

Shifting Priorities: *Member vs. Donor?* *Transactional vs. Philanthropic?*



TheCornellLab 

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 PHS

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BRISCOE
WESTERN ART MUSEUM

Karen Pirinelli

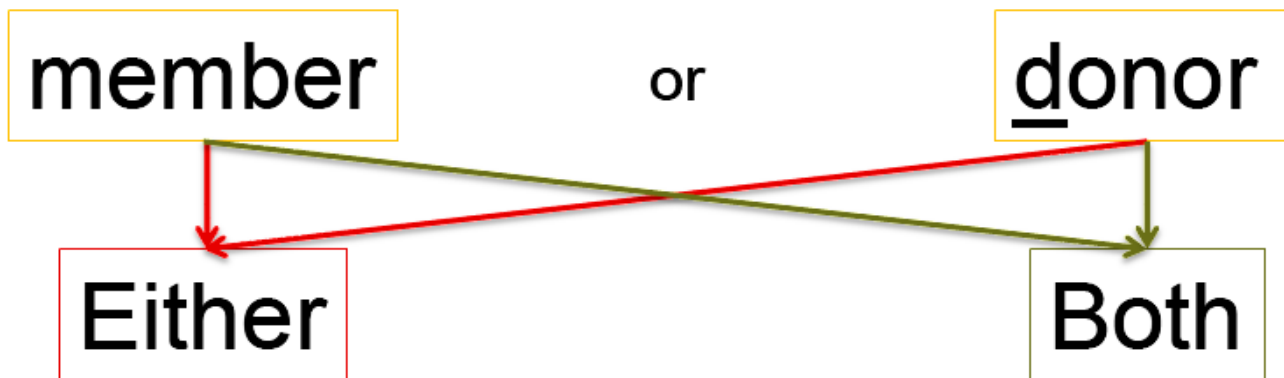


m MEMBERSHIP
MATTERS

Diane Ward

Shifting Priorities: Confusion

Noun Shortage



Donor?
Supporter?

Member-Donor?
Contributor?

Shifting
Priorities

Defining the
Noun Shortage

Maximizing Data

Debunking Myths

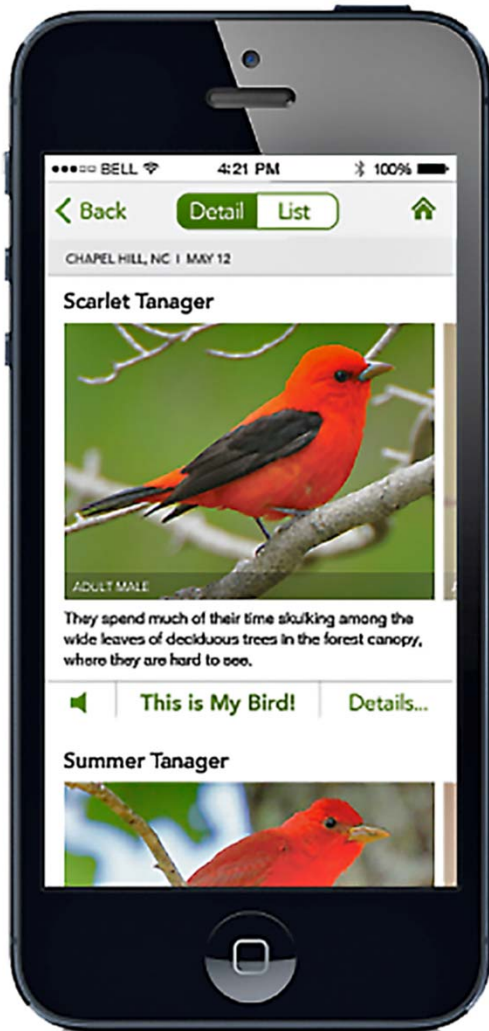
Research (baseline to formal)

Forecasting Models

Managing members and leadership



- Independent research institute of Cornell University
- Functions as national environmental membership-based non-profit
- Research, education, and outreach



