



The State of
American Philanthropy

Giving for
Music

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ABOUT INSIDE PHILANTHROPY

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ABOUT THE STATE OF AMERICAN PHILANTHROPY

The State of American Philanthropy is a series of background papers on important topics and trends in U.S. philanthropy. The papers draw on past research and reporting by IP writers, as well as new interviews, grantmaking data, and other sources. Learn more at insidephilanthropy.com/state-of-american-philanthropy.

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EXECUTIVE SUMMARY

This brief explores the giving of private foundations, corporations, community foundations, and major donors to nonprofit organizations that produce musical performances, educate musicians, or provide direct financial support to musicians.

Opera companies and orchestras receive a significant portion of the sector's charitable contributions. Opera companies received roughly half of their revenues from "private support." The figure for orchestras is slightly lower, at 43%. Individual donors play an outsized role across this sector, while support from institutional and donor-advised funds exceeds that of dance and theater.

The entire performing arts field has been deeply impacted by the COVID-19 pandemic and growing calls for social justice. A May 2020 Americans for the Arts survey of 11,500 performing arts professionals found that 95% of respondents' organizations canceled events due to COVID-19. In response, funders loosened restrictions and provided emergency support to shuttered music organizations.

Beyond the events of the COVID-19 era, which were extraordinarily difficult for the music community, there are long-term factors and trends every funder and fundraiser in the arts should keep in mind, and which are explored in-depth in this brief:

Who's Giving

- Private and family foundations play an especially influential role in the world of music. These entities focus on priorities like capital projects, programs and performances, generally providing relatively less direct support for individual artists.
- Corporate funders play a relatively small role in overall support for nonprofit music. This support often comes in the form of sponsorships, as opposed to philanthropic giving.
- Individual major donors tend to give most to capital projects, endowments, programming and university music education activities. Individual and trustee support for symphony, opera, and other music organizations exceed that of any other performing arts field.
- The music sector enjoys a robust network of entities providing funders and fundraisers with networking, advocacy and data gathering. Regrantors play a prominent role.

Who's Getting

- The bulk of private giving flows to opera companies and orchestras with deep and longstanding relationships with foundations and major donors.
- These organizations were well-positioned to withstand the pandemic due to their endowments and access to funding. Small and mid-sized organizations continued to face greater threats to long-term sustainability as the crisis dragged on.

- Many well-resourced opera companies and orchestras modified artist labor agreements to offset pandemic-related losses. As the crisis recedes, many of these cuts may become permanent while the field's reliance on philanthropy grows.

The Big Issues & Funding Trends

- Prior to the pandemic, music funders focused on raising the profile of organizations in small to mid-sized American cities, supporting capital campaigns, and boosting efforts to reach new audiences. Now, funders are prioritizing efforts to survive the pandemic while boosting racial equity across the field.
- Over the longer term, audience engagement remains a top existential concern for many music organizations, particularly those in the opera and classical music field.
- Trust-based philanthropy practices, such as embracing general operating support and streamlining reporting requirements, were already big trends, but significantly expanded in the pandemic era.
- Support for optimizing and monetizing virtual presentation of music performances has also taken on a larger priority for funders and the organizations they support.

Equity in the Sector

- Confronted with a growing body of research underscoring persistent inequities across the field, leaders in the music funder community have been pursuing a wide variety of strategies to boost the ranks of Black, female, disabled, LGBTQ+, and indigenous performers, composers and leaders.
- Growing from earlier sector-wide conversations about representation, music funders are expanding notions of what constitutes a music organization, revisiting grant application processes, actively soliciting proposals and conversations with BIPOC-led organizations, and providing awards to cultivate underrepresented musicians, among many other initiatives outlined in this brief.

Fundraising Now

- Many music groups IP spoke with fared better than expected during the difficult COVID era and are beginning to look ahead to a brighter future, thanks to the generosity of loyal donors and institutional funders that stepped up.
- COVID-related aid from the Paycheck Protection Program and other government funds were also lifelines for numerous music organizations, although such public aid has often been hard to tap.
- In a twist on traditional fundraising trends, in which larger, more sophisticated organizations usually have an edge, some of the country's biggest music-focused nonprofits – which have huge fixed costs and union contracts – seem to be struggling more than their smaller counterparts.

In fall of 2021, music organizations and performers were tenuously planning for a limited re-opening that necessitated investments in precautionary measures to reduce the risk of COVID-19 transmission.

Acknowledging that patrons may be reluctant to attend in-person events, funders are exploring ways to help all music organizations expand their audience base in a post-pandemic world.

Music grantmakers can also remain relevant in a post-COVID world by strengthening partnerships with local community organizations and embracing intersectionality, an integrated approach with programming that acknowledges overlapping identities and may address social issues like poverty, PTSD and hunger. These efforts can help organizations appeal to millennials and Generation Xers for whom issues like social justice are top concerns.

Introduction

This paper defines nonprofit music organizations in accordance with the IRS National Taxonomy of Expert Entities' Arts, Culture & Humanities Activity Code. Applicable subcodes for the music sector include, but are not limited to, Symphony Orchestras, Opera, Singing & Choral Groups, Folk Arts, and Music, defined as “organizations whose primary activity is the production of musical events, including concert series and music festivals.”

This brief also considers gifts to nonprofit educational institutions that receive philanthropic support for music-related activities and individual professionals like composers or musicians.

The National Endowment for the Arts (NEA) found that in 2017, 43.4% of U.S. adults, or 106.8 million people, attended at least one of 10 defined performing arts activities. The highest percentage of respondents attended an “outdoor performing arts festival” (24.2%), followed by “musical plays” (16.5%). “Classical music” and “jazz music” were tied for the fifth-most popular activity (8%), followed by “Latin, Spanish, or salsa music” (5.9%). Only 2.2% of respondents attended an “opera” event, making it the least popular activity on the NEA’s list. (The NEA did make a distinction between for- and nonprofit performances.)

This brief defines an “orchestra” as any ensemble featuring strings; “chamber orchestras” employ 50 or fewer musicians playing stringed instruments, while a “symphony orchestra” can have over 100 musicians playing a variety of instruments.

According to the League of American Orchestras’ (LAO) most recent Orchestra Facts: 2006–2014

report, 1,224 orchestras produced 28,000 performances, activities, and other events in 2014, attracting a total audience of nearly 25 million. OPERA America’s 2020 Annual Field Report found that 114 U.S. cities have professional opera companies. These companies employ 18,800 artists and invest \$1.02 million in the economy.

Funders support nonprofit music fields like opera and classical music to preserve, enhance and promote the forms for future generations. These donors operate under the belief that, if these forms were left adrift in the commercial marketplace, many of these organizations – and their art forms – would not survive.

These musical productions are expensive. They require large numbers of musicians, most of whom are salaried, and have a fixed set of costs including expensive-to-maintain, specialized performance venues and extensive management and promotions staff. All this makes it difficult for organizations in the classical field to squeeze out productivity increases. According to Opera America’s 2020 field report, personnel comprises the top operational expense, at 71%. These labor costs, which include pensions and healthcare, have been the focus of many recent strikes by orchestra musicians in cities like Philadelphia, San Francisco and New York since the Great Recession.

On the earned revenue side, organizations continue to grapple with decreasing demand, an aging demographic, and dwindling subscription rates. Earned income accounts for only 40% and 32% at League of America Orchestras and Opera America’s member companies, respectively. Symphony orchestras “all run an operating deficit, in the sense that the money they earn from concerts, records and so forth does not cover their expenses,” said

Robert Flanagan, a professor of economics at Stanford University.

As such, operas and symphony orchestras receive the lion's share of the sector's philanthropic support. However, a growing chorus of equity advocates in the funding space argues that these organizations have traditionally calibrated programming toward a Eurocentric view of arts and culture, often to the detriment of diverse cultures. Looking ahead, both funders and high-brow organizations are investing in initiatives to boost inclusion to reach new and more diverse demographics.

Private funding also provides critical support to organizations operating in fields like jazz, choral music, and folk music.

The Lay of the Land

Who's Giving

The philanthropy ecosystem of the nonprofit music sector consists of private and family foundations, donor-advised fund providers, individual donors, corporations and government agencies. According to Candid, the 15 largest foundations and DAF sponsors from 2014–2018 are as follows:

Top 15 Music Funders 2014 - 2018

Grantmaker	Dollar Value of Grants Awarded
Fidelity Charitable Gift Fund	\$104M
Andrew W. Mellon Foundation	\$67M
Schwab Charitable	\$50M
Greater Kansas Community Foundation	\$46M
Jewish Community Foundation of San Diego	\$37M
Crawford Taylor Foundation	\$35M
Lilly Endowment, Inc.	\$35M
Avenir Foundation	\$33M
Combined Jewish Philanthropies of Greater Boston	\$31M
William Penn Foundation	\$27M
Vanguard Charitable Endowment Program	\$26M
Minneapolis Foundation	\$26M
William K. Bowes, Jr. Foundation	\$26M
Bill and Ann Ziff Foundation	\$25M
Metropolitan Opera Guild	\$25M

Source: Candid

The music field's top 15 institutional grantmakers gave \$592 million to music organizations from 2014–2018, significantly more than theater (\$479 million) and dance (\$297 million).

