

# The Eastman **Case Studies**

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## **Laying the Foundation at the San Francisco Girls Chorus**



INSTITUTE FOR  
MUSIC LEADERSHIP



EASTMAN  
SCHOOL OF MUSIC  
UNIVERSITY OF ROCHESTER

# Laying the Foundation at the San Francisco Girls Chorus

Foundations are not-for-profit entities that provide financial support to other organizations or individuals for educational, cultural, scientific, or other charitable purposes. For many musical arts organizations, support from foundations remains an integral source of funding, whether for general operations or for targeted opportunities. The San Francisco Girls Chorus, an internationally renowned performing ensemble and choir training program, receives over 15% of its annual revenue from institutional donors, which includes not only foundations, but also corporations and government agencies. With programs expanding and sometimes unpredictable funders, the executive director of the San Francisco Girls Chorus has charged the development team with strengthening the organization's foundation relations and growing the level of support in this area. This case explores the inner-workings of the organization's interaction with various foundations. After a brief history of the San Francisco Girls Chorus, the case spotlights foundation research conducted by the organization and the steps it has taken to develop relationships with foundations. The case asks the reader to suggest improvements to the foundation review process, identify new foundations, and assess a situation when an organization's programming and fundraising opportunities may be in conflict.

## San Francisco Girls Chorus

This case study was prepared by Eric Michael Laprade. *The Eastman Case Studies* are developed solely as the basis for class discussion. Cases are not intended to serve as endorsements or sources of primary data nor are they to serve as illustrations of effective or ineffective leadership or decision making.

## History

One of the most well-known and highly regarded programs of its kind, the San Francisco Girls Chorus (SFGC) was founded in 1978 by Elizabeth Appling. Appling was inspired to launch the chorus, having witnessed a lack of vocal education opportunities for young women in the San Francisco Bay area, coupled with a strong demand for highly trained female singers from the region's arts organizations. She served as music director of the SFGC from 1978 to 1992. The organization is unique in that it functions as both a professional performing ensemble and a choir school for young women between the ages of 5 and 18. Of particular note in the organization's history are multiple high-profile collaborations and performances. The choir has appeared with the San Francisco Opera, San Francisco Symphony,

Kronos Quartet, New York Philharmonic, Philharmonia Baroque Orchestra, Simón Bolívar Symphony Orchestra of Venezuela, the Mormon Tabernacle Choir, and many others. The choir maintains a close relationship with Michael Tilson Thomas and the San Francisco Symphony, having performed on its Grammy Award-winning recordings of Gustav Mahler's Symphony No. 8 'Symphony of a Thousand' (2009), Mahler's Symphony no. 3 and 'Kindertotenlieder' (2004), Carl Orff's

*Carmina Burana* (1993), and the orchestra's Stravinsky album (2000). The choir can also be heard on the film scores of *The Talented Mr. Ripley* (2000) and *What Dreams May Come* (1998).

The organization's artistic programming is as diverse as its collaborations. Each year, the choir performs

over 100 works, with composition dates spanning over six centuries. Its repertoire ranges from classical and contemporary to folk and world musics and has required engagement with 12 different languages. Empowering young female choristers and highlighting the lyrical quality of the female voice, the SFGC has commissioned and premiered over 30 new works, including compositions by such notable female composers as Meredith Monk, Chen Yi, Libby Larsen, Augusta Read Thomas, Emily Doolittle, and Alice Parker. An organization of international prominence, the SFGC has been invited to perform at the World Choral Symposium in Kyoto, the World Children's Choir Festival in Seoul, and the Gateway to Music Festival in Beijing. In a 2015 review of a collaboration between the choir and the early music ensemble Tenet, *San Francisco Classical Voice* noted: "San Francisco Girls Chorus is a vocal ensemble of immense flexibility with a sound that is both homogenous and distinct. The girls' voices blend beautifully, and the soloists and small ensembles from within the group are excellent. The chorus sang the entire program from memory, and there was neither a note out of place nor did the performance seem over-rehearsed."

