and LGBT rights. In addition, Bated Breath has created family-friendly works, including a production based on the popular children's book *Where the Wild Things Are* that utilized puppetry and music. Another venture that Bated Breath has taken part in is the creation of the Physical Theatre Training Center for Actors.[168]

Ways They Engage Audiences: There is no information about additional ways to engage the community surrounding Bated Breath Theatre in relation to its performances. Additionally, it seems like the company has made a transition to a different community altogether, moving from Hartford, Connecticut to New York, New York. One unique offering, however, from Bated Breath Theatre is the corporate events with the Physical Theatre Training Center for Actors.[169]

Ways They Engage Donors: There is very little on Bated Breath's website about its donor practices. The tab on the website leads only to a Giving Tuesday page. In addition, the

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[165] "About Us." Bated Breath Theatre Company, accessed May 2, 2022, https://www.batedbreaththeatre.org/about.
[166] "About Us," Bated Breath Theatre Company.
[167] "About Us," Bated Breath Theatre Company.
[168] "Our Productions." Bated Breath Theatre Company, accessed May 2, 2022, https://www.batedbreaththeatre.org/productions.
[169] "Our Productions," Bated Breath Theatre Company.

company does not make a strong case for why donors should give or elaborate on its donation practices in general.[170]

Similarities and Differences to On Site Opera: One of the key similarities between both companies is the production of site-specific works. In addition, their values seem very similar, with both OSO and Bated Breath creating works around the Black American experience in collaboration with other institutions. Both have also created family-friendly works. However, Bated Breath does not seem to have as detailed a donation page and its policies are not as clear.

Organization #3: Heartbeat Opera

Location: New York City, New York

Website: heartbeatopera.org

Mission: Heartbeat Opera creates incisive adaptations and revelatory arrangements of classics, reimagining them for the here and now. Our new, interdisciplinary collaborations expand the boundaries of what opera can be. Grounded in the belief that excellent opera-making should build community and radiate beauty, we work toward an equitable and inclusive future for our art form, centered in love.[171]

What They Do: Heartbeat Opera takes opera classics and reimagines them for the current age. Along with modern costuming, the music is arranged in-house for non-traditional orchestras. Heartbeat performs its operas at various venues around NYC in order to make opera more relevant and accessible for current audiences.[172]

Ways They Engage Audiences: Heartbeat engages audiences through its non-traditional opera performances. While it has staged re-imaginings of several classics including *Carmen*, *Fidelio*, and *Madama Butterfly*, Heartbeat also presents more contemporary and new works. It created unique online content like "*Breathing Free: A visual album*" during the pandemic and partnered with local schools to introduce opera to the next generation. Heartbeat also hosts an annual Halloween Drag Extravaganza that puts a fun twist on opera and theatre classics.[173]

Ways They Engage Donors: Heartbeat's website has a dedicated "Support" page where donors can click to donate online or find information for mailing a check. There are also

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[170] "Donate." Bated Breath Theatre Company, accessed May 2, 2022, https://www.batedbreaththeatre.org/donate.

[171] "Mission." Heartbeat Opera, accessed May 2, 2022, https://www.heartbeatopera.org/mission.

[172] "Mission," Heartbeat Opera.

[173] "Past Productions." Heartbeat Opera, accessed May 2, 2022, https://www.heartbeatopera.org/past-productions.

"donate" buttons on various pages throughout the website to encourage visitors to give. Additionally, there is an option to join the mailing list at the bottom of each page of the site and a contact page to engage with the organization further.[174]

Similarities and Differences to On Site Opera: Both are opera organizations in NYC that stage reimagined versions of classic operas alongside contemporary works. Both are committed to equity and inclusion in the industry and provide statements regarding their efforts to engage in more equitable, diverse works; Heartbeat has a page with a posted statement dated from July 2020.[175] Neither organization has a permanent venue, although Heartbeat tends to perform in more traditional spaces. Both organizations have ample opportunities for visitors to their website to donate online and to connect with the organization through regular emails or newsletters if they so choose. Heartbeat is a bit younger than OSO, being in existence since 2015.[176] It is also not site-specific although Heartbeat performs in different venues around NYC and beyond. It has taken some of its shows on tour to Kennedy Center and performing venues in CA and AZ.[177]