The Candid list encapsulates the breadth of the music funding ecosystem. Institutional grantmakers like the Andrew W. Mellon Foundation and more regionally focused funders like the Crawford Taylor Foundation (St. Louis) and the William Penn Foundation (Philadelphia) provided approximately 45% of total support from 2014–2018.

The list's three financial services firms—Fidelity Charitable Gift Fund, Schwab Charitable, and Vanguard Charitable Endowment Program—support music organizations nationwide through donor-advised funds (DAFs) and comprise 30% of total giving.

Candid's list includes four community foundations. DAFs often constitute a large percentage of arts-related community foundation giving. For example, the nation's largest community foundation, the Silicon Valley Community Foundation, awarded over \$133 million in "Arts and Culture" grants in 2018. The foundation's [grants database](#) reveals that 99% of that funding flowed from donor-advised funds.

By funding music organizations recommended by donors, DAFs essentially act as proxies for individuals. Therefore, it would be more accurate to frame funding allocated from DAF providers Fidelity and Schwab and community foundation DAFs as expressions of individual donor support for music organizations.

Some funders focus on specific music fields. The Doris Duke Charitable Foundation is one of the few institutional grantmakers supporting jazz. “The field as a whole has less infrastructure,” Maurine Knighton, program director for the arts, told IP. “It is more of a hybrid field where artists flow freely between commercial and not-for-profit work and activities.”

Another prominent funder, Chamber Music America, supports organizations that perform chamber music, defined as “music for small ensembles between two to 10 musicians, one musician per part, generally without a conductor,” said CEO Margaret Lioi, who stepped down from the role in July 2021. “There is no mention of style of music, and we consider classical, contemporary, jazz and music of other cultures to be chamber music as long as they fit the definition.”

The Candid data does not include the largest source of private funding for music organizations—non-DAF individual donors and the vast majority of family foundations that don’t report to Candid.

“People think of foundations like Mellon and Wallace making up a bulk of organizations’ revenue base, but that’s not borne out in the data,” said the Wallace Foundation’s director of communications, Lucas Bernays Held.

Indeed, SMU DataArts’ 2019 Fundraising Report found that symphony orchestras, operas and music organizations relied much more on “unrestricted contributed revenue” from individuals and trustees to cover expenses in 2017 compared to other performing arts fields.

Of the 11 performing arts categories profiled in the study, the three fields with the highest percentage of individual support were symphony orchestras (18%), music (16%) and opera (13%). In contrast, the average rate of individual support was 9.6%. At 12%, opera had the highest percentage of trustee support, versus the average rate of 4.8%.

Similarly, LAO’s “Orchestra Facts: 2006–2014” stated that “individual (trustee and non-trustee) donors were found to be the cornerstone of

Percentage of expenses covered by unrestricted contributed revenue (before depreciation)			
Unrestricted Contributed Revenue Source	Symphony Orchestras	Operas	Music
Individuals	18%	13%	16%
Trustees	5%	12%	6%
Foundations	4%	6%	8%
Corporations	3%	2%	3%
Government	3%	2%	5%
Other	17%	27%	28%
Total	50%	62%	66%

orchestras’ contributed income, giving almost half of the field’s contributed funds in 2014.”

Gifts from individuals can dramatically eclipse foundation support. For instance, in 2019, an unnamed couple gave the Philadelphia Orchestra a \$55 million gift through a donor-advised fund at the Silicon Valley Community Foundation. The one-time gift exceeds the total music-related grantmaking from 2014–2018 of all but one of the private foundations on Candid’s list, the Andrew W. Mellon Foundation.

The preceding table also confirms Director of SMU DataArts Zannie Voss’ assertion that corporate giving has “never been a great panacea” for performing arts organizations. The same can be said for government support. According to a [2017 Grantmakers in the Arts](#) report, total public arts funding, when adjusted for inflation, decreased by 12.8% over the past two decades. In real dollars, state arts agency appropriations decreased by 25%, local funding contracted by 9% and federal funds have remained virtually flat.

National grantmakers not included on Candid’s list include Aaron Copland Fund for Music, Amphion Foundation, Barr Foundation, Boston Foundation, Bloomberg Philanthropies, Wallace Alexander Gerbode Foundation, Alice M. Ditson Fund, Doris Duke Charitable Trust, Nathan Cummings Foundation, Ford Foundation, William Randolph Hearst Foundation, William and Flora Hewlett Foundation, Howard Gilman Foundation, Ann and Gordon Getty Foundation, Jerome Foundation, Knight Foundation, Kresge Foundation, MacArthur Foundation, Mid-Atlantic Arts Foundation, New England Foundation for the Arts, Rockefeller Foundation, Shubert Foundation,

Surdna Foundation, Virginia B. Toulmin Foundation, Wallace Foundation, Walton Family Foundation and the Windgate Foundation.

The music funding ecosystem also includes arts service organizations and regrantors like Alternate ROOTS, American Composers Forum, Chamber Music America, Chorus America, Early Music America, Folk Alliance International, League of American Orchestras MAP Fund, New Music USA, Opera America, South Arts, Sphinx Organization and the National Alliance for Musical Theatre.

Who’s Getting

Candid’s list of the top 10 music recipients of institutional charitable giving from 2014–2018 are as follows:

Recipient	Dollar Value of Grants Received
Metropolitan Opera	\$151M
Metropolitan Opera Association	\$80M
Los Angeles Philharmonic Association	\$80M
Lyric Opera Chicago	\$71M
San Francisco Opera	\$61M
Detroit Symphony Orchestra	\$58M
Los Angeles Opera	\$57M
St. Louis Symphony Orchestra	\$51M
Dallas Symphony Association	\$47M
Jazz at Lincoln Center	\$47M

Source: Candid

We can explain the fundraising success of opera companies and orchestras in part to their longevity and deep connections to the ultra-wealthy of our nation. The Metropolitan Opera was founded in 1880, the Los Angeles Philharmonic in 1919, and St. Louis Symphony Orchestra in 1880. The organizations have built lasting philanthropic connections with affluent funders that view them as indispensable cultural anchors in their home regions.

These are precisely the kinds of organizations that are well-positioned to withstand the pandemic, argues Howard Gilman Foundation Executive Director Laura Aden Packer. “To be honest, I think that the larger institutions in the city, most of them—not all of them, but most of them—have endowments. They have well-resourced board members. So in a way, I’m certainly less worried about them than I am about mid-sized organizations.” In March 2020, one such large institution, the Metropolitan Opera, launched a campaign to raise \$60 million to offset pandemic-related box office losses.

Top 5 Funding Priorities: Music 2014 - 2018 ²	
Subject	Amount Funded
General Operating Support	\$494M
Programs & Performances	\$71M
Arts Education	\$62M
Festivals	\$10M
Artist Services	\$3M

Source: Candid

That said, well-resourced organizations and their staffs will face unique financial challenges given their inordinately high personnel costs in a post-pandemic world. “Historically, labor agreements in the performing arts have been moving toward more money and better conditions,” said Thomas W. Morris, the former chief executive of the Cleveland Orchestra and the Boston Symphony Orchestra. Now, however, a growing number of orchestras are “agreeing to long-term cuts, recognizing that it could take years for audiences and philanthropy to bounce back after this extended period of darkened concert halls and theaters,” reports the New York Times’ Julia Jacobs.

Most of the organizations on Candid’s list of largest grant recipients have received funding from prominent grantmakers like Bloomberg Philanthropies, the MacArthur Foundation, the William Randolph Hearst Foundation, Kresge Foundation and the Knight Foundation.

The LOA’s “Orchestra Facts: 2006–2014” found that across the league’s 65 member orchestras, 43% of total income was classified as “contributed income,” 40% was “earned income,” and 17% was “investment income.” Commenting on the findings in 2016, LAO president and CEO Jesse Rosen said, “It’s shifting. It has been a transactional thing: We put on concerts, you buy a ticket, and we take your money, and that keeps us going, and everything is fine. Now, it is: What is the value we make in this community? Because it’s now primarily philanthropic support driving the engine.”

These figures remained relatively stable before the pandemic struck—a 2017 LAO survey of 138 orchestras also found that 43% of respondents’ total income came from “private support.”

OPERA America’s 2020 Annual Field report found that 52% of member companies’ revenue came from “private support,” 32% from “box office” revenue, 13% from “other earned,” which can include investment/endowment income, venue and production rentals, and other miscellaneous revenue, and 3% from “government support.”

Giving & Getting Deeper Dive

Candid research shows that total funding to music organizations jumped significantly from 2014–2015 and remained steady through 2018.

A strengthening U.S. economy helps to explain the 49% jump in giving between 2014–2015. According to Reuters, “U.S. economic growth in 2015 was the [best since 2005](#).” However, “momentum ebbed significantly in 2016, with the economy notching its weakest performance since the recession,” which can account for the 2% decrease in total giving from 2015–2016.