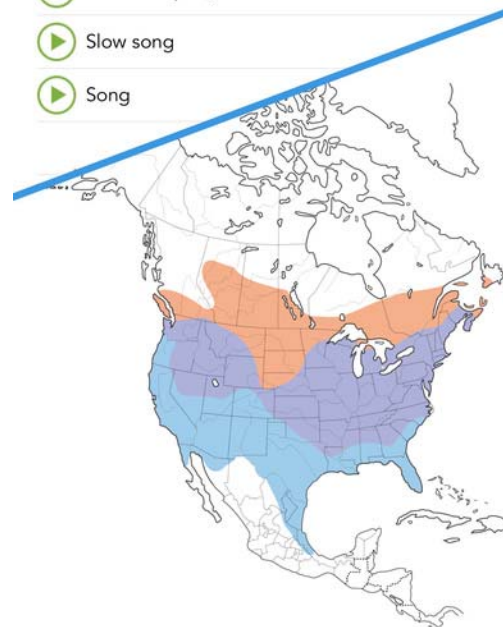
Have a photo?
Merlin can identify that too!

Zoom until your bird fills the box



Listen to sounds, browse range maps and ID tips for 750+ species!

- ▶ Song and calls
- ▶ Potato-chip flight calls
- ▶ Slow song
- ▶ Song



Members

Transactional motivated Benefits

- *Living Bird* magazine
- Premiums
- Benefit Bulletin email
- Travel opportunities
- Sponsorship offers
- Discounts on Lab programs
- Opportunities to participate

Membership Level *	Membership Levels
<input type="radio"/> Supporter Receive <i>Living Bird</i> magazine for \$5 off regular \$44 dues	
<input type="radio"/> Family Option to receive tote bag	
<input type="radio"/> Contributor Option to receive journal and pen	
<input type="radio"/> Guardian Option to receive coffee mug	
<input type="radio"/> Patron Option to receive Cornell Lab blanket	
<input type="radio"/> Sponsor Option to receive Fuertes Blue-winged Teal print	
<input type="radio"/> Golden-wing Society: Benefactor Invitations to exclusive travel tours and events in your area	
<input type="radio"/> Golden-wing Society: Partner All Benefactor benefits, plus free access to all Cornell Lab webinars and tutorials	



Donors

- Philanthropically or cause motivated
- Gives unrestricted funds, not a member

On-the-Spot Giving (Bird Cams)

Campaigns

Try something unusual
We can help you design a gift to support the cause that matters most to you

Creative Gifts

Make a meaningful gift to help us meet our mission
Here are some great ideas for gifts that make a truly meaningful difference to our programs:

- Sponsor a classroom for the Cornell Lab's [BirdSleuth](#) curriculum \$99
- Enable a [worthy student](#) to take the Cornell Lab's [Home Study Course in Bird Biology](#) \$300
- Support an undergraduate's independent research project \$1,500

Please make a donation today

Your support enables us to generate new technologies, tools, and communities so we can protect nature together.

Blackburnian Warbler by Chris Wood

Gift Amount

Online Donation Form

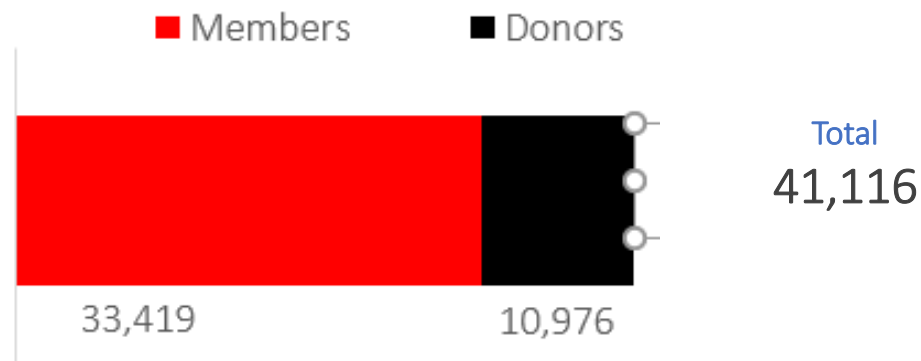
CORNELL LAB FY14 EXPENDITURES

Administration	\$2,587,738	11.20%
Development	\$3,053,138	13.00%
Program Income	\$17,835,693	75.80%

Annual Report

Member vs. Donor

- Pendulum swing: Two Directors of Development
- First: Why do we have members?
- Second (4 years later): Why isn't everyone a member?