Organization #4: Lighthouse Opera

Location: New York City, New York

Website: lighthouseopera.org

Mission: To establish an opera repertory company that chiefly performs standard operas, in their original languages, in diverse settings throughout the Bronx, and beyond.[178]

What They Do: Lighthouse Opera seeks to bring in new and diverse audiences from around the Bronx by "help[ing] [to] shine a light on classically trained singers of all backgrounds by performing operas in their original language for new and diverse audiences in the Bronx, New York and beyond."[179] Lighthouse has performed traditional operas by Mozart and Verdi in recent years, and it has a production of La Traviata scheduled for June 2022.[180]

Ways They Engage Audiences: Lighthouse Opera, based on its website, only presents opera performances at locations like NYC's OPERA America and the Bronx's Hackl Hall of

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[174] "Support." Heartbeat Opera, accessed May 2, 2022, https://www.heartbeatopera.org/support.

[175] "EDI & Anti-Racism." Heartbeat Opera, accessed May 2, 2022, https://www.heartbeatopera.org/edi.

[176] "Mission," Heartbeat Opera.

[177] "Past Productions," Heartbeat Opera.

[178] "Lighthouse Opera Company." Guidestar, accessed May 2, 2022, https://www.guidestar.org/profile/81-4729519.

[179] "Home." Lighthouse Opera Company, accessed May 2, 2022, http://lighthouseopera.org/home.html.

[180] "Opera Bronx | Musical Performances." Lighthouse Opera Company, accessed May 2, 2022, http://lighthouseopera.org/seasons.html.

the Fordham United Methodist Church.[181] There are no educational or supplemental activities listed.

Ways They Engage Donors: Immediately upon visiting the website, donors are encouraged to give to “Help Fund Our Opera Performances.” There is a “donate” button but donors can also text to give via the phone number listed on the page. This page also lists donor tiers of sorts from Publicity Support to Corporate Sponsor.[182]

Similarities and Differences to On Site Opera: Both organizations are located in NYC, so they may share some donors and patrons in the city. Both do not have permanent venues, moving around the city when a performance is staged. Lighthouse is also very young, having been founded in 2017, 5 years after OSO was founded in 2012.[183] In general, Lighthouse Opera seems to be less established and doesn’t seem to perform as consistently or as often as OSO. It is also not site-specific, even though it does not have a permanent venue. Lighthouse is also a somewhat smaller organization, with an even more limited capacity than OSO which certainly impacts the number of events and types of programs that it is able to offer. Additionally, there are no clearly stated values that could be compared to the values held by OSO.

Organization #5: Linked Dance Company

Location: New York City, New York

Website: linkeddancetheatre.com

Mission: Artistry should be found everywhere, not just inside the 4 walls of a theater, but in odd and amazing spaces. We are a collaborative company that builds work using multiple mediums to immerse people in stories with a true narrative. We draw inspiration not only from the movement-based immersive companies that have come before us, like Punchdrunk and Third Rail Projects, but from the likes of Situationist International to construct stories and situations that are "reawakening and pursuing authentic desires, experiencing the feeling of life and adventure, and the liberation of everyday life." Through the types of performances we build, we hope to engage audiences in stories that are often left untold by working with diverse artists and writing diverse characters for uncharted landscapes.[184]

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181 “Opera Bronx | Musical Performances,” Lighthouse Opera Company.

182 “Support.” Lighthouse Opera Company, accessed May 2, 2022, http://lighthouseopera.org/support.html.

183 “Lighthouse Opera Company,” Guidestar.

184 “About.” Linked Dance Theatre, accessed May 2, 2022, http://www.linkeddancetheatre.com/about.