IP also looked at data from 2013 and found a 16% increase in giving from 2013 to 2014, a 16% increase. So giving was increasing before 2015, although the jump between 2014–2015 was particularly large. We couldn’t determine why

more grantmakers joined the fold between 2014–2015 and why total funding jumped 49%, but we theorize it may have had to do with the strengthening economy – 2015 was the high point of the post-Great Recession economic expansion; which ground to a “near halt” at the end of that year, possibly explaining the -2% drop between 2015-2016.

Candid found that 60% of the \$275 million in total reported foundation and DAF support from 2014–2018 flowed to operas and orchestras.

Inside Philanthropy’s August 2020 survey on the state of fundraising found that 51% of respondents cited revenues from “private and family foundations” as increasing in importance, followed by “smaller individual donors through general fundraising and online campaigns” (41%), large individual donors (40%), donor-advised funds (40%) and community foundations (36%).

Respondents cited “program revenue” as the top decreasing revenue source (59%), followed by corporate foundations (52%), government grants and contracts (42%) and smaller individual donors through events (including virtual events) (34%).

Year	Dollar Value of Grants	Grantmakers	Grants Awarded	Recipients	Year-over-Year trend in total funding
2014	\$625M	9,310	32,101	7,710	--
2015	\$933M	10,901	45,339	9,301	+49%
2016	\$914M	10,589	45,926	9,663	-2%
2017	\$898M	9,784	31,251	8,211	-2%
2018	\$939M	10,176	32,440	9,094	+5%

Source: Candid

This brief’s “Who’s Getting” section underscores the outsized role affluent opera companies and symphony orchestras play across the fundraising ecosystem of the nonprofit music sector. Yet the field is replete with funders supporting organizations and artists in smaller “niche” funding areas like jazz (the Jazz Foundation of America, Knight Foundation, Ford Foundation), choral music (Chorus America, McKnight Foundation and Young Singers Foundation), folk (Folk Alliance International and Joyce Foundation), contemporary American music (the Aaron Copland Fund for Music and Amphion Foundation), new music (New Music America), as well as fields like music education (Grammy Foundation, NAMM Foundation, Mr. Holland’s Opus Foundation) and higher ed (Presser Foundation).

Non-classical/opera organizations that received substantial funder support from 2014–2018, based on Candid data, include the Young People’s Chorus of New York City (\$4.9 million), Chicago Children’s Choir (\$4.7 million), Chicago’s Old Town School of Folk Music (\$3.8 million), Los Angeles Master Chorale (\$3.6 million), and the Boston Children’s Chorus (\$3 million).

Other notable nonprofits in the field include Vocalessence (Minneapolis), Jazz Aspen Snowmass (Aspen, Colorado), Indianapolis Children’s Choir, Ellis Marsalis Center for Music (New Orleans), and Berkeley Society for the Preservation of Traditional Music (Berkeley, California).

The Big Issues & Beyond

Prior to the 2020 pandemic, funders’ top issues included raising the profiles of organizations in small to mid-sized American cities, supporting capital campaigns, and boosting efforts to reach new audiences.

In 2017, the Detroit Symphony Orchestra received a combined \$18.5 million from the William Davidson Foundation, Andrew W. Mellon Foundation, the Fred and Barbara M. Erb Foundation and Dresner Foundation. Grantmakers earmarked the funds for the orchestra’s Neighborhood Concert Series and endowment. “We want this world-class orchestra—this community jewel—to enrich audiences in our region and across the globe for generations to come,” said Davidson representative and DSO board member Ralph Gerson.

Other regional organizations that received substantial gifts prior to 2020 include Louisiana State University College of Music & Dramatic Arts (\$4 million), Cleveland Orchestra (\$9.3 million), and Arizona Opera (\$2 million).

As is the case in other corners of philanthropy, funders continued supporting ambitious capital projects. In 2018, the 13th-largest grantmaker on Candid’s list, the San Francisco-based William K. Bowes, Jr. Foundation, made a \$46.4 million gift to support the expansion of the San Francisco Conservatory of Music’s campus and the construction of the Ute and William K. Bowes, Jr. Center for Performing Arts—according to the conservatory, it was the largest single gift ever made to a conservatory or music school for a new facility.

The two biggest recipients of philanthropic dollars—opera companies and orchestras—faced foreboding demographic trends long before the pandemic struck. Experts point to aging audiences as an “ominous indicator” that opera continues “on a slow, inexorable death spiral,” wrote the New York Times’ chief classical music critic Anthony Tommasini, who went on to note that the Metropolitan Opera’s average subscriber was 65 years old in 2019. By contrast, the average age of the

Broadway audience has hovered between 40 and 45 for the past two decades.

Opera companies also grappled with the long-term decline in season subscribers, a trend that “is upending the already fragile economics of opera” and “changing how companies operate and what they program,” wrote the Times’ Michael Cooper in 2018. At the same time, smaller organizations worried about diminished attendance, especially among younger and less affluent audience members.

In an effort to address these challenges, the Wallace Foundation launched its \$52 million Building Audiences for Sustainability initiative to help performing arts organizations boost engagement and reach new audiences. For example, the foundation published a case study showing how the Seattle Symphony used market research techniques to successfully engage new residents in the city.

One of the biggest issues funders IP spoke to is the constellation of challenges revolving around how to advance equity and inclusion across the nonprofit music field. This brief will explore these issues in greater detail in the “Perspectives on Equity” section.

The 2020 pandemic presented a new fight for survival for many nonprofit music organizations. In the early days of the pandemic, funders quickly pivoted to provide shuttered organizations with emergency support. A few months later, the murder of George Floyd and subsequent calls for social and racial justice amplified funders’ pre-2020 efforts to boost equity and inclusion across the performing arts space. With live gatherings not slated to resume until the fall of 2021, funders remain committed to ensuring organizations’ long-

term financial sustainability and providing support for individual artists while boosting representation across the field.

Grantee Spotlight



In 2017, the Detroit Symphony Orchestra received a combined \$18.5 million from the William Davidson Foundation, Andrew W. Mellon Foundation, the Fred and Barbara M. Erb Foundation and Dresner Foundation. Grantmakers earmarked the funds for the orchestra’s Neighborhood Concert Series and endowment.

In 2019, DSO received a \$25,000 Catalyst Fund grant from the League of American Orchestras. The awards was given to only 23 orchestras across the country and is intended to help advance diversity, equity, and inclusion in member orchestras

At the onset of the pandemic, the average American symphony had fewer than 15 days of working capital, according to Brett Egan, president of the DeVos Institute of Arts Management at the University of Maryland. Moreover, unlike theater companies, many music organizations like orchestras had a large number of artists on payroll. “That’s a huge challenge when you don’t have income coming in to pay them,” Bonfils-Stanton Foundation President and CEO Gary Steuer told IP.

Funders quickly grasped the severity of the pandemic and rolled out emergency relief to musicians and shuttered organizations. In April 2020, grantmakers launched the \$10 million Artist

Relief Fund, which provides unrestricted \$5,000 grants to practicing artists in fields like music, dance and theater. By September, the fund had raised nearly \$20 million and announced it would extend its grantmaking through December. Three months later, the New York Community Trust announced that its NYC COVID-19 Response & Impact Fund raised more than \$110 million for emergency grants and zero-interest loans to cultural organizations.



“How organizations differentiate themselves and their programming is crucial. When we collaborate with an arts nonprofit, we want to understand how its vision or concept is unique. That’s what most funders want to hear about because the current landscape is one where virtually all arts organizations are taking a closer look at how they operate and move forward.”

—Debbie Marshall, senior vice president, client and community relations director, PNC

Smaller funders like Early Music America, a service organization for studying and experiencing early music and historical performance, also rolled out emergency support. “The pandemic brought with it a problem I hadn’t encountered before at Early Music America, which was a huge outpouring of support to a relief fund for early musicians that we launched in March, shortly after the shutdown,” said Executive Director Karin Brookes. “Early music is a very niche field, whose supporters make up for their small numbers in passion for the music and those who perform it, especially as the vast majority of musicians are freelance.”

Leaders immersed in music philanthropy told IP that certain segments of the artistic population

were unable to access financial support. “Our biggest challenge right now is the sheer demand for our support compared with the funds we’re able to give,” said Vanessa Reed, president and CEO of New Music USA, which has rolled out two emergency funds since March 2020. “Fundraising is more challenging now than it was at the start of the pandemic because people are concerned about their personal finances and challenged by how to respond to so many competing needs.”

Leaders told IP that artists faced barriers to entry that prohibited them from accessing emergency funds “because they either didn’t know how to access them or they didn’t have the technical ability to complete the applications,” said Chamber Music America’s Lioi. “Although many, many deserving musicians received emergency funding, probably an equal number—if not more—did not.” In response, CMA rolled out “simple and effective” emergency funds aimed at these audiences.

As venues remain shuttered, funder representatives worry about the pandemic’s long-term ripple effects. “When a symphony has to furlough their musicians for nine months, how many of them can afford to stay in the community?” Bonfils-Stanton’s Steuer said. “Are they going to find another profession? Are the artists still going to be in the community?”

