CREATING RELATIONSHIPS: DONOR AND MEMBER CULTIVATION

Kelsey Scouten Bates, Director of Development
Birmingham Public Library
Birmingham, Alabama

ONE GREAT BIG PEACH PIE
begins with some ripe peaches

Membership

Monetary contributions are the end result of a trusting relationship

Membership: creating a base of ongoing support

- benefits
- communication
- recognition
- engagement
- support
- good feelings

traditional membership program
upper level membership programs
affinity group
subscription program
be creative
How to create a traditional membership program

Create levels that reflect your constituency
Make it easy to give
Provide a benefit (or premium) for each level that reflects your collection or organization
Advertise your program
Tax deductions and recognition
Have a mechanism for keeping gift and donor info (DATABASE)
Communicate, communicate regularly
Keep them engaged year round
Don't forget to ask...

Create levels of giving that reflect your constituency

- **Photographers Level**
  - $50 gift
  - Recognition on website and in annual report

- **Artists Level**
  - $250 gift
  - Above benefits plus a poster of a photo from the collection

- **Collectors Level**
  - $500 gift
  - Above benefits plus an invitation to the annual donor appreciation dinner

Advertise Your Program

- Social media and on website
- Announcement to your email list
- Sign, posters or flyers at the visitor table, in the lobby or in the bookshop
- Direct mail piece to your address list
- Special event admission (or discounted admission)
- Board of directors or committee (especially for upper levels)

Tax Deductions and Recognition (!!!!)

- Thank donors promptly (personally)
- Use standard IRS language in your thank you letter/receipt
- Spell names correctly (and if you're not sure, ask)
- Use a variety of ways to thank donors (website, newsletter or annual report, donor wall)
- Send an end-of-year thank you letter or email
- Call donors who you think would appreciate a special 'touch'

Database Strategy

- Does your organization already have one?
- How much database do you need?
- Who will be entering information?
Communicate and Engage

- Is a newsletter the best (or only) way?
- Do your donors prefer email or snail mail? Online giving or writing a check?
- Get to know your donors by inviting them to something (and give them a benefit at the same time)
- Tell donors when major things happen with special projects
- Ask them what they want

SOME PEACHES RISE TO THE TOP

This is where my peach analogy falls apart

Monetary contributions are the end result of a trusting relationship

Heritage Preservation: Caring for Yesterday’s Treasures – Today
Before you ask for a gift, do the research

- Foundation Center
- Lexis Nexis or Reference USA
- Your local newspaper
- Google
- Peer institutions
- Your board or committee

**Homework Assignment Part One**

Does your institution have a membership program? Do you know its levels/benefits? What are they? If your membership program is non-traditional (no levels or benefits) explain how it works. How does this membership program draw people to your organization?

If you do not work for an organization or your organization currently does not have a membership program, do an internet search on one of your favorite collecting organizations and see if they do. What are the levels and benefits? How successful do you think the program is in drawing people to the organization?

**Homework Assignment Part Two**

- Do an internet search for “donor software comparison” (don’t spend more than 15 or 20 minutes) and answer the following by comparing two donor databases:

  - What are their prices (including set up and monthly fees)?
  - Name one “pro” and one “con” of each, based on reviews, and be specific.
  - Intuitively, which one did you like best (either it would be great for your organization or, if you don’t work for an organization, you like something else about it).