What They Do: LDC is a small dance company that pushes the boundaries of traditional dance and theatre. Initially conceived in the early 2000s, the company makes stories come to life through dance, theatre, music, text, and other artistic mediums. Like This is Not A Theatre Company, also included in the benchmark, LDC seeks to subvert what people think of as a dance company to create immersive experiences that question how stories can be told and what it means to be human.[185]

Ways They Engage Audiences: LDC's main engagement methods are through its immersive dance-theatre productions, performed at locations throughout NYC. Most productions are in-person, although the company did create two virtual productions during COVID, one of which was a four-episode production exploring love and memory.[186] Its most recent production is semi-private, allowing only 3 viewers to be present at the performance for a highly-interactive experience. Audiences have to book their "appointment" for *The Incomplete Collection*.[187] Each production description is written in such a way that the audience is part of the story - not just being told what the story is about.[188] Beyond productions, LDC offers consulting services to other companies/shows to help them create intimate, immersive experiences. It also offers tailored masterclasses and workshops on dance-theatre, immersive experiences, and techniques for innovative choreography.[189]

Ways They Engage Donors: There is no donation button on the LDC website, and the only reference to donations is made for its virtual production *What Real People Do 2020* where audiences can give through the Fractured Atlas donation page. Otherwise, it doesn't seem to fundraise, although interested individuals can subscribe and receive email updates.[190]

Similarities and Differences to On Site Opera: Both organizations are small, experimental arts organizations located in NYC. Like OSO, LDC utilizes different spaces throughout the city to host its unique artistic product, dance-theatre. Both organizations also share an interest in telling underrepresented stories and giving diverse artists the chance to participate in their productions. They both push the boundaries of a traditional art form to make it more engaging and accessible for a wider audience. LDC is sponsored by Fractured Atlas, meaning the organization doesn't seem to have a donation structure like OSO or Guidestar documentation to pull from. LDC also focuses on dance and theatre and is not particularly "site-specific" although it does stage performances in different venues around the city. Its work also seems to be all original, rather than a balance of contemporary and re-imagined works like OSO presents.

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185 About," Linked Dance Theatre.

186 "LRPD 2020." Linked Dance Theatre, accessed May 2, 2022, http://www.linkeddancetheatre.com/lrpd-2020.

187 "The Incomplete Collection." Linked Dance Theatre, accessed May 2, 2022, http://www.linkeddancetheatre.com/incomplete-collection.

188 "Our Work." Linked Dance Theatre, accessed May 2, 2022, http://www.linkeddancetheatre.com/allourwork.

189 "Home." Linked Dance Theatre, accessed May 2, 2022, http://www.linkeddancetheatre.com/.

190 "Home," Linked Dance Theatre.

Organization #6: Opera on Tap

Location: New York City, New York; chapters located nationally and internationally

Website: operaontap.org

Mission: To expose new audiences to opera and classical music by taking opera and classical music out of the concert hall and performing it in alternative venues, to aid young performers in their development by giving them the opportunity to perform and to promote and support them through our organization and to help promote new classical works of contemporary classical and operatic composers.[191]

What They Do: Started in 2005 at a Brooklyn location called Freddy's Bar and Backroom, Opera on Tap was later incorporated and grew in size to become a chapter-based organization in locations across the world. Opera On Tap promotes opera as a "viable, living, and progressive art form" and works "to support the developing artists who continue to keep the art form alive."[192] There is also an emphasis on telling the stories of marginalized people through its work.

Ways They Engage Audiences: Opera on Tap is a producing organization with an incredible variety of programming such as Opera at the Bar, New Brew, Playground Opera, Immersive Opera Project, The OPERACADES, as well as online streaming programs.[193]

Ways They Engage Donors: There is little on the website of the organization regarding its fundraising practices. What is currently available is a recent campaign for 25 Days of Giving, hosted through Give Lively. There is also a PayPal association with the donation page.[194]

Similarities and Differences to On Site Opera: Both OSO and Opera on Tap are engaged with the unconventional presentation of opera in non-traditional spaces. As determined by an analysis of OSO's market, both organizations also attract similar audiences. Having opera performed in a bar for young adults and on playgrounds for families with young children brings in diverse audiences that both organizations would want to engage. The key difference between OSO and Opera on Tap is the size and specific markets of the organization. While Opera on Tap began in NYC, it's grown far beyond the NYC market and operates in a chapter setting. There is a clear difference in the size of the organizations but the similar programming makes Opera on Tap a fair comparison for OSO.

