



Heritage Consulting Inc.

Fundraising workshops for Historic Sites

These workshops were developed for historic sites based on our continuing research after the publication of *New Solutions for House Museums: Ensuring the Long Term Preservation of America's Historic Houses* by AltaMira Press in 2007.

Diversify Your Revenue Sources!

All historic sites need regular, predictable income to sustain their organizations and to ensure a viable future. This fast paced workshop which can be either 90 minutes or a half a day explains the Board's role in fundraising and how they delegate responsibilities to committees and staff. We will discuss seven typical sources of revenue for historic sites with special emphasis on three sources of revenue where the site controls both the output and largely the outcome: membership campaigns, sponsorship and fundraising events. We will offer ideas about how to grow these three revenue sources so that they constitute a reliable portion of the annual operating budget. Finally we will briefly review other options for a sustainable organization such as planned giving and endowments. We wrap up top ten tips. Participants will receive an extensive resource packet of materials including the PowerPoint, articles and bibliography. Beginner level

Why Aren't You Asking for Year End Gifts?

According to Charity Navigator, your nonprofit organization could be raising up to 40% of its donations during the last six weeks of the year through an effective Year End Appeal. This workshop will give you all the tools you need to implement a year-end campaign using both social and traditional media to seek support for the general operations of your historic site. This fast-paced session will outline a simple ten-step process to implement a campaign starting in mid-November until December 31. We will discuss how to create a realistic goal, prepare your website for online donations, sort mailing lists, create compelling stories and letters/emails, reinforce the campaign with appropriate PR, schedule and automate thank you letter and being prepared for the last push between Christmas and New Year's Eve. This session can be a 90-minute overview or 3.5 hours in depth discussion. This workshop contains one or two small group exercises (depending on length of session) and participants will receive an extensive resource packet of materials including the PowerPoint, articles, calendar and bibliography. Intermediate/Advanced Level.

We have written extensively about this topic and offered a webinar for the National Main Street Center too.

I Hate Fundraising! Removing Anxiety & Boosting Board Participation

This 90 minute course will help you respond to the age-old statement “I’ll do anything, but just don’t ask me to fundraise!” We will show you how even the most reluctant board (or committee) member can participate in the many tasks toward raising the necessary funds to operate your historic site. We will conduct a mock 20 minute training session that you can replicate at home, about many tasks needed to raise funds. The trick is showing board members that fundraising is not only about making the ASK. Everyone can do his or her small part. In addition, by asking Board and committee members to undertake tasks they will actually carry out, you will get greater participation (and less anxiety) from all involved. Based on the work of Hildy Gottlieb (<http://www.hildygottlieb.org>) this workshop shows you how you can turn even the most reluctant board member into an enthusiastic worker for fundraising efforts. We will supply a nifty template to use for your training session at home. Advanced level

The Ask: Getting Your Board Comfortable with Fundraising

Mounting a capital campaign to raise large sums to save or restore an historic building in town is hard work over many years for any local preservation organization. In this 3.5 hour session you will be introduced to the components of a capital campaign: donor cultivation, the ASK, and stewardship of the donor. We will talk about developing prospect files and the information you will need in those files. You will learn about the five different parts of the Ask, which is the “in person” approach to a potential donor to support your project. We will conclude with a short group exercise: a piece of improvisational theater to show you how to do the different parts of the ASK. This workshop includes two group exercises and a 40 page resource packet of articles, sample files and a bibliography provided on CD. Advanced level.

Creating a Fundraising Plan

As historic sites mature, and committees seek ever-greater revenue sources to support their activities, Board members are insisting on clear, measurable fundraising plans as a means to monitor fundraising across the whole organization. This hour and a half long workshop will introduce you to the component parts of a fundraising plan and how it is integrated into the work planning process. Participants will receive a resource packet of materials including the PowerPoint presentation, several articles, template, sample fundraising calendar and bibliography on CD. Intermediate/Advanced level.