- Founded 1827 as a membership organization
- Connects people with horticulture to create beautiful, healthy and sustainable communities
- Engages partners and thousands of city residents in:
 - 1) Civic landscapes, parks and community gardens
 - 2) Restoring major gateways and public landscapes
 - 3) Making city/region vibrant place to live/work





Philadelphia Flower Show

- Producer of Philadelphia Flower Show
- America's largest and longest running indoor horticultural event
- Displays by the world's premier floral and landscape designers
- 245,000 visitors annually
- \$62 M economic impact to region



History of Membership Program Changes

Annual	Rolling Tiered	Per Person	Streamline
All receive FS Preview	General <i>No FS Preview</i>	Associate <i>No FS Preview</i>	Associate <i>No FS Preview</i>
	Upper Level <i>(Flower Show Preview)</i>	Household w/Preview (1) person (2) persons (3) persons (4) persons	Household w/Preview Household (2) Household Plus (4) Online Family Membership <i>(sell 770)</i>
	Direct Mail 100,000	Direct Mail 100,000	Direct Mail 125,000
7,000 memberships	10,200 memberships	13,500 memberships	18,000 memberships
Pre 1998	1999	2005	2010

2015
Associate <i>No FS Preview</i>
Household w/Preview Household (2) Household Plus (4) Family/Duo Paks <i>(sell 11,751)</i>
Direct Mail 145,000
27,000 memberships
2015

2016
Associate <i>No FS Preview</i>
Household w/Preview Household (2) Household Plus (4) Value/Duo Pak <i>(sell 4,204)</i>
Direct Mail 145,000
20,200 memberships
2016

Leadership Shift:
Bodies vs. Bucks

Leadership Shift:
Transactional to Philanthropic



PHS 2016 Transactional to Philanthropic Challenge

Membership Levels	Flower Show Tickets	
• Individual \$55	1	
• Dual \$65	2	
• Family \$85	2 adult/2 child	
• Household \$85	2 (plus preview)	} 58% Annual Revenue
• Household Plus \$105	4 (plus preview)	
• Professional \$150	4 (plus preview)	
• Contributing \$175	4 (plus preview)	
• Sponsoring \$325	5 (plus preview)	
• Sustaining \$625	10 (plus preview)	
• Flower Show Paks	→	70% New Sales



2016 Transactional to Philanthropic Challenge

<u>Membership</u>	<u>Flower Show Tickets</u>
-------------------	----------------------------

Household \$85	2 (plus preview)
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Household Plus \$105	4 (plus preview)
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Flower Show Paks Values

Tickets and Membership

Duo Pak – 2 tickets	\$60
Admission @ \$27	\$54

Value Pak – 4 tickets	\$104
Admission @\$27	\$108



BRISCOE
WESTERN ART MUSEUM



- Preserves the art, history and culture of the American West
- Reflects the region's rich traditions and shared heritage by inspiring and educating through:

1. Engaging exhibitions
2. Educational programs
3. Public events



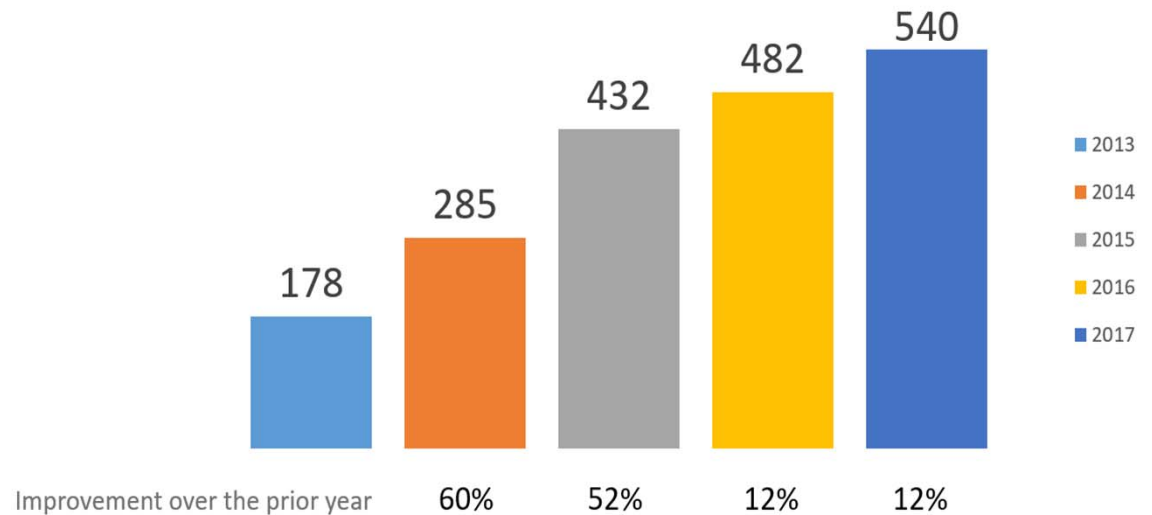
Why Donors vs. Members?