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[191] "About Us." Opera on Tap, accessed May 2, 2022, https://operaontap.org/about/.
[192] "About Us," Opera on Tap.
[193] "Core Programs." Opera on Tap, accessed May 2, 2022, https://operaontap.org/programs/.
[194] "Donate." Opera on Tap, accessed May 2, 2022, https://operaontap.org/donate/.

Organization #7: Opera Parallèle

Location: San Francisco, California

Website: operaparallele.org

Mission: Merges tradition with innovation to re-invent the power of opera in our modern world.[195]

What They Do: Opera Parallèle is a young opera company that operates in the San Francisco/Bay Area. It produces both traditional and contemporary pieces of opera, with the 2020 season featuring a libretto of *La Belle et La Bete* and a new piece entitled *Harvey Milk*, which centers on the life of America's first openly gay elected official.[196]

Ways They Engage Audiences: Opera Parallèle has collaborated with organizations such as The Transgender District, San Francisco's Gay Men Chorus, and Ruth's Table as community partners.[197] It states on Opera Parallèle's website that it has a commitment to having a lasting relationship with the BIPOC and LGBTQ communities in the city.[198] Opera Parallèle's education program, Hands-On Opera gives students a chance to participate in creating and performing an opera while also providing opportunities for young composers, librettists, and creatives through commissioning new works for younger audiences.[199]

Ways They Engage Donors: Opera Parallèle lists on its website institutional support and all of the supporters who give a sum of $1,000 or more to the organization during a certain time period.[200] Opera Parallèle includes many ways to give on its website, including stock options.[201] The benefits are organized by a traditional tiered system. One of the more unique options of donating to this organization included artist sponsorships. Donors have the choice of selecting a particular artist they wanted to support over the course of the season; each tier of contribution affords the donor different levels of access to the creative process, including invitations to rehearsals.[202]

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[195] "Mission, Vision, Values and Goals." Opera Parallèle - San Francisco Contemporary Opera, accessed May 2, 2022, https://operaparallele.org/mission/.

[196] "2021 | 2022 Season." Opera Parallèle - San Francisco Contemporary Opera, accessed May 2, 2022, https://operaparallele.org/2021-2022/.

[197] "The Bullhorn - OP's Community Programs." Opera Parallèle - San Francisco Contemporary Opera, accessed May 2, 2022, https://operaparallele.org/thebullhorn/.

[198] "The Bullhorn," Opera Parallèle.

[199] "Hands-on-Opera." Opera Parallèle - San Francisco Contemporary Opera, accessed May 2, 2022, https://operaparallele.org/hands-on-opera/.

[200] "Our Supporters." Opera Parallèle - San Francisco Contemporary Opera, accessed May 2, 2022, https://operaparallele.org/our-supporters/.

[201] "Ways to Give." Opera Parallèle - San Francisco Contemporary Opera, accessed May 2, 2022, https://operaparallele.org/ways-to-give/.

[202] "Artist Sponsorship 2021 | 2022." Opera Parallèle - San Francisco Contemporary Opera, accessed May 2, 2022, https://operaparallele.org/artistsponsor/.

Similarities and Differences to On Site Opera: Opera Parallèle shares a list of similar values with OSO and an emphasis on making opera pieces for young audiences. There is also a similarity in partnering with community organizations for pieces that have a particular social justice focus. In terms of fundraising, OSO and Opera Parallèle are similar in their use of a tiered donation system. The key difference between these organizations is that Opera Parallèle's tiers mostly center around artist support. This is an interesting way to directly engage donors and show tangible proof that their money has been used to serve the organization's mission.

