EXECUTIVE SUMMARY

HISTORY

What is the background of our current situation in arts philanthropy?

- Volunteers and donors always existed in the arts, but a planned strategic approach to philanthropy rarely existed in Montréal's arts community.

- Arts and business have a long relationship. The Chambre de commerce du Montréal métropolitain (CCMM) and young philanthropists clubs encourage businesspeople's implication in the arts.

- Recent Québec government policies have motivated growth in funds for projects or permanent endowments through matching and tax credits.

- But, ongoing communities of individual donors engaged with an artistic mission are not well evolved in Montréal's arts organizations.

STRATEGY

How is fundraising viewed in the Montréal arts community?

- Project work structures arts organizations and projects dominate arts fundraising, unintentionally reinforced by public incentive programs.

- Those who begin philanthropy often falsely dream of a single wealthy patron, who appears "deus ex machina" to save the organization.

- Fundraising events are an annual tradition led by businesspeople and board members linked by reciprocity. Visibility and PR are justifications, but with rare impact on mission-oriented philanthropic relationships.

- Those with continuous and year-round presence and direct audience relationships in Montréal can develop an engaged community of individual donors. This is often a different network than the business world who attend benefit events. A few organizations with only occasional presence are engaging their entourage to create donor communities.

CULTURE

How does organizational culture influence philanthropy in the arts?

- A philanthropic culture implies a full organizational commitment. Expertise, organizational and management skills and development time are needed. Some organizations are embracing the process to shape a caring relationally based community of loyal donors.

- By contrast, fundraising is often delegated to one (part-time) employee and possibly an unpaid intern to find corporate partners and organize an event with little additional organizational involvement.

- Boards: despite some individual dedication, potential is limited by constrained personal commitment and lack of philanthropy policies. Understanding business models is helpful. Ongoing renewal of board member mandates reduces an ability to evolve with the community.

PEOPLE

Who needs to be engaged in philanthropy development?

- Strong training, internship mentoring, peer learning and workshops are developing and result in arts professionals in philanthropy.

- Volunteer support varies by arts discipline. Fundraising volunteers care about the mission and may influence others' time and donations.

TOOLS

What support tools are needed for a relational philanthropy approach?

- Integrated databases are essential for strong client relationship development through data analysis. Software in French is essential.

- Collaboration from presenters is required to enable access to approved client information. Thoughtful anticipation could solve some issues.

- Charitable status enables access to government programs, fiscal incentives, major gifts and planned giving as well as foundation funds.
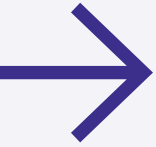
RECOMMENDATIONS

STRATEGY

How can philanthropy evolve long-term arts fundraising in Montréal?

→ Actively evolving relationships with those close to the organization's art and mission can produce committed donors and board members.

→ Use a pertinent case for support to solicit donations instead of benefits.

→ Rely less on business network reciprocity and risky fundraising events.

→ Integrate galas and events into relationship development work.

→ Evolve a long-term relationship strategy with each major donor linked with endowment fund development projects.

CULTURE

How can we manage the change to a philanthropic culture in the arts?

→ Strategically plan to develop a philanthropic culture.

→ Evolve an organizational culture that proudly links philanthropy and artistic craft. Include board members, staff, artists and volunteers in that culture to engage in overall revenue development and donor relationships.

→ Develop philanthropy, ethics and other governance policies to ensure appropriate major and planned giving strategies and capital funds.

→ Develop a change approach that includes small steps and time.

→ Crowdfund projects to generate organizational involvement and giving from cultural workers and artists.

PEOPLE

How can we engage everyone in mission and philanthropy?

→ Train arts professionals as philanthropy professionals to ensure field loyalty and respectful integration of philanthropy inside arts organizations.

→ Evolve a culture of philanthropy through peer learning. Internship, codevelopment and mentoring skills are pertinent.

→ Train philanthropy professionals and senior managers about change.

TOOLS

What additional capabilities and tools are needed?

→ Share information on database management that evolves philanthropy, not just ticket sales. Develop a culture of data analysis and digital literacy to evolve relationships.

→ Invest in the creation of a French-language integrated database software via a community user-group.

→ Negotiate accessibility to audience information with presenters and facilities using techniques that satisfy privacy regulations.

→ Find legal coaching to support charitable status submission.

→ Provide accessible training about matching and fiscal benefits programs.