- Split from another western museum in Kerrville, TX
- **Parting of the ways:** relocate to downtown San Antonio – historic building, outdoor gardens, central to famed River Walk
- Legacy to former Governor of Texas
- Donors and living family members enthusiastic of new opportunity
- Provide legacy funding to support the move



Why Donors vs. Members?

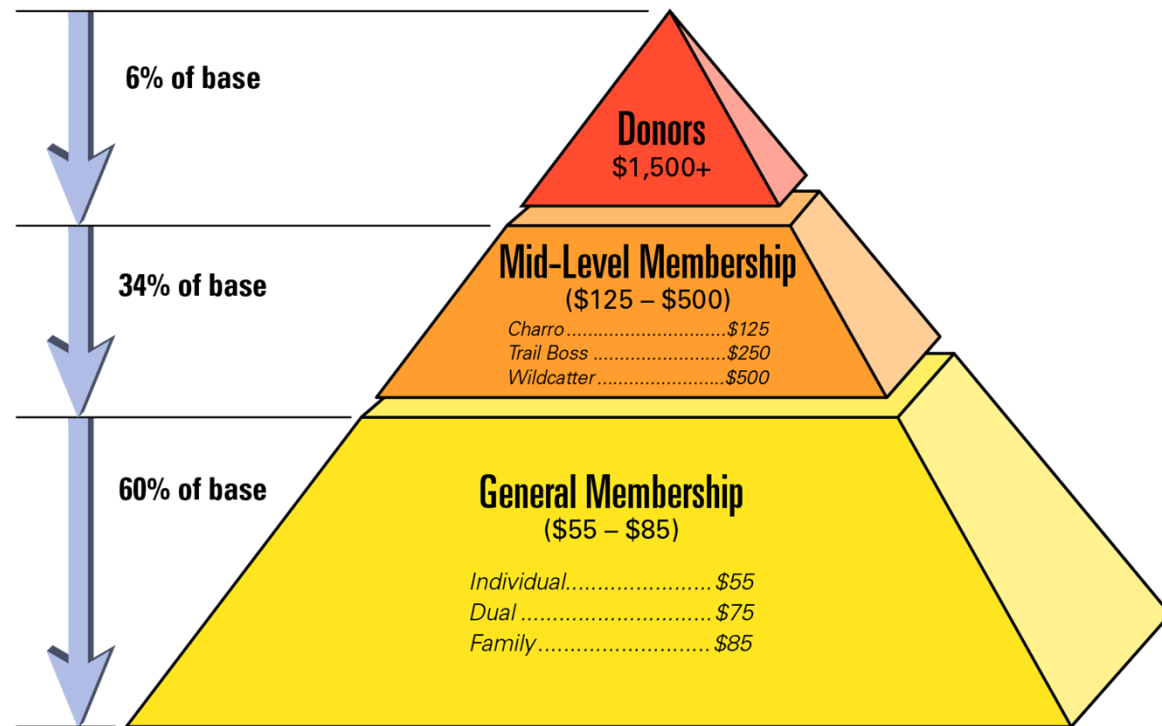
- Membership created by staff - no experience
- No direct mail at grand opening
- Database for ticketing/retail store sales (not membership)
- Opened 2013 - join by word of mouth or connection with leadership staff & volunteers
- Significant growth in early years - but challenging later years
- **Almost 50% of memberships were mid-level or donor members - viewed as positive at the time**





2017 Leadership Change: *More* Members vs. Donors

- Ongoing growth not sustainable via Museum donors and people with close affinity
- Reduce spending and dependence on “legacy funding” for operations
- Let’s **DOUBLE** membership!
- Yikes - limited infrastructure, tools and knowledge





