



How to Keep All Those Donors Your Museum Worked So Hard to Get

Welcome!

The webinar will begin at 10:00 a.m. CT.

While you wait:

1. Download PDF of the webinar slides under the "Handouts" tab of your control bar.
2. Confirm that your speakers are turned on and your audio is working by doing a sound check in the "Audio" tab of the control bar. Having problems? Exit and restart the webinar or switch to "phone call" for a phone number and access code to hear the audio through your telephone.

Viewpoints shared and information developed and distributed by other organizations and presenters do not necessarily reflect the views of the Texas Historical Commission and its staff.

The Museum Services Program provides support, resources, and training to museums in Texas.

- Consultations
- Webinars and workshops
- Resources

www.thc.texas.gov/museum-services

On our webpage:

- Webinars
- Workshops
- Grants and Fundraising
- Helpful Resources
- Connect and Learn

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Upcoming Free Webinars

www.thc.texas.gov/museumwebinars

- Collaboration Between Museums and Indigenous Partners
 - Thursday, June 22, 10:00 a.m. CT
- Tribal Collaboration, Sovereignty, and Methodology: An Ndee (Apache) Perspective
 - Thursday, June 29, 2:00 p.m. CT
- Active Shooter Preparedness
 - Wednesday, July 12, 10:00 a.m. CT

Upcoming Free Webinars from Other Orgs

www.thc.texas.gov/museumconnections

- Transformative Listening in Museums, May 23, 3:00 p.m. CT, MAP
- Inclusive Leadership: An Alternative to Traditional DEI, May 24, 3:00 p.m. CT, MAP
- How to Launch a Virtual Museum, May 25, 11:00 a.m. CT, AIM
- What Can Dew Point Do for You?, May 31, 11:00 a.m. CT, CCAHA
- Rebuilding the Workforce in the Museum: The Leaders' Perspective, May 31, 12:00 p.m. CT, MuseumExpert.org
- How to Get Your Board to Fundraise, May 31, 12:00 p.m. CT, Productive Fundraising
- Lessons Learned from the Route 91 Harvest Music Festival Shooting, June 1, 1:00 p.m. CT, Lyrasis
- Collections Management Policy Toolkit, June 7, 12:00 p.m. Ct, CCC
- NAGPRA Needs Assessment and Strategic Planning, Part 1, June 21, 2:00 p.m. CT, NEMA
- What's Eating You? Integrated Pest Management in Natural History and Science Museums, June 22, 11:00 a.m. CT, NEMA
- Optimizing Your Nonprofit's Events to Fuel Fundraising Growth, June 28, 12:00 p.m. CT, Productive Fundraising
- NAGPRA Needs Assessment and Strategic Planning, Part 2, June 28, 2:00 p.m. CT, NEMA

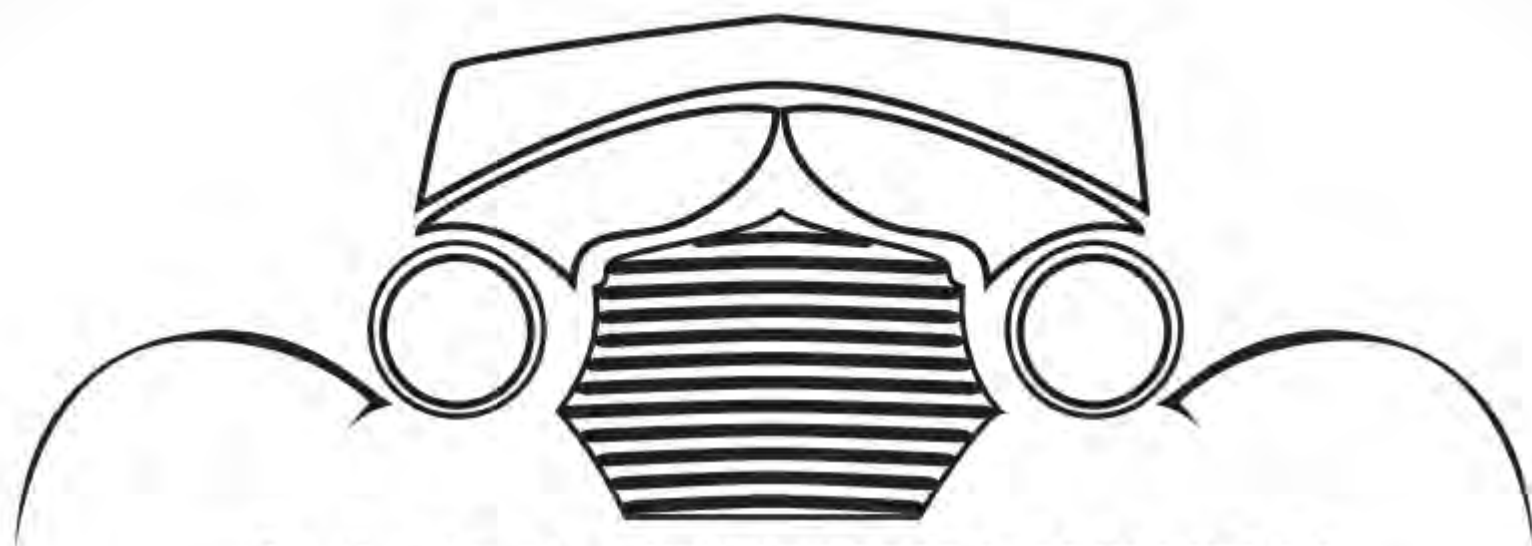
Chad Barger, CFRE, CNP



How to Keep All Those Donors Your Museum Worked So Hard to Get

PRESENTED BY CHAD BARGER, CFRE, CNP





AACA MUSEUM

A World Class Automotive Experience

CARS • BUSES • MOTORCYCLES • & MORE











Why'd it happen? Because
we showed we cared.

Of course we care, but too
often we get so caught up in
doing ALL THE THINGS that
we forget to show we care.