Under the current leadership of Lisa Bielawa (Artistic Director), Valérie Sainte-Agathe (Music Director), and Beth Schecter (Executive Director), the organization presents over 70 live performances and reaches more than 50,000 people each year. A diverse cohort of over 300 young women from nine San Francisco Bay counties participate in the SFGC programs. A rigorous, four-level chorus school curriculum prepares students to sing in the premier ensemble of the organization. In addition to

**"The San Francisco Girls Chorus is a treasure. Their training, musicality, and vibrant spirit are evident whenever they perform. I have enjoyed our long association and look forward to many years of collaboration."**

– Michael Tilson Thomas

**The mission of the San Francisco Girls Chorus is to create outstanding performances featuring the unique and compelling sound of young women's voices through an exemplary music education program**

– SFGC Mission Statement

in-house education and performance programs, the Creating Choral Music outreach program, which is offered free to public schools and community centers in the area, reaches over 2,000 students annually.

## Budget

An annual budget of nearly \$2.4 million supports the SFGC operation. Earned income from tuition accounts for 42% of revenue, while another 28% is contributed income from donations. In 2005, the SFGC purchased a building in downtown San Francisco, which was developed into a state-of-the-art facility for the organization, the Kanbar Center for the Performing Arts. The SFGC now generates almost a quarter of its annual revenue from renting out space in the center to other local performing arts organizations such as the Kronos Quartet, American Composers Forum, Chanticleer, San Francisco Boys Chorus, and the San Francisco Opera. An additional 7% of revenue is earned through performances and bookings of the SFGC.

The expenses of the organization are highly streamlined. Three-quarters of spending is given to programmatic offerings and financial aid, with the remaining budget allocated to the organization's administration, development, and facility expenses. The SFGC prides itself on the level of financial aid and tuition support that it provides to students. During the 2015-16 season, the organization awarded over \$120,000 in financial aid to more than one-third of the SFGC's enrolled students. Of the 109 students who received aid, the SFGC provided 60% of students with at least half tuition discount, and 14% received full tuition coverage.

## Revenue and Expenses FY 2015-16

Revenue	%	\$
<b>Earned Income</b>	42%	\$1,008,000
<b>Contributed Income</b>	28%	\$672,000
<b>Kanbar Center Rentals</b>	23%	\$552,000
<b>Performances and Bookings</b>	7%	\$168,000
Expenses	%	\$
<b>Program</b>	75%	\$1,800,000
<b>Administration and Facilities</b>	25%	\$600,000

## A Call for Increased Foundation Support

With an annual budget that requires nearly 30% contributed income, the SFGC development team engages numerous funding sources to reach their annual goal of almost \$700,000. Institutional donors, which include foundations, corporations, and government agencies, account for about half of that contributed income. In 2015-16, a portfolio of fourteen foundations, eight corporations, and five government agencies provided financial support in excess of \$350,000 to the SFGC. Foundations that support the SFGC include both local family foundations and large, national organizations. **Appendix 1** lists the institutional donors that supported the SFGC during the 2015-16 season.

Executive director Beth Schechter recently replaced Melanie Smith, who served the SFGC in that role from 2006 to 2016. As part of Schechter's agenda, she has charged SFGC Director of Development Samantha Rowell with strengthening the organization's foundation support. There are multiple reasons that Schechter has made this a priority for the organization. Several foundations supporting the SFGC have provided consistent annual funding over the years. The Hewlett Foundation for example, has supported the SFGC since the late 1980s and both the Bernard Osher Foundation and the San Francisco Grants for the Arts have provided annual support since the organization's founding in 1978. There is an

adage, however, that a foundation can disappear as quickly as it arrives, which has proved true for other foundations in the SFGC portfolio. For instance, some operate on a three-year funding cycle, which requires one off-year for every three-years of funding provided. Rowell and Schecter are anticipating a deficit of over \$45,000 in the operating budget for the upcoming fiscal year due to a required off-year by the Crescent Porter Hale Foundation. By calling for increased focus on the SFGC's annual foundation support, Schecter hopes to mitigate the anticipated shortfall from required off-years.