Maximizing Data & Debunking Myths



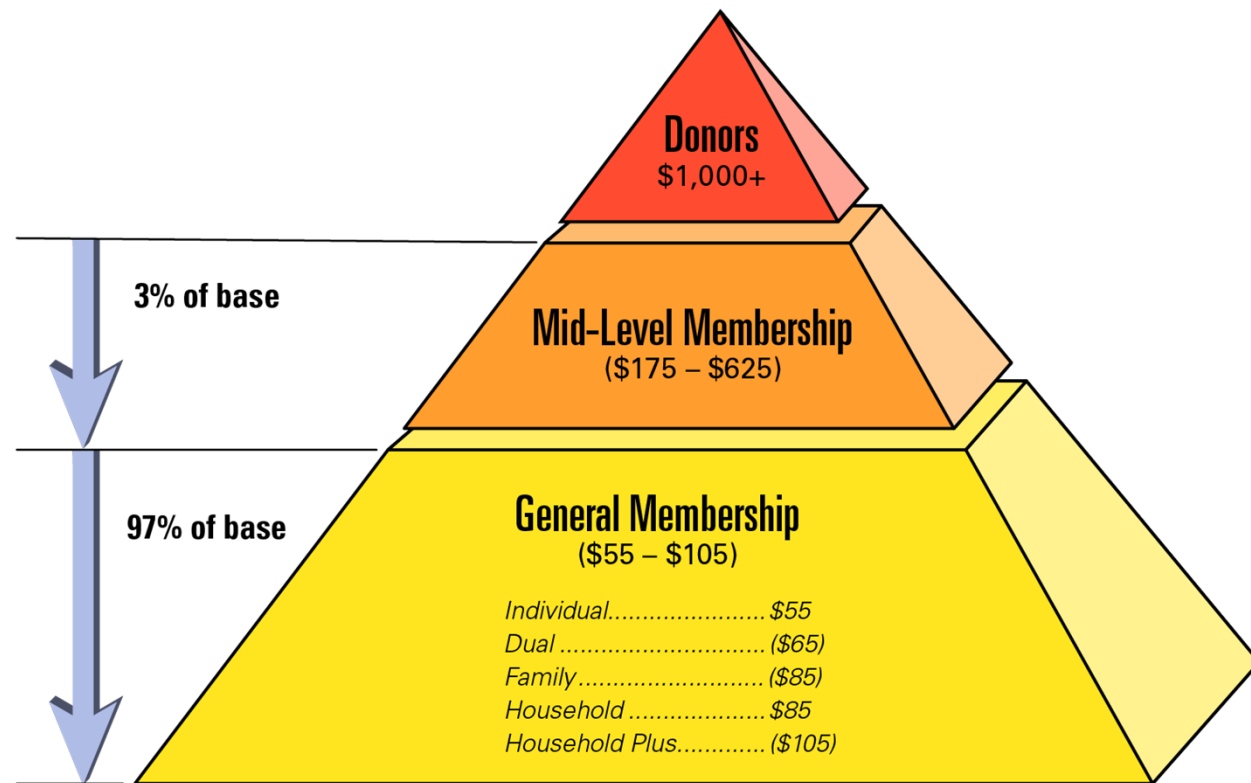
Debunking Myths with Data

- Growth by “bodies” was successful but not sustainable
- Example: 35,000 memberships = issue 100,000+ free Flower Show tickets
- Cost Analysis: Paks expensive to fulfill/ renew at cost of \$24+ each
- Renewal analysis: Paks members are not loyal (**9% renew**)
- Acquisition Profile: **Changing due to online “paks” – growth vulnerable to FS attendance and reduces daily admission ticket sales**

2015 NEW MEMBERS by Channel	Direct Mail	Website	On-site Sales (during the show)	Paks
Renewal Rate (1 year later)	45% - 52%	44% - 50%	28% - 31%	9% - 11%
Number NEW acquired	718	681	2,327	10,071

Maximizing Data to Debunk Myths

- The **Missing MIDDLE**:
3% of the entire base
- 82% renew same level
- Upgrades at lower levels:
Dual to Household or
Household to HH Plus
- **1 upgrade for every 1
downgrade = no real
revenue gain**





Minimal membership information



Create wrap-arounds to support membership in ticketing system



Establish renewal process and procedures for print and email



Build infrastructure for fulfillment and thank you acknowledgments



Hire membership consultant



Managing Growth Expectations

Challenging
without data and
infrastructure!