TODAY'S GAME PLAN

- 1 WHY DONOR RETENTION MATTERS**
- 2 8 PROVEN STRATEGIES TO BOOST DONOR RETENTION**
(with LOTS of samples that you can adapt for your nonprofit)
- 3 THE BEST WAY TO GET STARTED**
- 4 ADDITIONAL RESOURCES**
- 5 QUESTIONS & COMMENTS**

But first ... who is this guy?

And why does he think he knows what he's talking about?









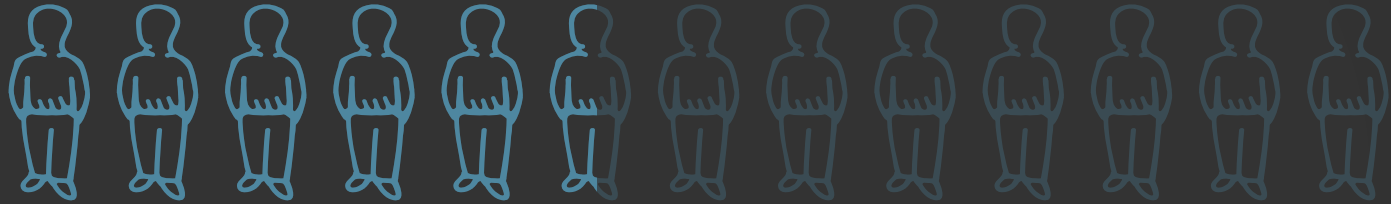
SLIDES + FREE RESOURCES + RECORDING

DOWNLOAD AT PRODUCTIVEFUNDRAISING.COM/RESOURCES



Why Donor Retention Matters

43%



Average Donor Retention Rate (Fundraising Effectiveness Project, 2021)

29%



Average FIRST TIME Donor Retention Rate (Fundraising Effectiveness Project, 2021)







donors who care. a lot.

donors who
care. a little.

donors who
don't care. yet.



“Trust that money follows the love.”

JOHN LEPP, AGENTS OF GOOD

“What's more expensive than thanking donors? Acquiring them.”

JEN LOVE, AGENTS OF GOOD

“On average, acquisition is 7 times more expensive than retention.”

LYNNE WESTER, DRG GROUP

THE KEY TO FUNDRAISING SUCCESS

**Spend at least as much
time on retention as
you do on acquisition.**



8 Proven Strategies to Boost Donor Retention

(with LOTS of samples that you can adapt for your nonprofit)



IDENTIFY YOUR RETAINABLE DONORS

TRANSACTIONAL

VS.

RELATIONAL DONORS













2

**ENSURE YOUR COMMUNICATIONS TO DONORS
ARE DONOR-CENTRIC**

LET'S LOOK AT
2 EXAMPLES ...



The Arc of Cumberland
& Perry Counties

CELEBRATING 65 YEARS!

Chatter

A CPARC Newsletter

December 2018



Home brewers and guests had a wonderful time at the 2018 Spirits of the Community Home Brew Festival & Competition!

HOME BREW EVENT SHOWCASES FUNDRAISING 'SPIRIT'

Thanks to our supportive community, generous sponsors, talented home brewers, and awesome volunteers, the 2018 Spirits of the Community Home Brew Festival & Competition was a huge success! The event, which took place October 13 at the S. Wilson Pollock Center for Industrial Training (PCIT), raised \$15,975 for the CPARC Foundation, which supports the programs and services of CPARC.



About 30 home brewers went head-

(Berry White Kettle Fruit), **Josh Yeckley** (Chocolate Chipotle Stout), and **Jacob Hornick** (Midnight Resurrection). They also received a medal and a cash prize.

When guests were not sampling brews, they enjoyed delicious food from Karns Quality Foods that was prepared by The Sassy Gourmet, PCIT's catering services that employs people with and without disabilities. They also bid on their favorite items in a silent auction and enjoyed music. New this year was the opportunity for mobile giving. Guests could use their cell phones to make



The Arc of Cumberland
& Perry Counties

Chatter

Your CPARC Newsletter

Winter 2019

You put the smile on Bryan's face

"I like to fly," Bryan says, "and I like to laugh."

Bryan gracefully steers his way through life. Nothing holds him back.

Because of your support, "CPARC helps us grow and grow and grow, like a flower," Bryan says.

One of his favorite things to do is ride roller coasters. Joy, a person who helps Bryan, often joins him on these adventures. "We share a love of roller coasters," she laughs.

Every summer, Bryan and Joy laugh and scream wildly as they hurtle down the rails and whip around corners on coasters at Hershey Park. You make moments like this special for people with disabilities every day.

Unfortunately, people in wheelchairs - like Bryan - often can't enjoy every ride at amusement parks. Bryan was thrilled to ride



\$3,000 DONATION

from a \$100 annual donor

YOU / YOUR



“How often do we need to send donor-centric communications to our donors?”



PENELOPE BURK

DONOR CENTERED FUNDRAISING

How to hold on to your donors
and raise much more money

————— Second Edition —————



“Every
communication
you send to a donor
is interrupting
something they're
already doing.
Make it count.”

PENELOPE BURK



3

THANK PROMPTLY & PERSONALLY

THE CRAZY SPEEDY
PERSONAL THANK YOU

SUBJECT: Thanks ...

Thank you so much for your recent donation to
(organization)!

You will receive a formal gift acknowledgment (for tax
purposes) in the mail, but I wanted to personally reach out
and thank you as soon as possible.

Thank you again for your generous support of (mission)!