While the SFGC is also working to increase its individual donor base, one of the benefits of increasing foundation support is that it allows the organization to reach beyond its direct sphere of influence within the San Francisco Bay area. Individual, annual-fund donors often have an existing connection to the SFGC; they are mostly parents, alumni, and friends of the organization who care deeply about the mission, vision, and values of the chorus. The number of individual donors is related to the size of the organization. Without drastically increasing the number of students that the organization serves, which requires additional funding and a programmatic initiative, it is difficult for the SFGC to achieve a substantial increase in its individual donor base and annual fund goal. Rowell's objective with the annual fund and individual donors is to maintain a stable and consistent donor pool, develop and nurture relationships, and achieve an incremental increase in support each year. In contrast, with foundation donors, the SFGC is able to extend its network of donors. Different than the stream of small individual donations, support from foundations rests primarily on the funding priorities of grantmaking organizations and the ability of the SFGC to "tell its story" in a broad and compelling way. By seeking funding from large, national foundations with significant assets, the SFGC positions itself to allow transformative investment in the organization. For example, during the last two fiscal years, Bloomberg

Philanthropies, a corporate foundation based in New York City, provided \$200,000 to support the SFGC's audience development and marketing efforts. Rowell admits that the SFGC often budgets conservatively for anticipated foundation support, as a way to guard against foundations' shifting funding priorities and unanticipated proposal rejections. Conservative budgeting also forces the development team to redouble its efforts to build strong support for the organization. Rowell stresses the importance of "re-earning donor support every single year," not just expecting repeat donations. However, a number of foundations continue to place the arts and education as top priorities, giving hope to organizations like the SFGC.

## Researching Foundations

With the charge to increase annual funding from foundations, Samantha Rowell's first task is to identify potential grant-making agencies through research. Just as it is important for a foundation to ensure that a grant-seeking organization's mission matches its funding priorities, it is equally critical that the grantseeking organization confirm that a foundation's mission and initiatives align with its objectives. While foundations typically use a grant application to determine if an organization should receive funding, the foundation research process for the grantseeking organization must start well in advance of the proposal process.

**"A clear and comprehensive foundation research process is key to achieving success with grant proposals. It is imperative that you have an intimate understanding of the organizations from which you are seeking funding."**

*– Samantha Rowell,  
SFGC Director of  
Development*

To identify leads on potential foundations, Rowell will visit websites and read the annual reports of

arts organizations similar to the SFGC, in order to discover which foundations are supporting them. This approach allows Rowell to further research foundations with the understanding that they have a history of supporting performing arts education programs for youth. Rowell has also found it fruitful to reach out to current constituents of the SFGC (families, friends, alumni, and current donors) to identify corporate or family foundations that may have an indirect connection to the SFGC. Other resources, including online databases hosted by The Foundation Center and Guidestar, provide important overviews of grantmaking agencies, furnishing the public with contact information, priorities, assets, and often copies of 990 forms (the returns of organizations exempt from income tax).

Once a potential foundation is identified, Rowell will use the SFGC foundation research document (**Appendix 2**) to vet the foundation and determine if its priorities resonate with those of the organization. Factors such as the mission and vision of the grantmaking agency, geographic concentrations, published funding priorities, and initiatives are considered. Rowell will also review the organization's Form 990 to understand how the grantmaking organization's assets and annual giving are organized. A grantmaking organization's website will often include profiles of grant recipients and the types of projects they fund. This information allows Rowell to build a clear and complete profile of the funding priorities and tendencies of the grantmaking organization. By understanding the landscape of foundations, their organizational structures, and their personnel, Rowell identifies the potential paths to funding. While the SFCG never allows funding priorities of grantmaking agencies to dictate its educational and artistic programming, the funding research process enables the development team to call attention to projects in the artistic pipeline that could capture major grants.