Funder Trends & Strategies

Prior to 2020, performing arts organizations implored funders to cut red tape and give a greater voice to the communities they serve. When the pandemic struck, grantmakers responded. “It takes philanthropy a while to change or even consider making a change; we don’t have that luxury anymore,” said Howard Gilman Foundation senior program officer Anna Campbell. The major trends

in the music funding space include embracing general operating support and optimizing virtual programming.

In the early days of the pandemic, grantmakers converted funding into general operating support, which is “the most flexible form of funding and puts the organization in control of how it gets spent,” said Cate Fox, senior program officer at the MacArthur Foundation’s Chicago Commitment.

IP research suggests that grantmakers will continue to provide this funding after the pandemic subsidies. “General operating support is like gold—there should be more of it,” said Karen Newell, director, external affairs, of the Baltimore-based Mid-Atlantic Arts Foundation, whose Mid Atlantic Tours program is a curated roster program of performing artists and ensembles chosen to tour throughout the mid-Atlantic region.

The pandemic also accelerated the pace of digital engagement and innovation at performing orchestras. “We have been adapting our regular programming to reflect the realities of the pandemic,” said Ivan Schustak, communications director at the Atlanta-based service organization South Arts. “Many of our programs normally support exclusively out-of-state tours for artists, but we have modified our guidelines to support in-state and virtual engagements.”

F. Javier Torres-Campos, program director of the Surdna Foundation’s Thriving Cultures program, told IP, “One of the critical transcendent issues that we are seeing—and will continue to grapple with—is the purchase, integration, and distribution of virtual and/or immersive technology equipment and content during and beyond the COVID-19 health crisis.”

Some funders are clear-eyed about virtual programming’s long-term potential. “If you look at the data, there’s been a huge consumption of arts and culture, but fewer examples of how it’s been monetized online,” said Judilee Reed, program director of Creative Communities at the William Penn Foundation. Some observers may note that sales of recordings have long been a part of the revenue mix for operas, symphonies and other nonprofit music organizations, but in fact, that revenue has rarely amounted to a significant source of support for most music organizations.

Inside Philanthropy’s survey of performing arts fundraisers corroborates Reed’s takeaway. Only 29% of respondents said that “smaller individual donors through events (including virtual events)” were increasing in importance. Thirty-four percent cited a decrease, while 33% said revenues were “about the same.”

Inside Philanthropy August 2020 Survey

“Our grantees are closed and have no income. They have furloughed and laid off staff. Many are moving to online content, but not all have the resources to do so, and the online model cannot provide the same level of revenue that live performance would.”

—Foundation professional, Fredericksburg, Virginia

Perspectives on Equity

Segments of the music field, like opera and symphony orchestras, have been the subject of equity critiques for decades. The events of 2020 compelled funders to accelerate efforts to boost inclusion across the field. This section will look at data illustrating the racial composition of select music fields, explore some of the challenges facing distinct demographic groups and profile emerging funder strategies to best advance representation.

The Sphinx Organization was founded in 1997 by violinist Aaron P. Dworkin to boost the representation of people of color in classical music by awarding grants to artists and helping orchestras implement DEI initiatives. “There was no such terminology like ‘diversity and inclusion’ when we launched,” President and Artistic Director Afa Dworkin told IP. Sphinx has received support from the Andrew W. Mellon Foundation, the Knight Foundation and the Fund II Foundation.

In 2015, Grantmakers in the Arts published a “Racial Equity in Arts Funding Statement of Purpose” that made racial equity in arts funding a primary focus. Three years later, the LAO launched two funder-supported initiatives to increase diversity, equity and inclusion (DEI): the Catalyst Fund, which awards grants to U.S. orchestras “to strengthen their understanding of equity, diversity and inclusion and to help transform organizational culture”; and the National Alliance for Audition Support.

According to the most recent statistics available in a 2016 report released by the LAO, the proportion of Asian/Pacific Islander orchestra musicians increased from 5.3% in 2002 to just over 9% in 2014. Hispanic/Latino representation rose from 1.8% to just 2.5% while the percentage of African American musicians hovered at around 1.8%. Between 2010 and 2016, black conductors and music directors accounted for just 2% to 6% of the field.

Aaron Flagg, chair and associate director, Juilliard Jazz, [attributes these disparities](#) to “an ignored and uncelebrated history of minority artistry in classical music (by composers, conductors, performers and managers); ignorance of the history of discrimination and racism against

classical musicians of African American and Latinx heritage by the field; and a culture in the field that is indifferent to the inequity, racial bias, and microaggressions within it.”

“Until we do away with this misconception that every time we talk about diversity, we have to lower our artistic standards, we’re not going to move forward in a sustained way,” Sphinx’s Dworkin told IP. “I think that’s true for philanthropic institutions and the practitioners.” Moreover, she said, performing arts houses “don’t do enough, in my mind, by way of prioritizing music by non-white artists and composers,” nor have institutions made significant progress in cultivating leaders or board members of color.

Grantee Spotlight

Sphinx

Aaron P. Dworkin • Founder

In 2019, Robert F. Smith’s Fund II Foundation gave Sphinx its largest grant in its history—\$3 million in support of leadership and development programs for classical musicians, arts administrators and cultural entrepreneurs of color, including Sphinx Connect, a networking conference.

Smith has also provided support for the Sphinx Virtuosi professional chamber orchestras; Sphinx LEAD, a two-year leadership program designed to evolve the industry landscape by empowering the next generation of executive leaders in partnership with Carnegie Hall; and Sphinx Venture Fund, in which Sphinx provides funding to help classical music organizations roll out diversity, equity and inclusion initiatives.

Events across the summer of 2020 compelled Black artists to speak out “about the lack of representation not just in orchestral repertoire, but also in administration, community engagement and [the players onstage](#),” wrote the New York Times’ Joshua Barone. These concerns strongly resonated with equity-minded funders and smaller organizations that have been seeking to remedy inequities in the field for years.

In June, the LAO published a statement on its site that read: “There is an urgent need for white people and predominantly white organizations to do the work of uprooting this racism,” it says. “We recognize that for decades, in our role as a national association and voice for orchestras, we have tolerated and perpetuated systemic discrimination against Black people, discrimination mirrored in the practices of orchestras and throughout our country.”

A study by the Institute for Composer Diversity reported that of the 4,066 works scheduled to be performed by 120 American orchestras in the 2019–20 season, only 8% are by women. As of October 2020, 9.2% of all orchestras in the U.S. were directed by women, according to the most recent figures published by the LAO. Marin Alsop is the only female music director of a major American orchestra since joining the Baltimore Symphony in 2007.

When asked to theorize why there are so few female conductors, Alsop told the BBC, “I don’t know that I could call it overt prejudice, but I interpret it as a societal lack of comfort. It’s not what people are used to, and therefore, we don’t gravitate toward it.” Alsop created the Taki Alsop Conducting Fellowship to cultivate female conductors. “I feel strongly that one of the only ways to do that is to create a culture of mentorship, so we help the people coming up that we believe in and give them opportunities,” she said.

“Institutional structures have not served disabled artists in the past,” said Emil Kang, program director for arts and culture at the Andrew W. Mellon Foundation. In response, in October 2020, Mellon partnered with the Ford Foundation to launch the Disability Futures Fellows, the only national award for disabled arts practitioners. The fellowship will directly support the work of 20 disabled artists across the country, with each receiving a \$50,000 grant administered by United States Artists.

In 2019, the *New York Times*’ Siobhan Burke asked Indigenous artists to explain the lack of visibility for Indigenous performing arts groups across the U.S. “Here, it’s kind of stuck into a corner of folk or community practice, or traditional or ritualistic,” said Vallejo Gantner, the former director of New York City’s Performance Space. Burke’s piece



“[There is] an ignored and uncelebrated history of minority artistry in classical music (by composers, conductors, performers and managers); ignorance of the history of discrimination and racism against classical musicians of African American and Latinx heritage by the field; and a culture in the field that is indifferent to the inequity, racial bias, and microaggressions within it.”

—Aaron Flagg, chair and associate director, Juilliard Jazz

coincided with the launch of a pilot program, the Global First Nations Performance Network. Developed during the 2019 First Nations Dialogues New York/Lenapehoking, a series of Indigenous performances and discussions funded, in part, by the Jerome, Doris Duke Charitable, and Andrew W. Mellon foundations, the network will include 15 institutions from Canada, Australia and the U.S. dedicated to commissioning and presenting works by Indigenous artists.

Other organizations promoting Indigenous musicians include the First Peoples Fund, a grantmaker that supports First Peoples artists and culture bearers, and the Western Arts Alliance's Advancing Indigenous Performance Program, which has received funding from the Andrew W. Mellon Foundation.

Vanessa Rose, president, American Composers Forum, a prominent regrantor whose funders include the Knight and Jerome foundations, as well as, Wells Fargo, best encapsulates funders' broader approach to advancing equity in the music field: "We hope to promote greater emphasis on the impact of music and break down the silos in and around the Western European classical genre: creating more equity for diverse composers, reducing the overrepresentation of whiteness inside organizations, and providing relevant and compelling musical experiences for audiences."