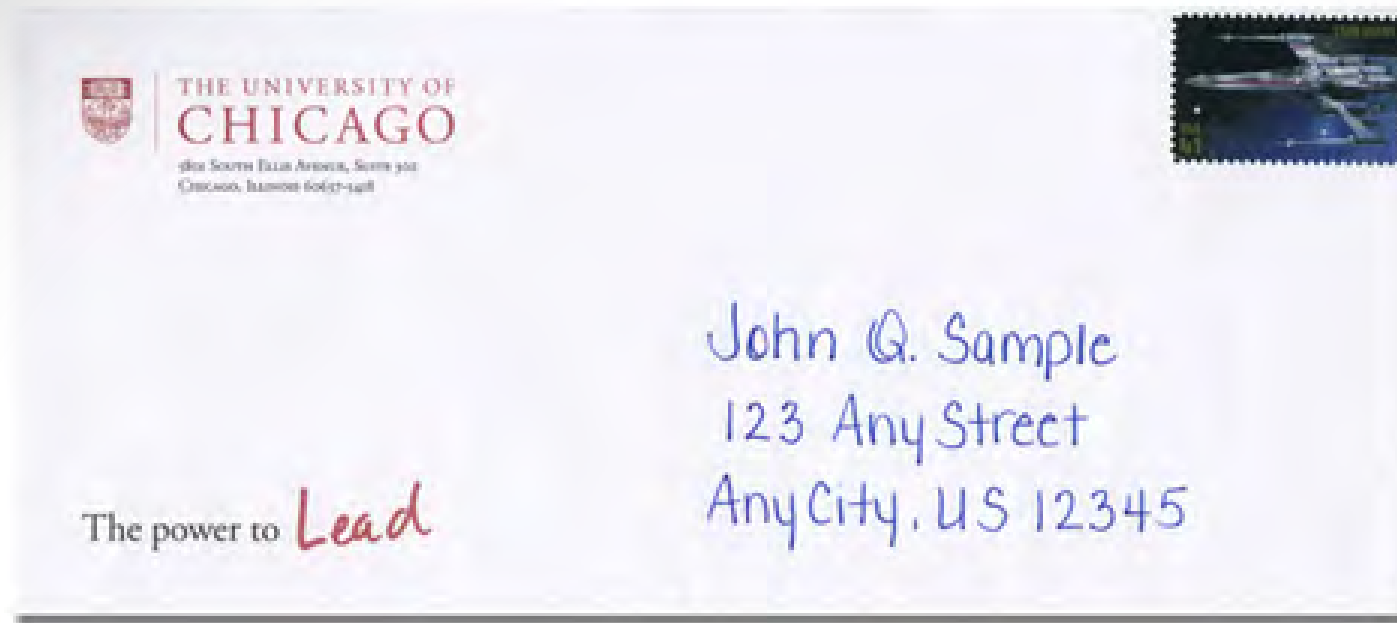
(your first name)

(email signature)

