



National Trust *for* Historic Preservation

Preservation
Leadership Forum

How to Kickstart a Fundraising Program as a Staff of One

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75 YEARS

Giving USA 2025 Fundraising Trends

givingusa.org

Findings from 2025 Report (Reporting on 2024)

- Strong stock market resulted in increased giving overall, with individual philanthropy growing by 8% and corporate giving up by 9%
- Foundation asset values are on the rise, total giving surpassing \$100B
- Nine nonprofit subsectors receiving all-time high philanthropy include education; health; arts, culture and humanities; and environment/animals
- Some of the highest growth supports public society benefit orgs
- Foundations are increasing ‘trust-based’ philanthropy approaches
- Individuals want to understand their impact through reporting and metrics
- Younger and new donors seek out specific causes



Current Fundraising Landscape

Fundraising challenges facing historic places:

- Loss of federal funding (NEH, NEA, IMLS)
 - Many non-profits facing budget and staffing cuts, uncertainty, project delays
- Marketing budgets are lean
 - Lagging visitation and visitor engagement
- Insufficient operating endowments
- Overreliance on a few funders
- Lean staff
- Often no professional fundraising staff
- Ongoing capital expenses (cyclical and deferred maintenance)



Overcoming Challenges

- Improve your storytelling
- Invest in growing philanthropy from individuals
- Launch or grow your annual fundraising campaign
- Grow visitation and partnerships



Storytelling, Mission, & Impact

Refresh your case for support!

- Human-centered storytelling will best communicate your mission, vision, goals, and impact
- Your case needs to benefit the community or audience served – it is not about benefitting your organization – your org must be in service to the public in some specific way
- Use a theory of change: how will the visitor/client/project change or transform our current reality? How is that a benefit to your community?
- Active language that is specific and time bound: why should they give to you now? How much funding do you need to do the thing? How does the thing relate to your vision? How will you know if it is working?
- Collect enough data to generate simple metrics that summarize who you reach and how you reach them, or how your project will change
- Invest in digital storytelling: we can use a phone to get digital content on social media, grow your online and IRL following

Storytelling, Mission, & Impact

The Opportunity – What is at stake and why now?

The Vision – Where are we headed?

The Need – What do we need to change?

The Solution – What are we doing to get there?

The Investment – What will it take (financially, strategically)

The Impact – What difference will this make?

The Ask – How can the donor be a part of this?



Photo courtesy Terry Robinson/Flickr

Storytelling, Mission, & Impact

“This project will do more than restore a landmark. It will anchor a vibrant cultural hub, bring new investment to the community, and ensure that our heritage is not lost to future generations.”

“In the last 3 years, we’ve transformed 7 endangered properties into public spaces that have attracted 150,000+ visitors and supported 400 local jobs.”



Making the Case – Vision & Impact

Work on your elevator pitch and train your staff, board, and allies

- **Relevance of your site:** conduct an audience assessment and get feedback
- **Grow community partnerships:** Identify orgs that reach similar audiences and partner; test cross sector partnerships with corporate sponsors or local businesses
- Test your updated case with board, affinity groups, and local foundation partners
- Train your leadership and staff to make the case
- Donors, volunteers, ambassadors, and community leaders need to understand the case for support



Investing in Individuals

Greatest ROI is with major gifts from individuals

- The Five I's
 - Identify, Inform, Inspire, Involve, and they will Invest
- Initiate a major gifts program if you don't have one
 - Start with current leadership and other leaders in your community, network, and make connections
 - Review lists of people in your community and other philanthropists with leadership, trustees, donors
 - Look at giving from Donor Advised Funds (DAFs) – a great wealth indicator, and your mid-level donors for increased engagement
 - Ask for permission to have a conversation about what they care about and what change they want to see in the world; make connections to your impact and ask if they would be willing to consider a gift conversation
 - Stewardship is fundamental – timely follow up with thank you's tied to the impact of their giving is critical for donor satisfaction and gift renewal
 - Ask donors if they would be willing to consider leaving a legacy through a planned gift



Annual Giving is the Foundation

Annual Giving is your pipeline to future major and planned gifts.

- Retention: The most effective & least expensive way to grow your program
 - Monthly giving can be a key driver
 - Focus on your first-year donors
 - Do more than ask
- Acquisition is a necessary investment
 - Train your team and volunteers to ask
 - Provide multiple ways to respond & optimize your online fundraising forms
- Multichannel Communication: It Matters
 - Ask & steward across your communication channels
 - Don't let anyone convince you that you should do everything digitally
- Direct Marketing is a science & an art—you need to understand psychology to do it well
- Don't neglect your mid-level donors: Focusing here can create an outsized impact



Know Your Program Metrics

Measure it to improve it!

- Key Metrics to optimize your time & your budget
 - Retention: How many of last year's donors gave again this year?
 - Coverage: Are you bringing more new donors onto the file than you're losing every year?
 - Average Gift
 - Response Rate: How many people that you sent the request to responded with a gift?
- These numbers and the changes in them will help you know where to focus to improve your results



Resources

Resources to professionalize your fundraising and learn best practices – many have free articles and webinars

- Association of Fundraising Professionals, including local AFP chapters
- Chronicle of Philanthropy
- Council for Advancement and Support of Education, including local CASE chapters
- Guidestar: learn to read 990s
- FreeWill.com - planned giving resources
- Lilly Family School of Philanthropy at Indiana University
- Cultural: Colleen Dilenschneider: Know Your Own Bone
- Site based: American Museum Membership Conference
- Direct Marketing Fundraisers Association *(They have a generous scholarship program)*



Key Research Studies

A non-exhaustive list of research studies commonly referenced & used.

- Giving USA
- Fundraising Effectiveness Project
- CCS Philanthropy Pulse Report
- CCS Philanthropic Landscape
- The Next Generation of Philanthropy
- M+R Benchmarks
- LaPlaca Cohen Culture Track





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