

RICHMOND SYMPHONY

Development Committee Meeting Notes

Location: Dominion Energy Center

Date & Time: 12/01/2021 @ 12PM

Attendees: John Walker (Chair), Bucci Zeugner, Marcia Thalhimer, Maura Scott, Victoria Cottrell (staff), Frances Sterling (staff)

Apologies: Stuart Blain

1. Welcome from John Walker, Chair. FS explained that Sandra Chase was stepping down for the time being, and the committee members expressed their best wishes to her.
2. John Walker gave an overview of the need and the purpose of this new committee. He explained that the primary purpose of the committee was to support and to enhance the Development staff in its annual and corporate giving efforts by developing and executing a plan to engage the entire board in reaching out directly to donors with whom the board members have relationships.
3. As John further explained, another goal of the committee is to help in creating a culture among the board of active engagement in fundraising efforts. It was also discussed that board members should be identified to help support Lacey in her fundraising efforts, including by making introductions where necessary.
4. It was noted that Lacey, Trish and Elizabeth Cabell Jennings would be invited to these meetings. Prior conflicts had prevented their attendance today. **Action:** FS to send the names of people that Lacey is managing personally to the committee members.
5. The Annual Fund Calendar - FS presented a solicitation cycle calendar which showed which groups of donors would be solicited and when - this included subscribers and lapsed donors. The hope is that the Symphony can increase

annual fund giving at the end of the calendar year. At present, most annual giving is made in June. Such late giving in the year is a problem for cashflow for the organization and does not leave time in the year for cultivation of new donors as focus is on the year-end solicitation. It was noted that the board was leading by example in this matter.

6. The CIWR (Contributed Weekly Income Report) was circulated which is made by VC every Tuesday to track contributed income. The committee agreed that this report should be circulated to the committee members on a regular basis.
7. The committee agreed that, if prospective donors on the call list were surprised at being asked to give earlier in the year than usual, the committee members would explain that it was more beneficial for the Symphony to receive annual gifts earlier in the fiscal year when costs are incurred, hence this gradual migration. There was some discussion as to why so much giving was made in June - it was noted that many donors did not have the year-end tax incentive due to their age and circumstance.
8. Discussion was had as to whether the March/April mass solicitation was too late in the year and should be in February. There was concern about leaving enough follow-up time and also clashes with the gala and subscription launch.
9. The committee agreed that a list of prior annual fund donors who had not yet given this fiscal year should be circulated to the full board at the February board meeting. Board members will be asked to sign up to call people on the list whom they know and to make follow-up calls as well.
10. The committee reviewed a list of prior annual fund donors who had not yet made annual gifts after solicitation and a few anomalies. The committee also discussed who could be solicited for a second gift at this time. The committee members signed up to call people on the list, and FS agreed to re-circulate the list by Friday December 3rd. A deadline of Friday December 17th was agreed for all calls to be made and updates sent to FS and VC.
11. The committee thanked John Walker for buying lunch for everyone.