THE (FORMAL) GIFT ACKNOWLEDGMENT

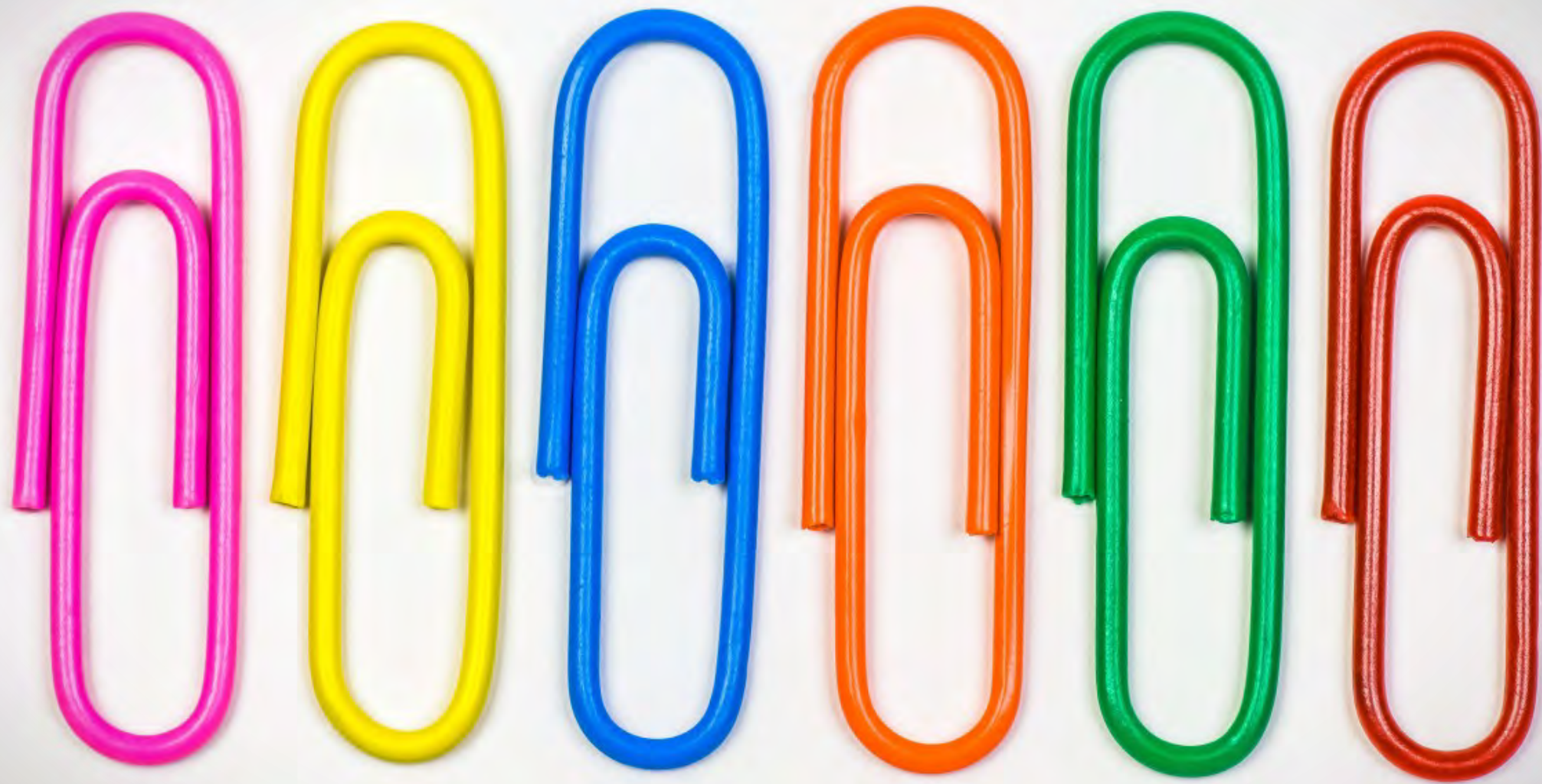


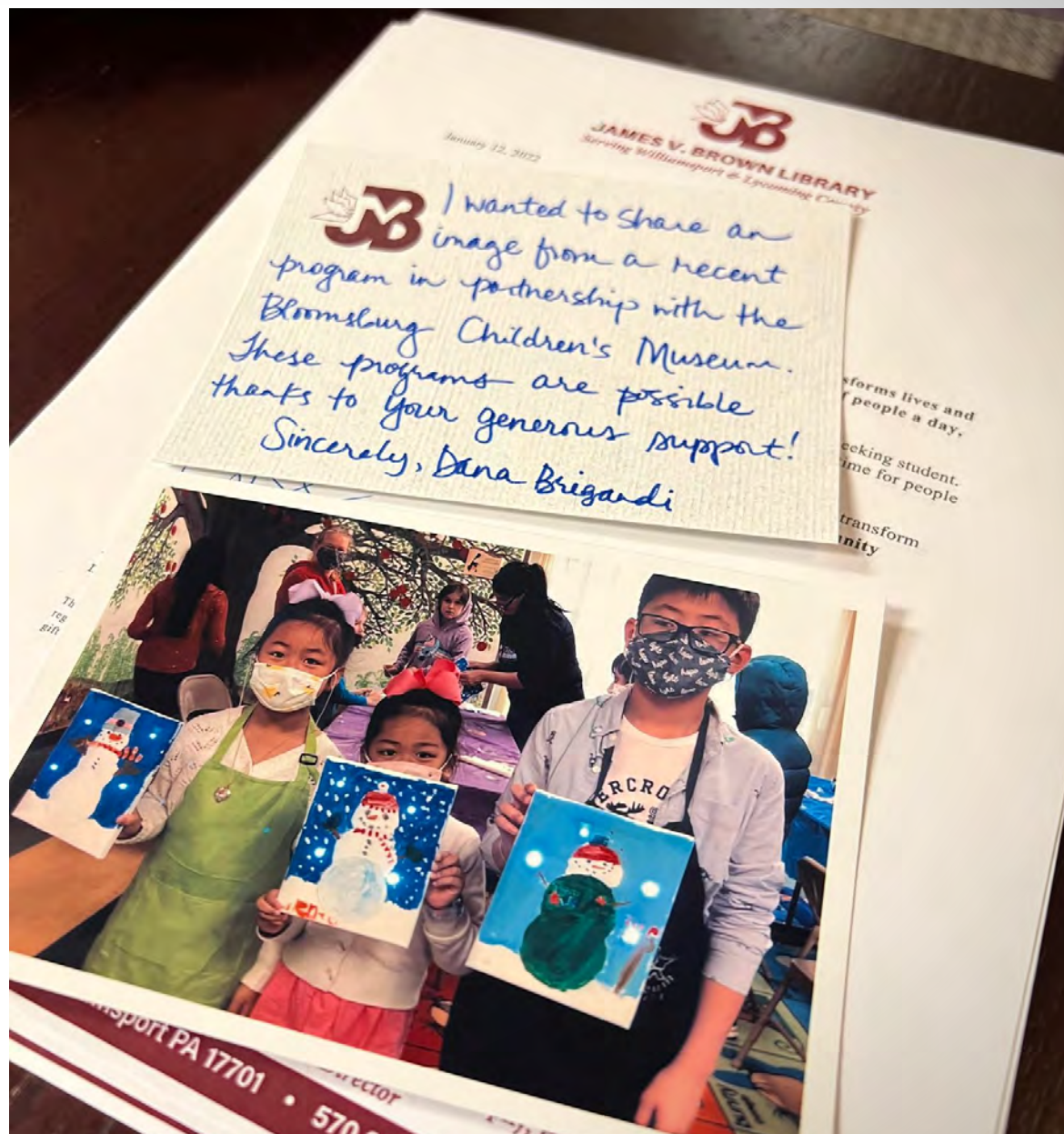
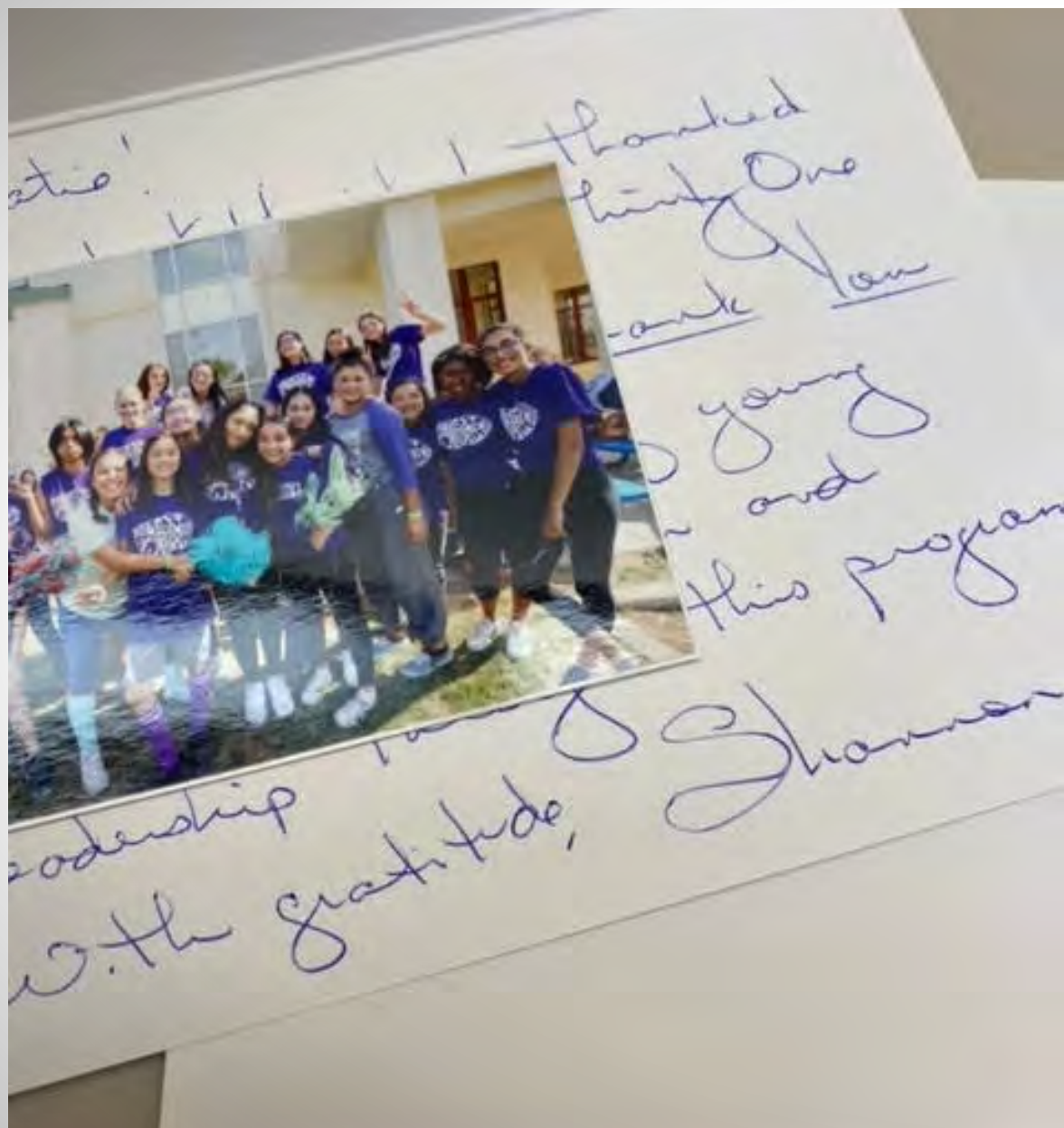
Dear Sir/Madam