## Understanding the Different Types of Foundations

Rowell has dealt with a range of foundation types and has secured funding from the main categories of funders for the SFGC portfolio. Family foundations are one type of foundation with which SFGC has had particular success. The Bernard Osher Foundation, a consistent supporter of the SFGC, is a particularly streamlined example of a family foundation. In this foundation type, funds are supplied by a single family, and members of that family serve on the board of the foundation. Family members can also play an active role in the administration of the foundation. Large family foundations may sometimes evolve into independent foundations, where a board of community members will manage and administer the foundation's assets. The Rockefeller Foundation and the Ford Foundation, no longer managed by members of the respective families, provide excellent examples of large, private, independent foundations. If a family wishes to improve a particular community through philanthropic support, it might move its assets into a community foundation. These geographically-based foundations, such as the San Francisco Foundation, are composed of funds established by many different donors who wish to benefit the residents or community in a defined geographic area, without the administrative responsibilities of starting their own family foundation.

Corporate foundations, sometimes referred to as company-sponsored foundations, such as the aforementioned Bloomberg Philanthropies, obtain funding from for-profit businesses to conduct charitable work. While these funds come directly from the corporation's earnings, corporate foundations are often separately-governed entities with their own objectives. While many foundations enact their charitable work by way of grantmaking to other organizations, some operating foundations, such as the Getty Trust, make limited, if any, grants, instead opting to run many of their own charitable

programs and initiatives. Rowell's first order of business in researching foundations involves having a clear understanding of the type of foundations she is considering for the SFGC, as well as a knowledge of how the foundation is structured and who the key officers are within the organization.

### **Telling the Story to Prospective Funders**

One of the obstacles that Rowell and her team face when applying for foundation support is effectively communicating all of the facets of the SFGC operation.

While the SFGC's dual profile as both a professional

**"You often have to be a chameleon when applying for foundation support. You need to be able to articulate which aspects of a project best fit the funding priorities of a foundation. The same project may sound completely different on two different grant proposals."**

*– Samantha Rowell,  
SFGC Director of  
Development*

performing arts ensemble and a youth education institution has the potential to attract a more diverse portfolio of funders, the bifurcation of the organization's operations sometimes clouds funding eligibility and alignment with foundation initiatives. The choir performs regularly with the San Francisco Symphony, for example, yet is also an education program composed of children as young as five years old. This duality can be further complicated by the female-only makeup of SFGC members, which is viewed as exclusionary by some foundations.

The ability to articulate an organization's mission from many different angles—through a variety of distinct but complementary narratives—is essential to gaining foundation support. Foundations often have very specific interests and priorities, so it is important for Rowell and the team to make the SFGC narrative compelling and well tailored in its proposals. As Rowell points out, "To achieve success

with foundation funding, you have to be able to tell the same story in many different ways."

Both Rowell and Schechter agree that the SFGC will never mischaracterize its mission or bend its programming to secure funding. They must instead be attuned to the funding priorities of foundations and think creatively about potential connections to the SFGC. Rowell's craft of 'positioning' the SFGC for funders allows her to pursue a diverse body of foundations for the portfolio. Some foundations will have funding priorities that might not seem to align with SFGC programs on the surface, but will appeal to Rowell for a particular reason. While the mission, vision, values, and programming of the SFGC never changes, how Rowell highlights these elements (and what is downplayed) in a grant proposal will vary greatly from foundation to foundation.

The SFGC will often pursue foundation funding to support the commissioning of new artistic works, one of the consistent areas of income for the organization. The duality of the SFGC mission as both a youth education program and professional performing arts ensemble again may complicate a grant proposal. Many foundations that traditionally support artistic commissions do so with a focus on professional performers and ensembles; artistic creations specifically for a "children's choir" are rarely funded. In these instances, Rowell will advertise the SFGC not as a girls choir, but rather as a kind of musical instrument. She places focus on portraying the chorus as a lyrical, broad instrument of professional musical quality, not a training program. This kind of positioning of the SFGC brand has proved especially successful with the Walter and Flora Hewlett Foundation, which has provided grants to the SFGC for commissioning such works as Jake Heggie's "Patterns" (2000), Kurt Erickson's "O Magnum Mysterium" (2001), and Albert Grau's "Caracolitos Chicos" (2002). While de-emphasizing the individual students who make up the girls chorus may overlook a core value of the organization, the

funding reaped by a savvy grant writer allows the SFGC to deliver on its mission to its fullest potential.