Organization #8: Pacific Opera Project

Location: Los Angeles, California

Website: pacificoperaproject.com

Mission: To provide quality opera that is innovative, affordable, and entertaining in order to build a broader audience.[203]

What They Do: Founded in 2011, Pacific Opera Project describes its purpose as "bringing accessible, affordable, and entertaining opera to audiences across Los Angeles."[204] In their eleven-year history, they have produced forty-three operas in the city; many of these are in theatrical venues like amphitheaters, but they have also produced operas in places like Forest Lawn Cemetery, warehouses, and small clubs.[205]

Ways They Engage Audiences: Pacific Opera Project makes its productions accessible by posting the majority of its work on YouTube, allowing people who have not seen the work to watch and inviting those who were not able to afford a ticket a chance to view the performances.[206] It also hosts education programs that serve students and community members via live and digital events.[207]

Ways They Engage Donors: There is little information about fundraising campaigns listed on the website, but there is a button directly on the website. There does not appear to be a tiered system for donations.[208]

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[203] "About." Pacific Opera Project, accessed May 2, 2022, https://www.pacificoperaproject.com/about.
[204] "About," Pacific Opera Project.
[205] "Production History." Pacific Opera Project, accessed May 2, 2022, https://www.pacificoperaproject.com/production-history.
[206] "Production History," Pacific Opera Project.
[207] "Education." Pacific Opera Project, accessed May 2, 2022, https://www.pacificoperaproject.com/education.
[208] "Donate. Pacific Opera Project, accessed May 2, 2022, https://www.pacificoperaproject.com/donate.

Similarities and Differences to On Site Opera: Although to a much lesser extent than OSO, the Pacific Opera Project has produced some of its pieces in less-than-conventional spaces, including a cemetery. However, from glancing at some of the production videos that were made accessible on its website, it appears that there is a more conventional production standard, with lavish sets. Both organizations seem to aim their programming toward younger audiences, with very lively re-imaginings of pieces. Both also value uplifting the voices of marginalized communities; Pacific Opera Project does this by commissioning pieces such as this season's work *I Can't Breathe* which reckons with the police brutality in the United States aimed toward Black citizens.

Organization #9: Pittsburgh Festival Opera

Location: Pittsburgh, PA

Website: pittsburghfestivalopera.org

Mission: Pittsburgh Festival Opera presents innovative opera, producing American works, reinterpretations of older works, and new works, for the widest possible audience. The company focuses on diversity in programming and casting, on crossing boundaries and bringing together talents from all the arts, on encouraging new talent, and on broadening audiences through outreach and education, to create a body of work that is original, entertaining, contemporary, and relevant. Pittsburgh Festival Opera brings the power of world-class performances to humanize, energize and re-define opera as an experience that is up-close and personal, approachable, and relevant to today's audiences. We break boundaries in the arts, bringing together audiences and artists of all backgrounds to engage in experiences that inspire and enthrall.[209]

What They Do: PFO is a small opera company that presents both contemporary and traditional operas in new ways at a variety of venues around Pittsburgh. It also, prior to the pandemic, revolved around a summer festival season but has since re-branded to be a more year-round opera presenting organization. Recent events include a filmed version of the contemporary opera *Lysistrata* as part of the summer artist residency program in 2021 and a Christmas concert presented in December 2021. Season details for 2022 are upcoming.[210]

Ways They Engage Audiences: PFO focuses heavily on educational programming. There are several programs including Opera Tots! for K- 1 students, Opera in the Neighborhood which brings opera performances to community elementary schools, Opera Your Way

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[209] "About." Pittsburgh Festival Opera, accessed May 2, 2022, https://pittsburghfestivalopera.org/about/.

[210] "Performances & Tickets." Pittsburgh Festival Opera, accessed May 2, 2022, https://pittsburghfestivalopera.org/upcoming/performances-tickets/.

provides workshops for middle school students, and a partnership with Buzzword Pittsburgh that provides children 0-5 with activities combining the arts and vocabulary/language arts skills.[211] PFO also hosts a yearly gala event and has held recital performances at a lower cost than full productions at various locations around the community.

Ways They Engage Donors: PFO works to engage Board members in organizational giving, such as through a team fundraising event during the spring of 2021.[212] It has a "donate" button clearly accessible on its website where donors can make a contribution at any time. Donors are also able to donate at the time of ticket purchase. Larger donor events include an annual appeal, Giving Tuesday, and smaller fundraising events in the spring and summer. PFO also has a recurring gift program (monthly, rather than yearly, installments), donor tiers (from <$100 to $25,000+), and an "Artistic Director's Council" that gives those particular donors certain perks.[213]

Similarities and Differences to On Site Opera: Both PFO and OSO are similarly-sized organizations and do not have a permanent performance space. PFO's current donor model is similar to that of OSO, having some monthly recurring donors, general donor tiers, and opportunities to donate online or at ticket check-out. However, PFO is a much older organization and relies on an even smaller staff than OSO. It also engages in far more educational programming than OSO, reaching donors and patrons through different means. PFO is also not a particularly site-specific organization, although it doesn't have a permanent space. Finally, PFO does not have publicly stated visions or values from which to compare with OSO's.