Thank you again for your
ongoing support!







Dear Lynne,

BECAUSE OF YOU...

...countless children and their families have a reason to be thankful. Because of your recurring support, patients at Children's Hospital Colorado can celebrate health and healing and look forward to 2020 with hope and strength, knowing that donors like you are there to support them every step of the way.

As the only comprehensive nonprofit pediatric hospital in the region, Children's Colorado provides world-class, family-centered health care to kids in Colorado and across the nation. Your generosity fuels our ability to treat every child who needs us – more than 230,000 patients every year!

We are grateful for the impact you made as a monthly donor in 2019. You donated 10 gifts totaling [REDACTED]. Thank you for your ongoing support of Children's Colorado and for creating brighter futures for our patients and their families.

With gratitude,



Jennifer Roe Darling
President and CEO
Children's Hospital Colorado Foundation

NOTE: This is a summary of your 2019 donations; it is not a receipt for tax purposes. Please contact gshelp@childrenscoloradofoundation.org or [720-777-1781](tel:720-777-1781) if you have questions about this statement.

KATALLASSO *kāt-al-las'-sō*

return to favour with, be reconciled

to one to receive one into favour

to exchange, as coins for others

of equal value—to reconcile

those who are at variance



“Is personalization really worth our time?”

59% of donors said personalization would increase their donation by up to 10%, while 25% said personalized experiences would raise their donation amount by up to 25% more.

Accenture Consulting, 2017



4

THANK WHEN IT'S UNEXPECTED,
USING MULTIPLE CHANNELS



Dear Chad,

Thank you for your generous gift of clean water. Your partnership means lives are saved through hygiene education, sanitation, access to clean water, and experiencing the hope of the gospel. We deeply appreciate your gift.

Gratefully,
Maggie





@fundraiserchad's

3 Minute / 3 Sentence Thank You Note Formula

1

**THANK THEM FOR
WHAT THEY DID**

2

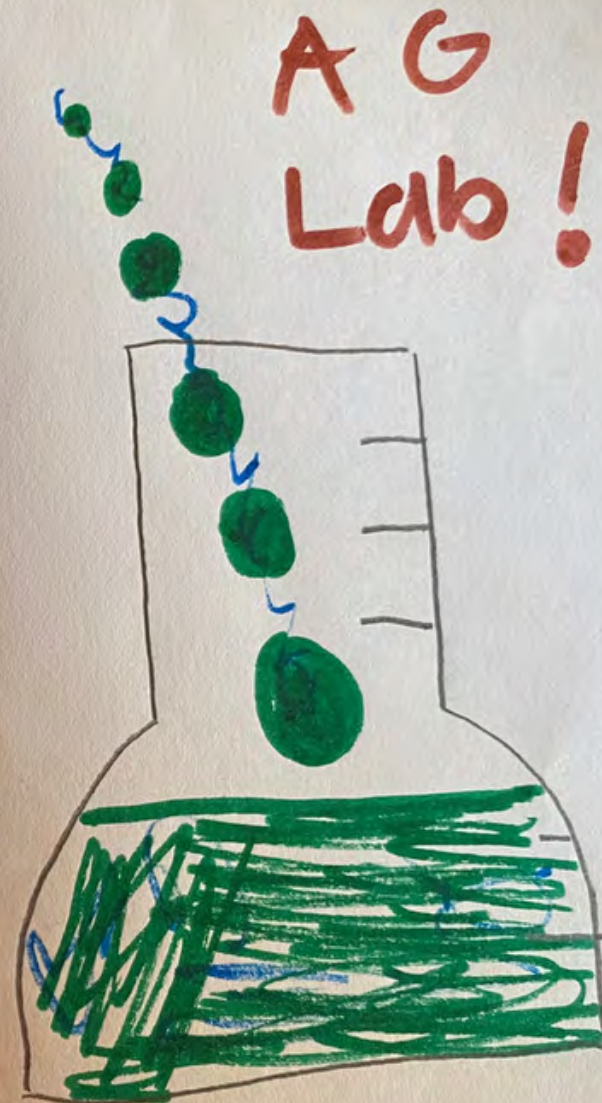
**STATE THE IMPACT OF
THAT ON THE
ORGANIZATION /
COMMUNITY**

3

**SAY WHAT YOU
APPRECIATE ABOUT
THEM**

Thank You
for letting us
do all the
fun labs
thank you
sponsors!