At an operational level, funders are advancing equity through two main activities: rolling out programs aimed at increasing the representation of individual artists, boosting access to grants by broadening engagement efforts with BIPOC-led organizations, no longer linking grant size to an organization's budget, and simplifying the application process.

Funders have launched programs, prizes and fellowships that "raise awareness, advocate for change and direct investment to those who've not had access to opportunities in the past," said New Music USA's Reed. The LAO's Catalyst Fund is a three-year pilot program that builds the internal capacity of member orchestras to foster effective DEI practices. The fund is underwritten by the Andrew W. Mellon Foundation with support from the Paul M. Angell Family Foundation. The Sphinx Organization has provided over 500 artist project/career grants totaling more than \$2.7 million to Black and Latinx classical artists in the last five years.

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"My organization is racially diverse, LGBTQ promoting, non-sexist, non-ageist and offers free events to the community including seniors and Latinx and African Americans, and we have been rejected by every grant organization because we aren't large enough."

—Fundraiser, Monmouth Beach, New Jersey

The Virginia B. Toulmin Foundation funds the Women Composers Readings and Commissions Program, an initiative of the LAO in partnership with American Composers Orchestra. Since the program's inception in 2014, 40 women composers have benefited from career development and 16 composers have received commissions.

"Practicing equity begins at home," said CMA's Lioi. "We, as funders, have to look internally to examine our own protocols, guidelines, applications and processes before we ask applicants to do the same." Lioi told IP that leaders looking to boost inclusion must choose from one or both of two approaches:

“Funding white organizations to diversify their programming, operations, etc., and funding organizations of color that are already doing the work of serving constituents of color. Both have their own outcomes, presumably, but I believe the second option must be included in any funder’s strategy.”

To Lioi’s point, in 2017, a study by Helicon Collective found that only 4% of arts funding flowed to groups whose primary mission is to serve communities of color. The collaborative’s co-Director Alexis Frasz told IP that funders must recognize that many diverse organizations may not look like typical arts organizations since they often do intersectional work across multiple areas like housing, youth development and economic development.

For example, before launching its Culture, Equity, and the Arts initiative, the MacArthur Foundation defined an arts organization as one whose sole mission was the “creation and exhibition or production of art.” While this definition covered organizations like symphonies, which primarily serve white audiences, it “had the unintended consequence of excluding significant parts of the city’s population and a variety of art forms and genres,” according to MacArthur’s Fox.

MacArthur’s experience suggests the onus must be on the funder to engage historically underleveraged groups. “It isn’t reasonable for a funder to expect smaller, community-based organizations that have never been funded by that particular funder to boldly apply,” Lioi said. “It’s the same principle as expecting audiences of color to attend performances of an organization that has not been welcoming to them in the past.”

There are an increasing number of examples of how performing arts funders are expanding their footprint with historically under-engaged BIPOC organizations.

Jennifer Coleman, who oversees the George Gund Foundation’s Creative Culture and Arts Program, told Inside Philanthropy she drew up a list of BIPOC arts organizations that had been “shut out of the grantmaking process” through such practices as going online, cold-calling groups, and asking nonprofit leaders to recommend peers. Other funders are working with consultants, holding community town halls and partnering with local service organizations and regrantors to expand their network of diverse organizations.



“It is a privilege to be in a position to impact the lives of aspiring women conductors. I can clearly see what is needed to assist emerging conductors in the pursuit of their dreams and want to make the road easier and more rewarding for them. I have never ascribed to the philosophy that, ‘It was tough for me so it will be tough for you.’ My philosophy is: ‘It was tough for me so that I could make it easier for you.’”

—Marin Alsop, founder and former conductor, Concordia Orchestra; founder, Taki Alsop Conducting Fellowship

Leaders are also addressing grantmaking guidelines that serve as barriers to entry for BIPOC-led organizations. Funders' practice of linking grant size to organizational budget size shuts out organizations of color that "may not have the kinds of fixed assets that a larger organization will have," said Doris Duke's Knighton. Funders have taken note. The MacArthur Foundation's Culture, Equity, and the Arts initiative and the Ford Foundation's America's Cultural Treasures do not link grant amounts to an organization's size.

Resource-intensive grant applications can unwittingly exclude diverse music organizations run by non-English speakers, those that can't afford to hire a professional grantwriter, or those that lack access to technology and requisite manpower. The Mid-Atlantic Arts Foundation's Newell encourages fellow funders to "provide alternative means of applying, such as videos, interactive interviews, phone calls even."

Whether directly funding BIPOC-led organizations or helping predominantly white groups diversify their programming, funders can draw on the following advice from New Music America's Reed: "There are many factors that contribute to advancing equity in grantmaking: asking organizations to provide information about their social justice policies when they apply; improving the data collected from your portfolio of applicants and grantees; ensuring a diverse cohort of assessors; promoting the call far and wide through channels which reach previously marginalized groups; and focusing on each organization's staff and leadership, as well as the artists presented on stage."

While LGBTQ people have long been an important part of the opera audience (putting stereotypes aside, audience research provides some

substantiation), companies rarely depict the experiences of gay people on stage. The New Yorker music critic Alex Ross attributes this partly to classical music's history of wariness of openly queer performers, composers and stories. "But in the last 10 years," he said, "there's a sense that these old barriers are no longer present, and that LGBTQ-themed works are being actively cultivated." By tackling contemporary and universal topics, American LGBTQ opera aligns with funders' efforts to boost engagement and make the "high-brow" performing arts more inclusive.

The logo for Chamber Music America, featuring the words "Chamber Music America" in white text on a dark blue rectangular background.

"We, as funders, have to look internally to examine our own protocols, guidelines, applications and processes before we ask applicants to do the same. Funding white organizations to diversify their programming, operations, etc., and funding organizations of color that are already doing the work of serving constituents of color. Both have their own outcomes, presumably, but I believe the second option must be included in any funder's strategy."

—Margaret Lioi, former CEO, Chamber Music America

A Closer Look at Funder Types

Private Foundations

As noted in the “Who’s Getting” section, private and family foundations play a critical role in the world of music. These entities focus on priorities like DEI initiatives, programming and project-based support, generally providing less direct support for individual artists.

The music sector’s largest institutional grantmaker, the Andrew W. Mellon Foundation, has provided support for some of the sector’s most ambitious DEI programs, often in partnership with regrantors and art service organizations.

Examples include League of American Orchestra’s Catalyst Fund, Chamber Music America’s Classical Commissioning initiative, and the National Alliance for Audition Support. Launched with Sphinx, the New World Symphony, and the LAO, the alliance trains musicians for auditions, pairs them with mentors, and provides travel stipends. Other Mellon foundation regranting partners include First Peoples Fund, National Performance Network, New Music USA, OPERA America, and Sphinx Organization.

In June, the foundation’s board of trustees approved a plan to boost giving in 2020 from \$300 million to \$500 million. Mellon’s commitment was part of a broader partnership between the Doris Duke Charitable, Ford, W.K. Kellogg, and MacArthur foundations designed to unleash over \$1.7 billion in enhanced grantmaking. Later in the month, the foundation, which has a \$6.5 billion endowment, announced it would prioritize social justice in all of its grantmaking.

Enterprise Rent-A-Car Company founder Jack Taylor created the Crawford Taylor Foundation in 1997 to support organizations in the Greater St. Louis area. Taylor passed away in 2016. His son, Andrew C. Taylor, is the foundation’s director and vice president. Grant recipients include the St. Louis Symphony Orchestra and the Arts & Education Council of Greater St. Louis. In 2019, the foundation made a \$10 million gift to the St. Louis Municipal Opera Theatre’s Second Century Capital Campaign. The foundation earmarked half of the gift for the theater’s education efforts, which were renamed the Crawford Taylor Education Initiative. As a relatively young foundation established by a billionaire entrepreneur, the funder is something of an anomaly in a space dominated by legacy institutions and donor-advised fund managers.

The Lilly Endowment, the third-largest private foundation on Candid’s list, “has a long history of grantmaking to support arts and cultural organizations of all types, including music organizations,” Communications Director Judy Cebula told Inside Philanthropy. “We believe that these organizations add joy and meaning to our lives and play an important role in building and strengthening communities. We view this sector holistically and do not have a separate grantmaking strategy for music organizations.” The endowment’s grantmaking primarily focuses on organizations operating in Indiana. Grant recipients include Classical Music Indy, Indianapolis Children’s Choir, and the Philharmonic Orchestra of Indianapolis.

The Avenir Foundation was the fourth-largest institutional grantmaker to music organizations from 2014–2018, according to Candid. Its music grantmaking mostly focuses on Colorado-based organizations. Grantees include the Ars Nova

Singers, Central City Opera, and Opera Colorado. In 2015, the foundation awarded the Colorado Symphony a challenge grant commitment of \$25 million to build the symphony's endowment. Foundation Vice President William Dodge Wallace called the symphony a "valuable cultural institution to the city of Denver. It's priceless, really. To lose it would be a real tragedy. We have deep convictions about that."