Organization #10: Rhymes with Opera

Location: New York City, New York; Baltimore, Maryland

Website: rhymeswithopera.org

Mission: Rhymes With Opera is an ensemble of performers and composers that expands the repertory of contemporary opera by commissioning, developing and staging new chamber works.[214]

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211 "Education." Pittsburgh Festival Opera, accessed May 2, 2022, https://pittsburghfestivalopera.org/education/.

212 Pittsburgh Festival Opera. "And the winner of our Spring into Summer fundraiser is……." Facebook, May 17, 2021, https://www.facebook.com/pittsburghfestivalopera/photos/a.10150146954341974/10159479281786974/.

213 "Donate." Pittsburgh Festival Opera, accessed May 2, 2022, https://pittsburghfestivalopera.org/donate/.

214 "Rhymes With Opera." Guidestar, accessed May 2, 2022, https://www.guidestar.org/profile/83-2194570.

What They Do: Rhymes with Opera self produces work as a "contemporary opera machine"[215] by commissioning and producing works that are performed by the established company. Seventeen total operas have been commissioned by Rhymes with Opera. These include a variety of performances from one-minute signature pieces, to evening-length productions.[216] The company does not have a permanent address or venue, serving both the communities of Baltimore and New York City.

Ways they Engage Audiences: Rhymes with Opera engages audiences with contemporary opera productions staged in intimate venues or, in the recent past, online.[217] They have also hosted a Pocket Opera Workshop to engage six composer fellows to work on their skills and craft short, original compositions for RWO ensemble vocalists.[218]

Ways They Engage Donors: No available information on their donation structure.

Similarities and Differences to On Site Opera: Many of the artistic functions of Rhymes with Opera have similarities to OSO. Both organizations are looking for ways to produce opera that is "outside the box." They innovate beyond the rigid conventions typically associated with the art form. Rhymes with Opera is also a relatively young organization, founded in 2007.[219] It has some years on OSO, but not many. The size of the board of directors and the advisory board are comparable to OSO as well. Like OSO, Rhymes with Opera has no permanent venue from which they perform; productions have been produced in places like Inwood Hill Park in New York and Gwynn Falls Leakin Park in Baltimore.[220] Of note, Rhymes with Opera differs from OSO because it serves two markets—NYC and Baltimore— which provides its own unique challenges when it comes to maintaining engaged audiences and donors. The season is also much shorter for Rhymes with Opera, only consisting of one or two performances.

Organization #11: This is Not a Theatre Company

Location: New York City, New York

Website: thisisnotatheatrecompany.com

Mission: From the company Manifesto: "This Is Not A Theatre Company creates site-based, interactive, multi-sensory, participatory dance-theatre that is smelled, touched, and tasted as well as seen and heard. We use play (as both noun and verb) to foster critical thinking,

[215] "Who We Are." Rhymes With Opera, accessed May 2, 2022, https://www.rhymeswithopera.org/about-us.
[216] "Who We Are." Rhymes With Opera.
[217] "Who We Are." Rhymes With Opera.
[218] "Pocket Opera Workshop," Rhymes With Opera, accessed May 2, 2022, https://www.rhymeswithopera.org/pow.
[219] "Who We Are." Rhymes With Opera.
[220] "Who We Are." Rhymes With Opera.

multi-sensory full-bodied engagement, and radical empathy. Our work is not passively consumed; audiences co-create with us and, in doing so, actively practice creativity."[221]

What They Do: This is Not a Theatre Company is a contemporary theatre company that creates site-specific, engaging works to fully engage audiences with all five senses. It has a posted "Manifesto" that speaks to its unique understanding of what theatre should be and do; this is outside of the traditional realm for theatre spaces.[222] Its first production took place in 2014 and it has several currently ongoing projects.