Joke: Think
like a proton
they are positive





INSTANT DONOR RETENTION BUDGET

Once per year, ask each of your board members to donate a roll of stamps. Now you have (# of board members * 100) opportunities to send donor love.





Magee Rehab Hospital Foundation – Jefferson Health - Philadelphia, PA

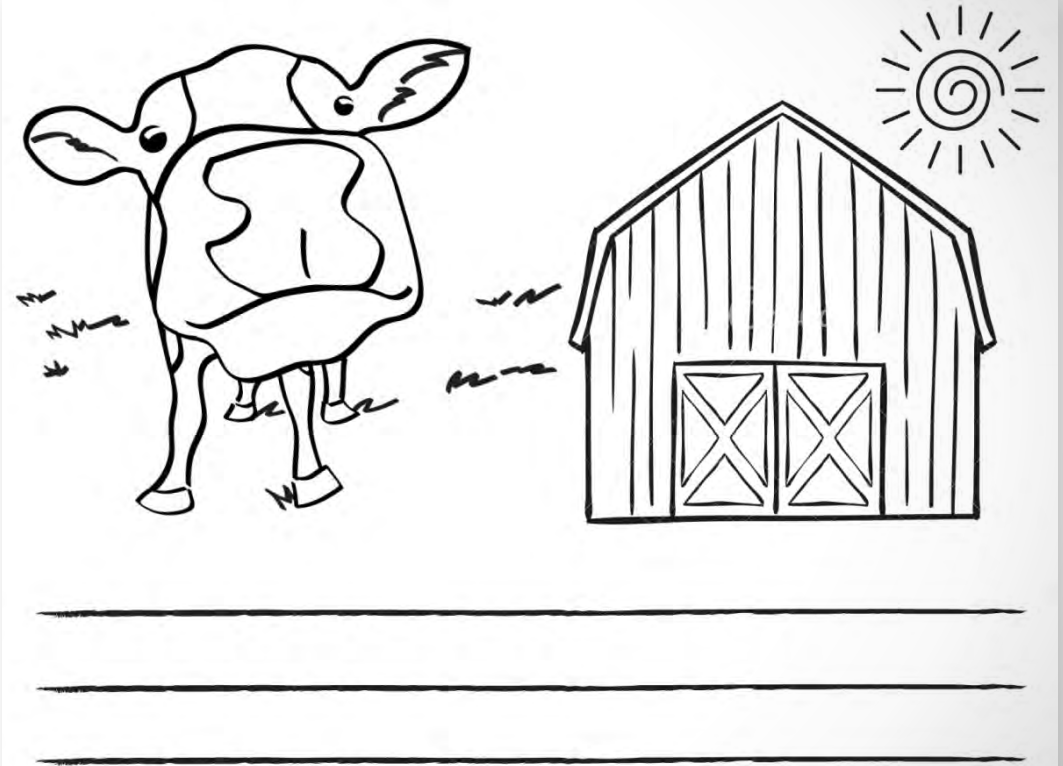
Because of you,
214,000+ STUDENTS
are learning about dairy farming.



DairyExcellence
FOUNDATION

Thank
you!

centerfordairyexcellence.org







Because of you,
283,645
*residents of the capital
region had an*

arts
experience

last year.
*Thank you for your
ongoing support!*



Cultural Enrichment Fund
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Harrisburg, PA 17108
Carrier: leave if no response

NONPROFIT ORG.
CMM
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PAID
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PERMIT NO. 1439

2*2*****5 DIGIT 17112

Harrisburg, PA 17112-9631

TED or CMM?

We offer two types of **SHAPED** mail to help you get the most impact for your marketing dollar. Here are some of the features of each, but call us to get more info!

TED (Trail Edge Die-cut)

- Stands out in the mailbox!
- Postage is the SAME as your standard non-profit postcard rate.

CMM (Customized Market Mail)

- Custom, unique, fully die cut piece that is truly unique to your organization.
- Your prospects or clients will keep these pieces and reply in higher numbers than ever before.
- Postage is a bit higher than a regular postcard but is still extremely affordable. Send us your mailing list and we can provide EXACT postage estimates!
- Great for handouts or inserts.

If you don't need mailers we also do "regular" printing as well. Let us help with booklets, flyers, brochures or any other print needs. **LOCATED HERE IN TAMPA!**



Call Jim O'Brien & find out which type of mailer is ideal for your organization!



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2*27***333*****MIXED AADC 3
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MENTION YOU HEARD ABOUT THEM FROM

@

FUNDRAISERCHAD

AND RECEIVE 50% OFF A CUSTOM STEEL RULE

DIE



It's been a fun-filled summer!

Because of your support of New Hope Ministries, kids are having fun in the sun, learning about science and nature, reading books, volunteering in our community, and enjoying nutritious and healthy food.

Next up: Back to school!

You make all this (and more!) possible.