The William Penn Foundation's performing arts giving focuses on organizations in the Greater Philadelphia area. Grantees include the Philadelphia Chamber Music Society, Opera Philadelphia, and music education organization Musicopia. Judilee Reed, the foundation's program director of creative communities, told IP that moving forward, "we need to make the pivot to relevance and how it relates to people and what they want at a really local level. That will get us to a

Funder Spotlight MacArthur Foundation

MacArthur launched its Culture, Equity, and the Arts initiative in 2019. The initiative included programmatic changes like developing more inclusive grantee selection criteria, implementing a participatory grantmaking process, and no longer basing grant awards on an applicant's annual budget size.

Organizations with budgets of more than \$2 million may apply directly through MacArthur's online portal. Those with annual budgets of \$500,000 to \$2 million and \$500,000 or less, apply through the Prince Chartable Trust and Richard H. Driehaus Foundation. Both are long-standing partners of the foundation.

program of grantmaking that makes more sense from a racial equity perspective."

The field also consists of funding entities affiliated with nonprofit music industry organizations like the Grammy Foundation, the ASCAP Foundation, and the Academy of Country Music's charitable arm, Lifting Lives.

On the whole, institutional funders typically fund organizations rather than individual artists, "which has inadvertently left artists at the far end of many power dynamics," said South Arts' Schustak. Artist-endowed foundations, defined by the Aspen Institute as a private foundation "created or endowed by a visual artist, the artist's surviving spouse, or other heirs or beneficiaries to own the artist's assets for use in furthering charitable and educational activities," also provide considerable support to individual musicians. Examples include the Kurt Weill Foundation and the Les Paul Foundation.

Corporate Giving

As noted in the "Who's Giving" section of this paper, corporate support covered only 3% of unrestricted contributed revenue for symphony orchestras, 2% for operas, and 3% for music

Corporations tend to approach philanthropy differently than private foundations. "A lot of corporations have questions about 'what do you have in terms of programs that I can put my name and logo on now?' and that's just different from a private foundation," said Jerome Foundation President Ben Cameron, who is the former manager of community relations at Target Stores. "A private foundation isn't looking for market share; corporations, though, have a bottom-line responsibility to shareholders.

Corporate support for music organizations frequently takes the form of sponsorships—a business transaction in which the sponsor pays or gives the organization money in exchange for something “that will help them make more money, be it through alignment with the property,” or through sales, brand development, public relations or employee engagement, according to the Partnership Group.

For example, Metropolitan Opera corporate sponsors receive extensive benefits commensurate with the level of support, which may include concierge service for ticket reservations, “client entertaining opportunities,” and “complementary use of private patron coat check.” Corporate patron benefits range from \$2,750 (“Corporate Patron”) to \$100,000 (“Corporate Council Sponsor.”)

Research from International Events Group (IEG) found that sponsorship spending on performing arts organizations increased 3.7% from 2018—the largest year-over-year increase since 2006. Banks were eight times more likely to sponsor the arts than the average of all categories. IEG named Bank of America as the “most active sponsor” in the

symphony orchestra field. Bank of America and US Bank were tied as the “most active sponsor” in opera.

Surveys on corporate giving for the arts often fail to differentiate between charitable contributions and sponsorships, making it difficult to gauge the true extent of corporate philanthropic support for the music field.

In 2018, the Conference Board reported that 65% of 113 corporate survey respondents support the music field. That figure jumped to 81% for the 16 surveyed companies with annual revenues exceeding \$25 billion. “Financial contributions typically come from philanthropy/foundation budgets,” the report states, “but companies often fund their support through sponsorship budgets as well, which could explain the high response rate of companies making financial contributions.”

Companies also set up corporate donor-advised funds to serve as their corporate foundations. For example, in 2019, nearly 4,000 employees used their employers’ matching dollars to donate more

Corporate Giving Spotlight



PNC Arts Alive is a multi-million-dollar initiative through the PNC Foundation designed to support the visual and performing arts. Since its inception in 2009, the initiative has awarded more than \$18 million in grants cultural organizations in Central Ohio, Southeast Florida, Greater Philadelphia, Southern New Jersey, Delaware and Greater St. Louis.

Debbie Marshall, PNC’s senior vice president and community relations director told IP that she and her team are exploring how PNC Arts Alive will evolve in the months and years ahead. “It’s about creating an inclusive environment where all feel welcome and asking how organizations are being inclusive and equitable in what they’re offering to audiences. It’s about expanding the thought process around defining the audience and aligning programming to be accessible to that audience.”

than \$5 million to charities through the Greater Kansas City Community Foundation. In addition, companies often match employee contributions to nonprofits. Companies that match contributions to Lyric Opera of Chicago include Boeing, McDonald's Corporation and Sony Pictures Entertainment.

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"Funding from traditional foundations and legacy corporate gifts are being directed to social services and food insecurity and away from the arts. Arts is viewed as discretionary, value-added and non-essential."

—Advancement professional, San Antonio, Texas

Record companies also provide support to music organizations and artists. Labels like Universal Music Group and Sony announced ambitious efforts to support organizations advancing social justice and racial equity throughout the summer of 2020. Looking ahead, New Music USA's Reed told IP she hopes industry-related organizations will adopt a similarly partnership-oriented approach to their cultivation of artistic talent. "Major record labels and tech companies need to invest in R&D when it comes to identifying artists for their services," she said. "Why not diversify by collaborating with specialist nonprofits instead of keeping everything in-house?"

The following list includes major corporate supporters of nonprofit music organizations—with the caveat that some of this support may take the form of sponsorships rather than charitable giving: Aetna, American Airlines, American Express, Ameriprise Financial, Bank of America, DTE Foundation, Ford Motor Company, HSBC Bank, JPMorgan Chase, KeyCorp, Mercedes Benz, PNC Bank, Rolex, and the Walt Disney Company.

Community Foundations

Community foundations provide critical support to music organizations. Like corporations, "arts and culture" represents a small percentage of total community foundation grantmaking—typically between 5 to 8%. Community foundation giving to the arts frequently flows from donor-advised funds, which is essentially individual giving.

The Greater Kansas City Community Foundation (GKCCF) was the music sector's fourth-largest grantmaker and the largest community foundation grantmaker for music from 2014–2018, according to Candid. In 2019, giving from GKCCF's donor-advised funds accounted for 51% of its \$464 million in grants. Nine percent of DAFs focused on arts, culture and humanities charities.

The Minneapolis Foundation's 2017 annual report stated it disbursed nearly \$60 million in Minnesota and globally that year. At 10%, "Arts, Culture & Humanities," was the sixth-highest funded area.

Jewish community foundations are significant givers to music. Recipients of funding from the Jewish Community Foundation of San Diego include the La Jolla Music Society, the Curtis Institute of Music, San Diego Opera, Opera Hope, Vista, Youth Philharmonic Orchestra, and the San Diego Symphony Orchestra Association. Combined Jewish Philanthropies of Greater Boston recipients include Jewish Arts Collaborative, Zamir Chorale of Boston, and the Vilna Shul, Boston's Center for Jewish Culture. The funder launched an Arts and Culture Initiative in 2019 to support Jewish arts and culture community within Greater Boston through grants and Community Creative Fellowships.

Community foundations provided critical support for music organizations during the early days of the

pandemic. Most notably, the New York Community Trust's NYC COVID-19 Response & Impact Fund received donations from more than 1,300 donors, which allowed it to provide \$29.4 million in grants to arts and culture nonprofits in the early days of the pandemic.

“Though the city has had urgent needs for food and healthcare, New Yorkers also recognized that the arts are important to the quality of their own lives and to the economic health of the city,” Kerry McCarthy, the trust’s vice president for philanthropic initiatives, told IP. “Donors know that the arts are created by dedicated workers—whose efforts contribute a stunning 4.2% to the country’s gross domestic product—and their livelihoods have been threatened by the pandemic. Whether they experience art on the streets or a computer screen, our donors know that New York remains the heartbeat of our nation’s cultural sector, and direct grants from our donor-advised funds stayed strong in 2020.”

Major Donors

Individual major donors tend to earmark gifts for endowed leadership positions, construction and renovation projects, programming and educational activities, as well as university music programs and initiatives. A big question for music organization leaders is the extent to which donors’ support for DEI initiatives will match that of institutional funders and grantors.

Large donors typically attach themselves to established “high-brow” organizations like opera companies and symphony orchestras. Examples include Ted and Dianne Taube’s \$6 million gift to support the San Francisco Opera’s general director position, a \$10 million commitment from local patrons Margaret and Michael Valentine to support

the construction of the Cincinnati’s Ballet’s new home, and Ann S. Bower’s \$5 million gift for the Chamber Music Society of Lincoln Center’s residency programs.

Major Donor Spotlight: Taylor Swift



Taylor Swift donates to a number of charitable causes ranging from wildlife conservation to sexual assault survivor programs. In the music space, Swift’s largest charitable contributions come from benefit concerts. In 2009, she performed in the Sydney Sound Relief Concert, raising \$3.3 million to help those impacted by the widespread brush fires. Other musical charities supported by the recording artist include MusiCares and the Save the Music Foundation.