Ways They Engage Audiences: TINATC's business model is built on outstanding audience engagement via non-traditional presentations either in a digital format or in a non-traditional location. Its first show, *A Serious Banquet* (2014), gave "partygoers" an interactive experience with performers in a Picasso-inspired, Cubist-themed environment. Another production, *Pool Play* presented in 2014 and again in 2017 took place in a pool with audience members sitting along the edges, able to dip their toes in and become a part of the exploration of "America's long, joyful, and complicated relationship with water, swimming, and pools."[223] Even prior to the pandemic, the company produced several "podplays," many of which are still available on the website for free or at a low cost.

Ways They Engage Donors: Donors are able to find a space to donate on the "Current Projects" page about halfway down the webpage. Donors can then click the button to give a one-time or a monthly gift. Because TINATC is fiscally sponsored by Fractured Atlas, the donations are tax-deductible, but it seems like this online donation tool is the main donation method. Those interested in the company can also join TINATC's mailing list or contact the company directly for more information.[224]

Similarities and Differences to On Site Opera: Both organizations are site-specific and perform in non-traditional spaces. There is an experimental aspect to its work and engagement is created by offering a unique experience to the audience. And although they are somewhat different, both organizations have clearly defined values (in the form of a manifesto for TINATC) that outline its approach to its work and what the organizations stand for. However, TINATC is sponsored by a larger organization, Fractured Atlas. This means it doesn't have a robust fundraising plan—at least not one that is available on its website—and no form 990 to look at to get a sense of its finances. This also means it has a very different fiscal model than OSO which impacts the ways in which it produces work.

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221 "Manifesto," This is Not a Theatre Company.

222 "Home." This is Not a Theatre Company, accessed March 28, 2022, https://www.thisisnotatheatrecompany.com/.

223 "Production History." This is Not a Theatre Company, accessed May 2, 2022, https://www.thisisnotatheatrecompany.com/production-history.

224 "Current Projects." This is Not a Theatre Company, accessed May 2, 2022, https://www.thisisnotatheatrecompany.com/current-projects.

Organization #12: Quantum Theatre

Location: Pittsburgh, Pennsylvania

Website: quantumtheatre.com

Mission: Quantum Theatre is a company of progressive, professional artists dedicated to producing intimate and sophisticated theatrical experiences in uncommon settings, exploring universal themes of truth, beauty, and human relationships in unexpected ways.[225]

What They Do: Quantum Theatre creates theater pieces that exist in non-traditional spaces around the Pittsburgh area that usually relate to the work they are presenting (ex. Schenley Park, abandoned tech space, former YMCA). They have been in operation since 1990, and have produced an average of three performances a year. During the COVID-19 pandemic, Quantum maintained a digital season.[226]

Ways they Engage Audiences: For every production, there are a variety of events that Quantum hosts to engage different types of audiences. These include talkbacks, community nights, wine-tasting events, and a gathering at a local bar. Each of these events is connected to a business that is located in the community in which the company has temporarily relocated. In addition to these events, Quantum Theatre has a high school-centric education program. This program invites artists into four inner-city schools to help the students reflect on material related to the play currently in production. After several weeks of study, the students attend a special matinee performance of the current production.[227]

Ways they Engage Donors: There are six donation tiers available on the website. The specific benefits of each tier are not directly listed, but the highest tier—those who give $2,500 and above—are featured on the organization's websites.[228] Quantum Theatre also has a lot of transparency about donating time to the organization, listing the qualifications and responsibilities of different types of volunteers.

Similarities and Differences to On Site Opera: The major similarities between OSO and Quantum include the style in which the organization operates. Both Quantum and OSO are site-specific performing arts organizations that utilize the story they are telling and its connection to the place in which it is staged. They also both use a tiered donor system, but Quantum's tiered system's highest levels would be what OSO would consider mid-level

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[225] "What We Are." Quantum Theatre, accessed May 2, 2022, https://www.quantumtheatre.com/about/what-we-are/.
[226] "Past Productions." Quantum Theatre, accessed May 2, 2022, https://www.quantumtheatre.com/past-productions-2/.
[227] "Educational Programs." Quantum Theatre, accessed May 2, 2022, https://www.quantumtheatre.com/educational-programs/.
[228] "Individual Giving." Quantum Theatre, accessed May 2, 2022, https://www.quantumtheatre.com/individual-giving/.

donors. Key differences between the organizations include the age—Quantum has two additional decades over OSO—and the genre of performance.