Thanks, Chad!
 ☺ Joel [signature]

**New
HOPE
Ministries** 
 Sharing Christ's love by meeting human needs

New Hope Ministries is a 501(c)(3) nonprofit organization – contributions to which are tax deductible to the fullest extent permitted by law. The official registration and financial information of New Hope Ministries may be obtained from the Pennsylvania Department of State by calling toll free within Pennsylvania, 1-800-732-0999. Registration does not imply endorsement.



projectsomos • Follow

Project Somos Children's Village



projectsomos Last week our monthly supporters had the opportunity to do a live video chat with six of our students! The Somos kids got to practice their English and the donors got to ask questions about their experience here. Thanks to all who participated! We look forward to our next "visit"! #projectsomos #childrensvillage #donors #donorexperience #learning #feedingchildren #educatingchildren #childrensvillage #fincalife



41 likes

2 DAYS AGO

Add a comment...

Post







5

MAKE STRATEGIC THANK YOU CALLS

CALLING TO THANK DONORS
GENERATED A 56% INCREASE IN
FIRST-YEAR RETENTION AND A 72%
INCREASE IN REVENUES.

SOURCE: ROGER CRAVER

Who you gonna call?



Start with these groups ...



**FIRST TIME DONORS OF
\$100+**



**REPEAT DONORS OF
\$500+**



MONTHLY DONORS

BEHAVIOR (NOT JUST DOLLAR) TRIGGERED

WHO IS BEST SUITED TO MAKE THESE
CALLS?

“Donors who receive a prompt, personal thank you from a board member will usually give up to 39% more than the other group.”

Penelope Burk (2020)

Thank You Call Script

Hi [first name of donor], this is [your name] with [name of organization].

I'm calling today to thank you for your recent donation. It means so much and we wanted to tell you personally how grateful we are.

[pause]

You will receive a formal gift acknowledgment (for tax purposes) in the mail, but I wanted to personally reach out and thank you as soon as possible.

Thank you again for your generous support of [insert mission of organization, e.g. "education"]

If you have just a few seconds, I'd love to know what prompted your gift?

[pause]

Thank you for taking the time to speak with me today. Have a wonderful day!



REPORT ON IMPACT

“85% of donors say they don't receive information on gift outcomes and 84% say they would give more if charities showed them results.”

Penelope Burk (2020)

THE IMPACT LETTER

Sample Impact Letter

Dear Veronica -

Thank you for your continued generosity. Because of you [insert impact].

It has been six months since you made a generous commitment to [organization]. Today, I am simply writing to let you know that your dollars have been put to use as you intended.

With your help, [organization] has reached the following milestones over the last six months:

- [milestone 1]
- [milestone 2]
- [milestone 3]

[photo of their support in action]

On behalf of the [organization]'s Board of Directors, I would like to once again express our sincere appreciation for your generosity and commitment to [mission]. Please feel free to contact me directly with any questions or concerns.

Sincerely,

“93% of donors say they would definitely or probably give again to a charity that provided a prompt and personal thank you followed by meaningful report on their gift at work.”

NonprofitNetwork.org (2022)

Key Supporter Mailing List

- **PULL A LIST OF AROUND 20 IMPORTANT DONORS AND SUPPORTERS**

- **YOUR EXECUTIVE DIRECTOR SENDS A SIMPLE, TEXT ONLY EMAIL NOW AND THEN TO THIS GROUP, SHARING A PERSONAL UPDATE**

”Just the other day I walking down the hall and stumbled upon something amazing ...”

- **THE GOAL IS TO KEEP THESE KEY SUPPORTERS CLOSE AND MAKE THEM FEEL SPECIAL, LIKE INSIDERS**

- **NO ASKS, BUT MANY ADOPTERS REPORT FREQUENT UNSOLICITED MAJOR GIFTS & A SIGNIFICANT BOOST TO MAJOR DONOR RETENTION**

They treated this way at most of the other organizations they support at a leadership level.

- **MAKE IT A HABIT AND THEN EXPAND IT TO OTHER DONOR GROUPS**

Donors that give less than \$500 never get treated like this ... imagine what that would do!

CREDIT: GAIL PERRY GROUP



“It's our job, and
our joy, to give
our donors the
impact
reporting that
they deserve.”

LYNNE WESTER



DRG GROUP
Your key to fundraising success

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ACKNOWLEDGMENTS
NONPROFITS

APPEALS & SOLICITATIONS
NONPROFITS

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COMMUNICATIONS**
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**SPECIAL OCCASION &
CREATIVE COMMUNICATIONS**
NONPROFITS

EVENT COLLATERAL
NONPROFITS



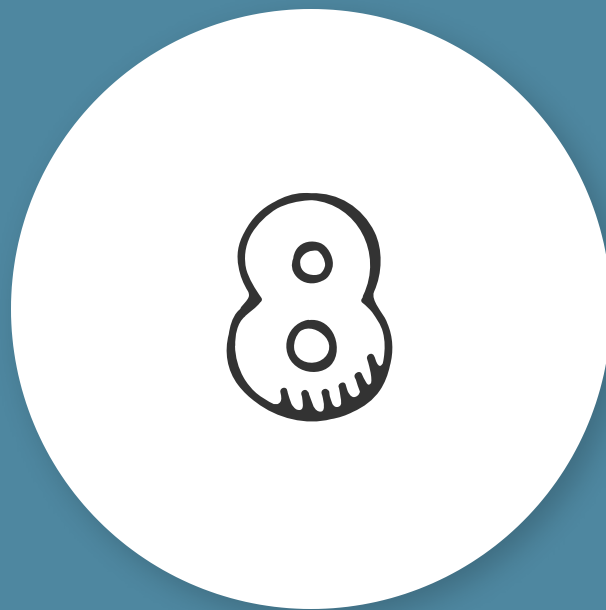
HARNESS THE POWER OF RAW, PERSONAL VIDEO