Donors also provide support to university music programs. Examples include a \$20 million gift from Alan and Daveen Fox to the University of Arizona’s School of Music, and John Turner and Jerry Fischer’s \$4 million gift to the Louisiana State University College of Music & Dramatic Arts earmarked for unrestricted endowed support to LSU Opera and renovating the college’s performance space.

Broadly speaking, many performing arts donors are motivated by a qualitative “arts for art’s sake” mentality. “I boil it down to one thing,” Grammy-award winning philanthropist Herb Alpert told IP. “Whether a painter, sculptor or actor, it’s all about the feel, the magic thing you can’t put your

finger on.” Alpert’s music-related commitments include over \$17 million to the Harlem School of the Arts and funding for post-secondary music education at UCLA and CalArts.

This mentality fuels concerns among some arts leaders that the individual donors who provide the lion’s share of the sector’s philanthropic dollars may not share foundations’ commitment to equity and inclusion. However, OPERA America’s Scorca cautioned against falling prey to such stereotypes. While he agreed that foundations often set the strategic grantmaking direction for a given performing arts field, he doesn’t rule out “fully activated, aware individual donors who understand what’s going on and want to help,” noting that individual donors bankroll some of OPERA America’s most important grant programs.

To his point, donors announced big equity-oriented music gifts over the summer of 2020 amid growing calls for social and racial justice. In June 2020, Ukraine-born billionaire Len Blavatnik, in partnership with Warner Music Group, announced a \$100 million fund to support charitable causes related to the music industry, social justice and campaigns against violence and racism. Four months later, music industry legend Jerry Moss

and his wife Tina Moss gave the Music Center a \$25 million gift to support three new program initiatives, including a new partnership with community organizations to uplift artists, with an emphasis on BIPOC audiences.

Other prominent donors to a wide variety of nonprofit music organizations include Steve Ballmer, Beyonce, Michael Eisner, David Geffen, Gordon Getty, Berry Gordy, Kenneth Griffin, Jimmy Iovine, Charles Koch, Frank McCourt Jr., Ron Perelman, Russell Simmons, Robert Smith, Taylor Swift, and Sandy and Joan Weil.

Donors also provide support through donor-advised funds housed at community foundations and DAF sponsors like Fidelity Charitable, the music sector’s largest grantmaker from 2014–2018. According to Fidelity Charitable, 7% of grants and 7% of grant dollars in 2018 flowed to arts and culture organizations. In contrast, Giving USA found that arts and culture represented 5% of total charitable giving during that year.

Looking ahead, music organizations are likely to be increasingly reliant on small donors and crowdfunding platforms. “Philanthropy can mean a lot of things, and issues like equity are bigger than

Major Donor Spotlight: Robert F. Smith



Robert F. Smith, founder of Vista Equity Partners, was elected chairman of Carnegie Hall’s board of trustees in 2016 and became the first African American to sign the Giving Pledge. Smith’s giving often flows through his Fund II Foundation, which prioritizes supporting musicians of color and music education. Since 2014, he has given around \$40 million to Carnegie Hall, much of which was directed toward education and social impact programs.

In 2020, Smith acknowledged that he failed to report over \$200 million in income 20 years ago and donated the money in the offshore trust structure to the Fund II Foundation. Smith signed a non-prosecution agreement with the government and agreed to pay large fines and cooperate with

institutional philanthropy and foundations,” said the Campbell of the Howard Gilman Foundation, which has provided support for music organizations like Orpheus Chamber Orchestra, Jazz at Lincoln Center, and World Music Institute. “We need to include all types of giving.”

Associations & Intermediaries

The music sector enjoys a robust network of entities providing funders with networking, advocacy and data gathering. However, there is not a grantmakers affinity group specifically for funders of music.

Grantmakers in the Arts (GIA) is the national network of private, public, and corporate arts funders focused on providing “leadership and service that advances the use of philanthropic and governmental resources to support the growth of the arts and culture.” GIA’s **Black Arts & Cultural Funding and Justice Resource Hub** aims to amplify funds and resources that explicitly center Black artists, cultural communities, and experiences. GIA serves grantmakers and does not distribute grants itself or host collaborative funds.

Americans for the Arts, whose primary focus is advancing the arts broadly in the U.S., is an important organization for the music community. Its website includes white papers, research on fundraising trends, and a **repository** of funding resources. Americans for the Arts does not directly distribute grants itself or host collaborative funds.

SMU DataArts’ mission is “to empower arts and cultural leaders with high-quality data and evidence-based resources and insights that help them to overcome challenges and increase impact.” SMU data arts provides informational resources and research for arts organizations, fundraisers, and arts grantmakers.

With lead funding from the Wallace Foundation and Barr Foundation, additional support from Art Bridges and the Terra Foundation for American Art, and participation from over 350 performing arts organizations, Culture Track’s “**Culture + Community in a Time of Crisis**” is national research and strategy initiative designed to “deepen our understanding of how arts and culture organizations can help their communities” and “how communities can support their arts and cultural organizations.”

The **Performing Arts Alliance** is the national policy advocate, leadership forum and learning network for America’s nonprofit performing arts organizations, artists and allies. The alliance’s site includes a page devoted to **charitable giving resources** and information. Members include Chamber Music America, Chorus America, New Music USA, and OPERA America. The alliance itself does not provide grants.

As mentioned in the Who’s Giving section, the music funding ecosystem includes important arts service organizations and regrantors that distribute funding, like Alternate ROOTS, American Composers Forum, Chorus America, Early Music America, Folk Alliance International, League of American Orchestras, MAP Fund, and more.

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“We organize cultural, classical music events in Europe and in New York. Musicians have found their careers cut short and engagements cancelled. With the social/economic effects of the virus taking their toll on society’s weakest, our funders are either not engaging in any open cultural events, or ensuring their own businesses are kept going.”
—Fundraiser, New York

Fundraising Now

Many music groups IP spoke with soldiered on during the difficult year and a half of the pandemic, and are beginning to look ahead to a brighter future, thanks to the generosity of loyal donors and institutional funders that stepped up.

David Zusman co-founded the We Are All Music Foundation in 2019, serves on its board, and has been working with 25 other volunteers to get the new grantmaking entity in Montclair, New Jersey, off the ground. The foundation seeks donations and supports music nonprofits dedicated to three social causes: health and wellness, education and underserved communities. It got its start during a tough time for nonprofits devoted to music, with venues shuttered, in-person classes and events canceled, and entire revenue streams locked down during the COVID-19 pandemic. At the same time, fundraisers faced a challenging landscape in which service providers and social justice groups took the spotlight, for good reason.

“We are a central voice for nonprofits nationwide using music to empower social change,” says Zusman. “Music is underappreciated as an avenue to achieve progress on social issues. Music is regarded as ‘nice to have.’ Instead, it should be regarded as an all-essential ingredient that really influences social causes.”

Raising money for a new music organization amid a global pandemic comes with challenges, Zusman acknowledges. Even well-established music charities have faced a sharp drop in revenue over the past 14 months due to canceled performances and shuttered venues. But as COVID cases and deaths decline in the United States and nonprofits start planning for live audiences again, multiple

fundraising experts say they’ve been pleasantly surprised that American music groups fared as well as they have during the health crisis.

Many music charities reported big increases in donations last year from loyal donors. The [Music Center](#) in Los Angeles, one of the country’s largest performing arts venues and home to the Walt Disney Concert Hall, announced in October 2020 a \$25 million gift for new programming, including free summer concerts, from Tina and Jerry Moss. “We were sensitive to the fact that all arts organizations don’t have this sort of support,” says Valentine Gelman, the center’s SVP of advancement. “This speaks to the power of the arts.”

COVID-related aid from the Paycheck Protection Program and other government funds has also been a lifeline for numerous music organizations, although such public aid has often been hard to tap. The [Music Hall](#) in Portsmouth, New Hampshire, lost 90% of its earned income last year, prompting the organization to let all part-time workers go, and by September, it also laid off 40% of its full-time staff. To cope, the Music Hall turned to state and federal agencies.

The Music Hall applied for a Shuttered Venues Operators Grant, part of a \$16.1 billion program included in the coronavirus recovery plan passed by Congress in December 2020. While the grants were designed to help arts organizations that could no longer earn money from concerts and other performances, the Music Hall was one of many to be frustrated when applications were delayed due to technical problems with the government portal administering the program. On June 15, the National Independent Venue Association reported that less than 1% of applicants had received any funds from the program.

Fortunately, foundations moved surprisingly quickly in making emergency COVID-related grants and relaxing their pre-pandemic restrictions and requirements during the health crisis. At [Chamber Music Pittsburgh](#), which had an annual budget of \$350,000 before the pandemic, giving was up substantially in its most recent fiscal year, which ended July 31, 2020. Foundation grants nearly doubled to \$140,000, up from \$71,500 in fiscal year 2019.



“The whole premise of the arts is bringing people together to make sense of an experience. Artists and arts organizations continue to do that; the only thing that has changed is, now, they receive little or no money. We owe it to artists and arts organizations to step up and support them in this moment.”

—Cate Fox, senior program officer, Chicago Commitment, MacArthur Foundation.