The SFGC has similarly achieved success in securing funding from grantmakers who prioritize social justice and equality. The positioning of the organization must again be shifted. Funding in the social justice category, which enhances the educational experience of SFGC members, also supports the artistic endeavors of the organization. During the 2013-14 season, in celebration of its 35th anniversary, the SFGC embarked on an ambitious project to perform Benjamin Britten's monumental one-act opera, *Noye's Fludde*. As part of the performance, the organization partnered with Creativity Explored, an organization whose mission is to advance the value of diversity and artistic expression, and to provide artists with developmental disabilities the means to create, exhibit, and sell their art. The SFGC development team saw the powerful social and community impact that the collaboration would have and concluded that the traditional portfolio of foundations that support artistic creation would have achieved limited success given the nature of the collaboration. Through the foundation research process, SFGC identified the Walter & Elise Haas Fund as a strong potential funding source for the project. The mission of the Walter & Elise Haas Fund is to help build a healthy, just, and vibrant society in which people feel connected to—and responsible for—their community. The foundation prioritizes individuals taking responsibility for society as a whole, the value of active community involvement and leadership, and the critical role of a healthy and stable nonprofit infrastructure. Further, the foundation articulates a commitment to equity, providing opportunities for community members whose options are limited and whose voices are often unheard.

Accordingly, the SFGC grant proposal focused neither on artistic excellence nor on the details of re-staging the Britten opera, but rather on the social and community impact of partnering with the artists

of Creativity Explored. The Walter & Elise Haas Fund awarded \$20,000 for the project, which enabled the SFGC to commission the artists of Creativity Explored to create 50 elaborate cut-out animal props, which were incorporated into the staging of the opera. Rowell and her team learned that sometimes foundations can inspire arts organizations to become more relevant and compelling contributors to the community. With *Noye's Fludde* for example, the SFGC could have pursued individual donations to underwrite the costs of the professional staging of the work. Instead, the funding from the Walter & Elise Haas Fund facilitated a collaboration and allowed a relationship to develop between two important arts organizations in the San Francisco Bay area, one that serves youth and one that empowers artists with disabilities.

### **The Foundation as Individual Donor**

Many of the same principles that guide the SFGC's development and nurturing of relationships with individual donors are applied to foundations. In her charge to the development team to increase foundation support, Beth Schecter also stressed the importance of strengthening relationships with the existing portfolio of foundations that support the SFGC. Rowell counsels: "It is often easy to forget that actual people work at foundations." While the first step in foundation research might be to create a profile of available information with the goal of understanding the foundation's structure and assets, equal time and effort should be allocated to getting to know the organization, particularly its grant officers, personally. Rowell makes a point to treat officers of a foundation as if they were individual donors, as a way to cultivate the relationship.

After establishing personal relationships with key members of grantmaking agencies, Rowell also makes a point to find meaningful ways to thank foundations once they have provided support to the SFGC. As mentioned, the Bernard Osher Foundation

has provided financial support to the SFGC every year since the choir was founded in 1978, a rare example of a loyal supporter of the chorus over time. Rowell attributes the longevity of Osher's support to the special relationship that SFGC has sought with the foundation. In 2015, Rowell received notification that Barbro and Bernard Osher were being honored with a Lifetime Achievement Award for their philanthropy at a dinner hosted by the Association of Fundraising Professionals (AFP). Rowell saw the awards dinner as the perfect opportunity for the SFGC to thank the Osher family publicly for its substantial and longstanding support. With over 35 years of support from the Oshers, the SFGC was a testament to the family's lifetime commitment to philanthropy.