Organization #13: UrbanArias

Location: Washington, D.C.

Website: urbanarias.org

Mission: To expose DC-area audiences to engaging, accessible, and entertaining contemporary operas; to enable both established and emerging composers to present shorter works, to commission new operas; and to bring new audiences to opera.[229]

What They Do: UrbanArias is a contemporary opera organization located in Washington, D.C. that commissions pieces that speak to current topics of conversation and the location of the work. Per their "About" page, they have "demonstrated a commitment to the highest quality of musical and theatrical performances." [230]They have presented 25 operas, including 11 world premieres (9 of which were commissioned by the organization.)[231] One of these pieces focused on the story of the Unknown Soldier, reflecting the tomb and monument in the nearby Arlington National Cemetery.[232] One of the unique features of UrbanAruas is their secondary programming including "Opera Improv" and digital content.[233] They also "[work] to build deeper connections with community partners through interview and discussion panels and artistic and social collaborations."[234]

Ways They Engage Audiences: Limited information regarding additional programming, such as gala events, education programs, etc.

Ways They Engage Donors: UrbanArias operates under a tiered donation system, with the membership benefits outlined on their support page. The benefits that it lists are fairly consistent with other opera organizations of a similar size, including direct communications, opportunities to participate in events, and behind-the-scenes activities. UrbanArias also offers both one-time and recurring donations as part of its donation system on its website.[235]

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229 "Urbanarias Inc.." Guidestar, accessed May 2, 2022, https://www.guidestar.org/profile/27-1201798.

230 "About." UrbanArias, accessed May 4, 2022, https://www.urbanarias.org/about/.

231 "About," UrbanArias.

232 "About," UrbanArias.

233 "About," UrbanArias.

234 "About," UrbanArias.

235 "Membership." UrbanArias, accessed May 2, 2022, https://www.urbanarias.org/support/membership/.

Similarities and Differences to On Site Opera: Both OSO and UrbanArias are small-level opera companies that focus on opera pieces that speak to the moment and place where they are created, with a similar site-specific model. Also, UrbanArias and OSO share similar values of creating pieces that speak to social justice and contemporary issues of diversity, equity, and inclusion. The key difference is the marketing—the population and makeup of the D.C. area is different from Manhattan, and therefore UrbanArias is meeting a different group of cultural consumers.

Appendix D - 2: Benchmarking Matrix

Organization	Location	Population	MSA Level	Age < 15 Years	Non-Permanent Venue	Site Specific Work	Budget ~$1,000,000	Values Publicly Available	DEAI Statement Publicly Available	Currently Active
Attack Theatre	Pittsburgh, Pennsylvania	302,205	1			X	X	X		X
Bated Breath Theater Company	New York, New York	8,400,000	3	X	X	X		X		X
Heartbeat Opera	New York, New York	8,400,000	3	X	X		X		X	
Lighthouse Opera	New York, New York	8,400,000	3	X	X					
Linked Dance Company	New York, New York	8,400,000	3	X	X	X				
Opera on Tap	New York, New York	8,400,000	3	X	X					X
Opera Parelle	San Fransico, California	874,961	2		X		X			
Pacific Opera Project	Los Angeles, California	3,967,000	3	X	X				X	X
Pittsburgh Festival Opera	Pittsburgh, Pennsylvania	302,205	1		X		X			X
Rhymes with Opera	Baltimore, Maryland	609,032	2	X	X					
This is Not a Theatre Company	New York, New York	8,400,000	3	X	X	X		X		
Quantum Theatre	Pittsburgh, Pennsylvania	302,205	1		X	X	X			X
UrbanArias	Washington, D.C.	692,683	2	X	X				X	

Key of MSA Levels (By Population Size)

1 = < 500,000

2 = between 500,000 and 1,000,000

3 = > 1,000,000

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