“The reason is the messaging we provided early in the pandemic, that we truly needed patrons to help us get to the other side,” says Kristen Linfante, the chamber music group’s executive director.

Another local organization, the [Mendelssohn Choir of Pittsburgh](#), saw a healthy increase in fundraising returns in 2020. At the end of its fiscal year on June 30, the choir had raised close to \$900,000, including a large in-kind gift, up from about \$650,000 in a typical year. A month ago, the choir hired a new director of annual giving. “Like everybody else, we

want to concentrate on growing individual giving,” says Mary Ann Lipinski, the choir’s executive director. But the choir had other difficulties, canceling five revenue-generating concerts while its staff shrunk by a third, Lipinski says. Like other music organizations, she says, the choir has dropped direct-mail solicitations in favor of cheaper online appeals for donors, and during the pandemic, it also took a more cautious approach with its individual supporters.

“We wanted to be sensitive to people’s lives being turned upside down,” says Lipinski. “It felt like we had to be more low-key in fundraising. We took advantage of [government aid] and elevated grantmaking by foundations. We looked more to our institutional givers in this period than to individuals.”

In a twist on traditional fundraising trends, in which larger, more sophisticated organizations usually have an edge, some of the country’s biggest music-focused nonprofits seem to be struggling more than their smaller counterparts. New York’s [Metropolitan Opera](#), for instance, is challenged by a \$150 million pandemic-related loss in revenue, about half of the opera’s \$300 million annual budget, which includes some \$200 million in labor costs. As it prepares to reopen, the Metropolitan Opera is seeking pay cuts from about 2,500 union employees, while also working to assure audiences that its indoor venues are safe. The allegations of nine men about years of sexual abuse by longtime Metropolitan conductor James Levine, who was finally dismissed from his job before dying in March, have not helped the storied organization’s image.

Meanwhile, some smaller music-focused groups IP spoke with have been experiencing unexpectedly healthy pandemic-related goodwill from individual

supporters. At the [Capitol Center for the Arts](#) in Concord, New Hampshire, which stages numerous concerts, “I sat at my desk, looking at the calendar of performances that just vanished,” says Katie Collins, director of development. “We started calling our top donors and asking them how they are holding up. That led to some pretty amazing gifts in March and June 2020.” When the fiscal year closed the following month, on July 31, Collins says, the donors’ gifts made the organization’s shortfall about \$25,000 on a fundraising goal of at least \$600,000, a smaller drop than it otherwise would have been.

Many of the Capitol Center’s top donors had extra funds they couldn’t spend on travel and other discretionary items in the pandemic, Collins notes. “We were nervous about making asks, but once we started talking to donors, it became clear they wanted to support us. In a small area like this, donors really know you. They told us they miss us.” Collins and her colleagues started putting donors’ notes and cards on a bulletin board in the fundraising office. The donors’ words, Collins says, “are thoughtful and encouraging; it shows their incredibly deep care about people who work here. It’s not just about the performances.”



“In the past two years, we’ve invested more than \$300,000 each year into other institutions—in some cases, it’s large institutions with bigger operating budgets than ours. We really believe that change needs to be led by many people, and sometimes, it has to be instigated by a place like Sphinx or done in partnership, and we’re happy to do that.”

—Aaron P. Dworkin, founder, Sphinx

An Analysis of Opportunities & Challenges

The music community is in major trouble because of the COVID-19 shutdown. Opera companies and orchestras enjoy a semblance of financial security, but still need to confront rising labor costs, shrinking earned revenues, an aging audience base, and uncertainty around the resumption of in-person performances. Smaller organizations face similar challenges without the security of large endowments and deep-pocketed donors.

Beyond the main priorities of ensuring the sector's survival and advancing equity and inclusion, respondents encouraged funders to help organizations expand the audience base, build stronger ties with community and non-arts partners, engage younger donors, and remedy regional funding inequities.

Venues may reopen in the fall of 2021, but leaders worry that audiences have developed new habits during the pandemic and may be reluctant to attend in-person events due to lingering health and safety concerns. As a result, funders are exploring ways to help all music organizations expand their audience bases in a post-pandemic world.

Wallace Foundation arts programs director Bahia Ramos told IP that the foundation's audience participation work is focused on providing "knowledge and information in the near term while looking at what's happening on the demand side" through [Culture Track](#), a national research and strategy initiative to support the cultural sector and help strengthen communities during and after the COVID-19 crisis.

South Arts' Schustak told IP that the organization's engagement and inclusion work "includes a breadth of concepts, such as race, gender, queerness, the rural/urban divide." Programs such as Jazz Road are "reflective of the Black communities that gave birth to this quintessentially American art form" while its "In These Mountains" initiative "preserves and perpetuates the arts and culture of Central Appalachia through fellowships, mentorship, arts education, and documentation."

OPERA America's Scorca said that opera companies "should think about not producing opera just for opera's sake—although it's important—but that opera can be a very popular instrument for strengthening the civic fabric of cities and communities." OPERA America's Civic Practice grants look to spark more meaningful collaborations by helping member companies build what Scorca calls "pre-project relationships" with community organizations that have an equal stake in decision making, promotion and design from the outset.

Performing arts grantmakers can also remain relevant in a post-COVID world by embracing "intersectionality," an integrated approach where programming acknowledges overlapping identities and may address social issues like poverty, PTSD and hunger.

"The arts cannot and do not exist in a vacuum, but speak loudly to who we are as a society," said South Arts' Schustak. Funds and programming that support cross-sector collaborations between the arts and other areas of society (education, policy, STEM,

healthcare, etc), not just those that can be enabled by strategic investments from arts-centered philanthropies but also by philanthropic dollars from outside the arts, are vital.”

Rick Luftglass, executive director of the Laurie M. Tisch Illumination Fund’s Arts in Health Initiative, told Inside Philanthropy that “more funders have been expressing interest in this intersection, so we think that’s going to change.” Grantmakers in the Arts’ website tracks [ongoing collaborations](#) between arts and health funders.

Funders are also exploring intersectionality as it applies to an arts education field in which more than 1.3 million elementary school students across the country lacked access to a music class before the pandemic, according to the Children’s Music Workshop.

“Every school would provide young people with an opportunity to learn, perform and create music; unfortunately, that isn’t the case, especially in low-income and historically marginalized communities,” said Miami-based philanthropist Daniel Lewis, whose Lewis Prize for Music

provides grants to creative youth development (CYD) organizations that serve students’ food, transportation, mental health and academic needs.

Lewis Prize CEO Dolouge Smith told IP that the CYD field “is clearly the musical area with the most potential” to achieve equitable systems change. “Its merging of self-expression, social supports and intergenerational mentorship makes it perfect for collaboration across the education, artistic and social service sectors.”

Other examples of funders providing support to music education organizations include the Paul M. Angela Family Foundation (El Sistema USA), the Eisner Foundation (Los Angeles Philharmonic’s Learning and Community initiatives), and the Andrew W. Mellon Foundation, which has given about \$18 million since 2015 to support a series of programs across the country for sixth through 12th-grade music students from traditionally underrepresented backgrounds.

With millennials and Generation Xers poised to inherit billions from their baby boomer parents, grantmakers and coalitions like M+D’s Arts Funders Forum, which launched in 2018 with support from the Knight Foundation, are looking to unlock more arts giving from these demographics. “The social justice issue is huge,” AFF founder Sean McManus told IP. “It’s one thing to experience traditional works of art, but what are institutions doing to drive social change?”

“Making the case as to why we need the arts needs to include not just the traditional ‘you get to come to this fancy concert,’ pitch” to younger donors, Sphinx’s Dworkin said, “but also about viewing yourself as a fabric of society and articulating how the arts are this very necessary and singular mode



Lilly Endowment Inc.
A Private Philanthropic Foundation

“[The Lilly Endowment] has a long history of grantmaking to support arts and cultural organizations of all types, including music organizations. We believe that these organizations add joy and meaning to our lives and play an important role in building and strengthening communities. We view this sector holistically and do not have a separate grantmaking strategy for music organizations.”

—Judy Cebula, communications director, Lilly Endowment

of expression, and how expression is integral to human development, creativity and problem-solving.”

Grantmakers are also tackling regional funding inequities. According to a 2020 report by Freedom Maps, a person living in the American South in 2017 received only **\$4.21 in arts and culture funding** per person from private philanthropy compared to the national average of **\$8.60** per person. “The South is unique in arts philanthropy, as we lack the amount of major regional and national foundations that other regions are able to pull support from, particularly the Southern areas located outside of key cities,” South Arts’ Schustak told IP. “Significant portions of our region, especially those in the vast rural and otherwise underserved areas, are ripe with opportunities for growth and investment.”

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“Since this is a capitalist nation, it is important that civic, corporate and philanthropic leaders recognize the power, importance and value of the arts. (Socialist and communist countries provide state support). If we aim to compete with the best in the world, the private business sector should step up where public support is lacking.”

—Advancement professional, San Antonio, Texas

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¹Based on available grantmaker data from Candid. Excludes federal funding and funding by higher education institutions

²Based on available grant recipient data from Candid. Excludes government organizations.

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