Rowell contacted the AFP and was able to arrange quickly a special performance of the SFGC during the awards dinner. The performance at the dinner required substantial resources (human, time, financial, etc.), but in the end, it was a small price to pay for what the Osher Foundation had given to the organization since its inception. In addition to the opportunity to thank the Osher family, the performance at the AFP dinner also placed the SFGC in front of a large group of potential donors in such a way that demonstrated the values and integrity of the organization. While foundations may shift funding priorities away from the arts, the SFGC development team has continued to nurture the relationships with institutional donors as a means of blunting the potential impact of fluctuations year to year.

### **Securing and Stewarding Foundation Support**

Even before the mandate to increase foundation support, the SFGC spent considerable time and resources to both acquire and maintain foundation funding. Rowell recalled an unfortunate paradox that exists in foundation funding: “the arts organizations that are most in need of foundation support, often don't have the have the resources—human or time—

available to both apply for and manage foundation funding.” With a development staff of only two people, the SFGC knows this paradox all too well. Grantmaking organizations further put pressure on grantseeking organizations by demanding rigorous application and funding management procedures. These foundations have responsibilities to their boards, donors, and the government, to track how a foundation's assets are used, which often results in labor-intensive processes for grant application and grant management.

Grant stewardship usually involves providing detailed evidence showing that funds are being used effectively and in line with the foundation's priorities. Rowell warns that few foundations ever fund “art for art's sake,” and that there is usually an expectation for quantitative data to demonstrate grant progress. It is often difficult to quantify the intrinsic benefits of arts education, forcing the SFGC to supply data associated with the social, developmental, and other non-musical benefits of arts education and music performance in order to justify grant funding. **Appendix 3** includes the grant outcome tracking required by the Main Street Foundation. The tracking of the four “intermediate outcomes” is for a single year, as part of a multi-year grant. The document indicates the kind of metrics an organization may use to report results.

Occasionally, grantmaking agencies will request quantitative data from organizations that is very difficult to obtain or unconventional for the type of program provided. For example, when the SFGC pursued foundation funding to support their Creating Choral Music in-school outreach program for underserved youth, one foundation requested detailed test score data from students both before and after the program had been delivered. The type of individualized, highly specific data that the foundation requested was beyond what the SFGC could access in its role as an outside organization providing enrichment programs in the public schools.

Ultimately, the SFGC administration decided that the foundation's requirement of pre- and post-program STEM test scores to justify music instruction did not align with its core values, and the funding opportunity was not pursued. While foundations provide a much-needed source of revenue for arts organizations, great institutional energy is devoted to not only to the securing of funds but also to the stewardship of funds once they are awarded.

### You're Hired!

SFGC Executive Director Beth Schecter understands that in order to increase foundation support, additional human resources will be needed to support the initiative. To that end, she has hired you as the new Director of Institutional Donors. In your first month in the office, you have been tasked with three assignments:

- Analyze the SFGC foundation research process with reference to **Appendix 2**, the organization's current Foundation Research Document. What is missing from the process and how can the document be improved? What other factors might be considered when seeking alignment between the SFGC's mission and values, and a grantmaking organization's funding priorities?
- Rowell and Schecter have yet to identify a solution for the anticipated \$45,000 gap in operating funds, due to a required off-year mandated by a foundation that regularly supports the SFGC. What strategies can be put in place to deal with foreseeable shortages from foundation off-years in the future? Using the foundation research document (**Appendix 2**), can you identify a new foundation prospect, which did not support the SFGC during the 2015-16 fiscal year (**Appendix 1**), but would be a good match for the SFGC? Prepare your rationale for Schecter and Rowell with reference to **Appendix 2**, explaining how the new foundation's priorities and past funding align with the SFGC.
- The Main Street Foundation, which has provided \$20,000 in general operating support to the SFGC for a decade has approached the organization about performing at a summer music festival that they sponsor. The foundation has requested repertoire that is outside of the SFGC core curriculum and would require approximately three months of rehearsals to prepare. The preparation would infringe on other programs already scheduled and in preparation. In acknowledgement of the performance, the foundation has offered to increase their support of the SFGC to \$100,000 for the next fiscal year. This substantial increase would mean that the Main Street Foundation would account for nearly 5% of the total operating budget of the SFGC. The foundation has also signaled that, by accepting this opportunity, it may increase support to the SFGC in future years. Members of the board have expressed their support of the initiative, but SFGC Artistic Director Lisa Bielawa has expressed concern about the amount of rehearsal time that will be required in order to prepare the choir for the festival. Weighing the benefits and drawbacks of this opportunity, what do you recommend to Executive Director Schecter?