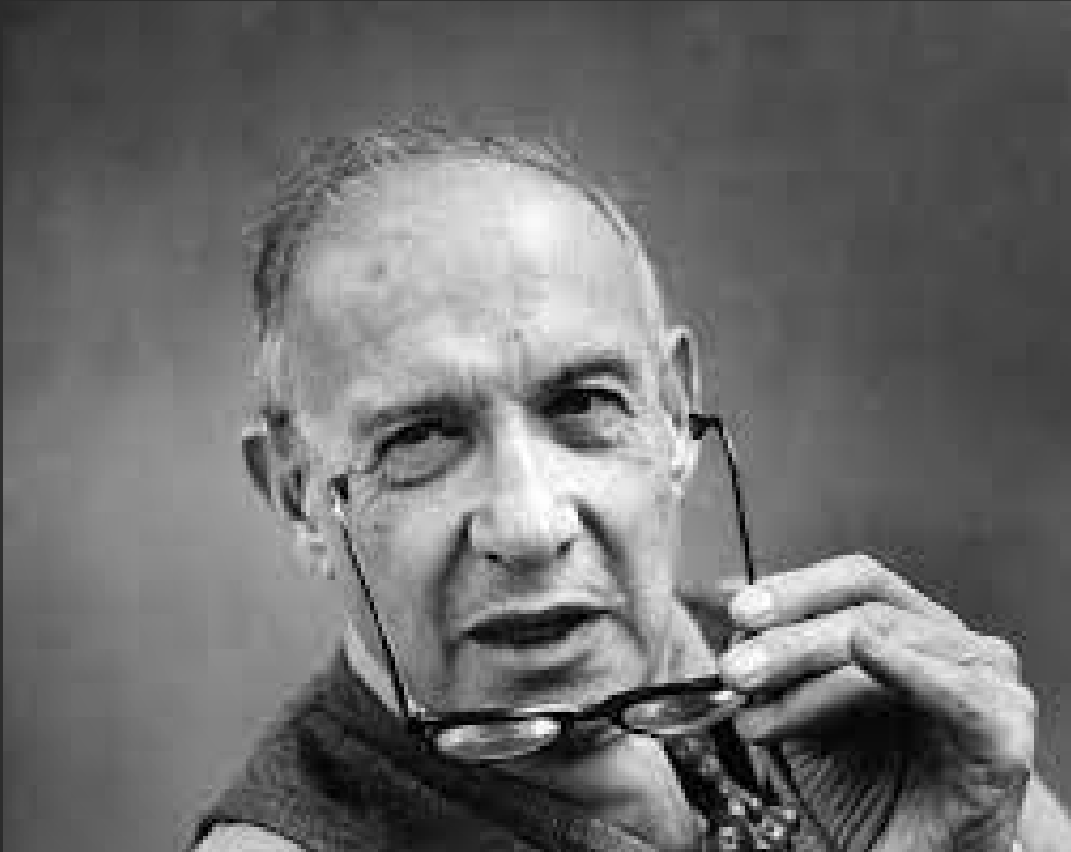


YouTube

@FUNDRAISERCHAD ON THE POWER
OF #VIDEO FOR #STEWARDSHIP



GET TO KNOW YOUR DONORS (IN PERSON)



“What gets
measured
gets
managed.”

PETER DRUCKER



SET A VISIT GOAL



BLOCK TIME ON YOUR CALENDAR FOR DONOR VISITS



BLOCK TIME ON YOUR CALENDAR FOR SCHEDULING DONOR VISITS

A GROWING MOVEMENT ...

“MEANINGFUL ENGAGEMENT” VS. DONOR VISITS



The Best Way to Get Started

Buddy up ... make small online donations to each others' nonprofits & report back on your experience.

[Organization Name] - 2019 Donor Touch Point Calendar

[illegible]

Don't worry about
being SMALL, worry
about being SILENT.



Additional Fundraising Resources

@fundraiserchad




PENELOPE BURK

DONOR CENTERED FUNDRAISING

How to hold on to your donors
and raise much more money

————— Second Edition —————



FREE WEBINAR

How to Get Your Board to Fundraise

@fundraiserchad

5/31 @ 1PM EASTERN

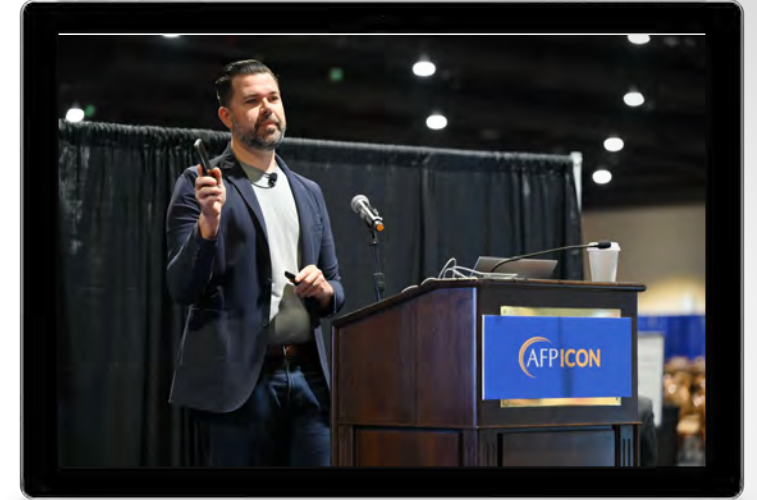
productive
FUNDRAISING
with Chad Barger, CFRE



BOARD & STAFF FUNDRAISING TRAINING



**COACHING FOR FUNDRAISERS &
NONPROFIT EXECUTIVE DIRECTORS**



**ONBOARDING COACHING FOR STAFF NEW
TO FUNDRAISING**



10 WEEK ONLINE FUNDRAISING CERTIFICATE PROGRAM

Donor Retention Toolkit

- Sample donor touch point listing
- Donor touch point calendar (excel file)
- Crazy speedy personal email template & call script
- Gift acknowledgement email sample & letter template
- Thank you call script template
- Donor update call script template
- Impact letter template
- Impact postcard sample
- 4 question post event survey template
- Donor visit request email template
- Donor visit checklist
- Donor visit sample questions
- Donor visit log sample



12+ hours on demand video instruction
+ all editable templates/samples
+ chad answers your ?s & more

Only \$10 per month



Questions & Comments