Make More Money from Members

For most historic sites, membership or Annual Gifts are the first form of fundraising undertaken. But for most sites, it remains an undeveloped and unexploited revenue source. This session invites the audience to look carefully at their annual gifts renewal process to maximize revenue from this already committed group of supporters. For those with an admittedly weak annual giving program, we will discuss a model annual gifts campaign to boost revenue and number of donors. For those with an existing membership program, we will highlight seven easy ways to make more money from existing members during the renewal process. Finally the session will focus on revising your membership dues levels and creating giving clubs for donors at higher level to build loyalty and regular support. This session contains one exercise and participants will receive a resource packet of materials including the PowerPoint, articles, renewal calendar and bibliography. Beginner level

Year-Long Sponsorship Packages

Learn why you should gather all of your sponsorship opportunities into one package to solicit sponsors on a yearly basis, rather than one at a time. We will review three examples of year-long sponsorship packages and explain how this simple marketing effort can help you diversify your sponsorship base, gain more revenue from existing sponsors by offering more opportunities, and allow you to fine tune your sponsorship benefits across all events and programs your organization promotes throughout the year. This 90 minute workshop includes one group exercise and a 40 page resource packet of articles, three sample sponsorship packages and a bibliography provided on CD. Intermediate level.

Other workshops for historic sites

Talking about Change at Historic Sites

For the last decade there has been much talk about “repurposing” historic house museums for new uses or users because some just are not financially sustainable. Virtually every national and some state history conferences over the years have had at least one panel session about this topic. It has been seven years since the second Kykuit Summit on Historic Site Stewardship in the 21st Century and the publication of *New Solutions for House Museums*, but what have we actually learned about the process of change to permit repurposing historic sites for new uses or users? In that same period, there have been several state government owners of historic sites have been forced, due to draconian budget cuts, to make choices about which sites to retain in their portfolios. But why has there been so little fundamental change –so little “repurposing”--at nonprofit owned historic house museums? Why is the conversation with board members about change so hard? This 90 minute workshop will talk about this dilemma and offer suggestions about talking about change with your board and staff at your historic site, based on Harvard Business School professor John Kotter’s book *A Sense of Urgency*. We will do a short group

exercise at the end of the workshop to reinforce some of the concepts discussed. We will supply a bibliography and articles for further reading after the workshop. Intermediate level.

What Does It Mean to be “Visitor Ready?": Advice for all Volunteer Historic Sites

This workshop identifies what being “visitor ready” really means for historic sites, so that you can welcome visitors and provide a satisfying visitor experience for those that come. We will highlight our work with five all volunteer historic sites that have undertaken assessments of their heritage tourism potential, and implemented new programs to better interpret their historic site to the public. During our 90 minute workshop we will focus on promoting visitation through web sites and social media, being open more hours and developing a year long events calendar, creating basic visitor brochures, the need for basic public amenities including handicapped restrooms, parking, and improving the interpretive experience. We will provide a CD of materials including sample documents, and a bibliography. Intermediate level.

New Trends in Volunteer Management

We will provide a 60 minute roundup of the most recent and cutting edge information on volunteer management from recognized sources including Energize Inc., the Nonprofit Resource Center, and Idealist. We will do a short group exercise at the end of the workshop to reinforce some of the concepts discussed. This information will be supplied on a CD, along with any sample documents, check lists or other useful data that you can use immediately at your historic site. Intermediate level.

Making Your Statistics Memorable Using Writing, Aural and Visual Means

This half day, hands on workshop works with small teams of four people to undertake a series of fun exercises to use common visitor stats through written, aural and visual means. This workshop requires everyone to bring a laptop with a USB Port, a thumb drive, and their cumulative stats and some good photos of their town on their hard drive. Each group will make a presentation using a historic site’s visitor statistics as an example for each of the three exercises. We will wrap up the workshop with a debriefing and discuss next steps for you to use your visitor statistics to best advantage. We will collect all the presentations made by the groups so you can have a veritable encyclopedia of clever ways to use your visitor statistics through visual, aural and written methods. Intermediate level.

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