## APPENDIX 1

### San Francisco Girls Chorus Institutional Donors FY 2015-16

#### Corporations and Other Organizations:

Airbnb  
Bloomberg Philanthropies  
Center for Learning in Retirement  
ChevronTexaco Corporation  
Elite Auctions and Fundraising Services  
Severson and Werson  
Susan's  
The Table Church of San Francisco



#### Foundations:

K. Arakelian Foundation  
The Aaron Copland Fund for Music, Inc.  
Ann and Gordon Getty Foundation  
The William G. Gilmore Foundation  
The John and Marcia Goldman Foundation  
The Crescent Porter Hale Foundation  
The William and Flora Hewlett Foundation  
The Kimball Foundation  
The Bernard Osher Foundation  
The Henry W. and Nettie Robinson Foundation for the Arts  
Sequoia Trust  
Wells Fargo Foundation  
Young Singers Foundation

THE WILLIAM AND FLORA  
HEWLETT  
FOUNDATION

THE BERNARD  
OSHER  
FOUNDATION

#### Government:

California Arts Council  
Consulate General of the Federal Republic of Germany  
Grants for the Arts/San Francisco Hotel Tax Fund  
National Endowment for the Arts  
Voluntary Arts Contribution Fund



## APPENDIX 2

### SFGC Foundation Research Document

**Foundation Name:** \_\_\_\_\_

**Foundation contact information:** \_\_\_\_\_

\_\_\_\_\_

**Foundation website:** \_\_\_\_\_

**Foundation board/officers:** (include contact info if available) \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**How did we hear about the foundation?** \_\_\_\_\_

\_\_\_\_\_

**Type of foundation:** \_\_\_\_\_

**Geographic region served:** \_\_\_\_\_

**Foundation mission, vision and values:** \_\_\_\_\_

\_\_\_\_\_

**Funding priorities:** \_\_\_\_\_

\_\_\_\_\_

**Total assets:** (Attach Form 990 for last 3 years) \_\_\_\_\_

\_\_\_\_\_

**Total value of grants made in the last fiscal year:** \_\_\_\_\_

**Total number of grants made in the last fiscal year:** \_\_\_\_\_

## APPENDIX 2

### SFGC Foundation Research Document (Cont.)

Average grant amount: \_\_\_\_\_

SFGC programs/initiatives that align with the funding priorities of the foundation: \_\_\_\_\_

\_\_\_\_\_

## APPENDIX 3

### Sample Grant Outcome Tracking

Intermediate Outcome #1	Indicators	Activities	Baseline	Progress FY2016	Projected Targets
SFGC will break new ground in choral programming and repertoire, further challenging the perception of what is possible for a youth arts organization.	Increased % of audience members identify as classical/ concert music/ other performing arts enthusiasts	Engage choreographer in residence, beginning 2013-2014, to enhance concert presentations	No choreographer in residence	Stage Director Charles Otte in residence for most 2015-2016 performances	Engage choreographer in residence annually
	Increased coverage from local and national media about new works and collaborations	Continue to engage composer in residence to add new work to the choral repertoire each season	Composer in residence for 2012-2013 season	Theo Bleckmann resident composer for premiere ensemble and Chorus School for 2015-2016	Engage new composers in residence for 2013-2014, 2014-2015 and 2015-2016 seasons
	Increase in national/ international performance invitations and engagements	Continue to engage in strategic artistic collaborations to help expand audiences locally and beyond	26% of 2011-2012 audience identified as classical music patrons	<p>For 11/1/15 concert, 62% of audience identified as classical music patrons; 22% identified as classical music patrons for 6/9/15 concert</p> <p>SFGC traveled to 3 Nordic countries in June 2015 and performed with prominent local you and women's choruses there. These choruses will reciprocate with visits and performances in SF in the spring/summer of 2016.</p> <p>In July 2015 SFGC also traveled to Ashland, Oregon, performing in 3 concerts as part of the Britt and Oregon Shakespeare Festivals.</p> <p>SFGC has been invited to perform in the New York Philharmonic Biennial in June 2016.</p>	40% of 2014-2015 audience identifies as classical/ performing arts patrons

## APPENDIX 3

### Sample Grant Outcome Tracking (Cont.)

Intermediate Outcome #2	Indicators	Activities	Baseline	Progress FY2016	Projected Targets
SFGC will exemplify strong infrastructure and support systems of dynamic management, governance, and sustainable capital stewardship.	Interest in SFGC leadership model from other youth/performing arts organizations	Appoint new artistic leader(s) and inaugurate collaborative leadership model with senior artistic and administrative staff	Interim Music Director in place	Artistic Director and Music Director share second jointly curated season in 2015-2016	2013-2014 new artistic leadership and collaborative leadership model in place
	Recruitment of new board members to fulfill specific responsibilities	Within a framework of shared goals and vision, develop specific job descriptions, with individualized purposes and tasks, for each board member	No specific job descriptions for individual board members	One new board member brought on for 2015-2016 with specific expertise in non-profit arts management  New five-year Strategic Plan adopted in 2014-2015	Each board member understands and implements specific role and responsibilities by 2014-2015
	Increased participation and earned income from Kanbar Center rentals	Create programs and marketing for SFGC's home facility, the Kanbar Center for the Performing Arts, to build community and increase rental income	24 arts organizations renting/using Kanbar facilities	7 new arts organizations renting/using Kanbar facilities in 2015-2016  Unaudited FY2015 projection shows year-end surplus  Strategic fundraising/governance consultants recommend starting new capital campaign in 2017-2018, to allow time to build on new protocols and practices.	5 new arts organizations renting/using Kanbar facilities by 2015-2016    Balanced budgets for each year of grant period, beginning with FY2013  First phase of planning and major fundraising campaign for large scale capital and program initiatives begun by FY2015, with the goal of completing the campaign during SFGC's 40th anniversary season, 2018-2019

## APPENDIX 3

### Sample Grant Outcome Tracking (Cont.)

Intermediate Outcome #3	Indicators	Activities	Baseline	Progress FY2016	Projected Targets
SFGC will increase and diversify enrollment in its core programs.	Additional in-school choral music program in underserved neighborhood	Expand Creating Choral Music program into more underserved public schools	Creating Choral Music in two public schools	Creating Choral Music begins in third and possible fourth school in January 2016	Add third Creating Choral Music program in underserved school by 2014-2015
	Increased enrollment/income from Level I of Chorus School	Add a second section of Level I of Chorus School training program to expand enrollment and increase earned income from tuition	One section of Level I of Chorus School	Second section of Level I opened in 2015-2016	Add second section of Level I of Chorus School during 2013-2014
	Increased interest and enrollment in Preparatory Chorus	Additional section of Preparatory Chorus at school site in underserved neighborhood	No Preparatory Chorus program at underserved school	Summer Prep Chorus launches in July 2015	Establish Prep Chorus program at one underserved school by 2014-2015

Intermediate Outcome #4	Indicators	Activities	Baseline	Progress FY2016	Projected Targets
SFGC will create more opportunities for choristers to expand their music and performing arts education at the pre-professional and professional levels	requests and new earned income stream from published curriculum guides	Codify, document, publish and sell curriculum and repertoire of Chorus School training program	No documented or published Chorus School curriculum	Revised, documented Chorus School curriculum completed spring 2015	Chorus School curriculum published and offered for sale by 2014-2015
	More choristers graduating from SFGC pursue professional level music/arts education and careers	Develop partnerships and residencies with professional artists/ensembles	No partnerships or residencies with professional artists/ensembles	Partnership with TENET during 2015-2016 season	Establish and maintain one annual/ongoing residency with professional artist/ensemble beginning in 2013-2014



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