Debunking Dysfunction

1) On-site sales and Mystery Visitor

- On-site sales conversion rates significantly lower than industry standards (less than 0.05)
- Front line staff not engaged or held responsible to sell memberships
- Membership invisible at the time of arrival





Debunking Disfunction

2) Online communications audit

- Messaging about VISITING, **not joining**
- Competition among between marketing and membership, particularly during events
- Key time to acquire new and recapture former members

COWBOYS AND INDIANS **ANDY**
WARHOL **BILLY**
SCHENCK MYTH OF THE WEST

Briscoe Western Art Museum
May 25 - September 3, 2018

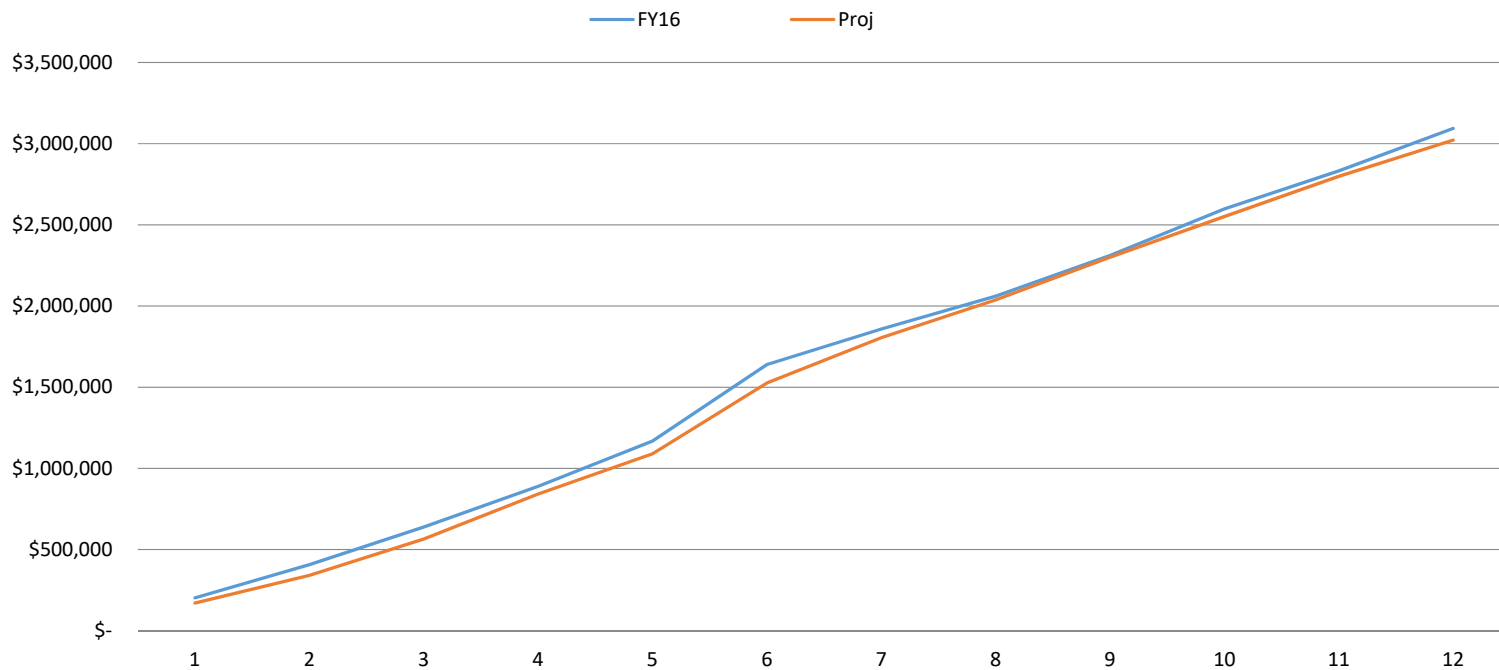
**Two exhibitions-rooted in American Pop Art-pay
tribute to America's collective mythology of the
West.**

FREE WITH MUSEUM ADMISSION

Exhibitions organized by the Briscoe Western Art Museum. Presenting sponsorship generously provided by Wyatt Ranches. Sponsored by the City of San Antonio Department of Arts and Culture. Additional support made possible by Jack and Valerie Guenther, Billy Schenck, and the Host Committee.

Why Members? Data to the Rescue!

Renewal Actual vs. Projections





Membership Research



Transforming from Transactional 2017 Membership Research

GOALS

- Reposition 4 person ticket membership to higher levels and prices – *is this possible?*
- **New goal:** Accommodate leadership's interest in building “**family-based**” audience via membership
- Test new benefit engagement experiences
- Test new levels
- Test price thresholds (no increase 5 years)
- Learn what are the right benefits at the right levels and prices to maximize revenue

Household Plus ~~\$105~~



Family-based Options?





	GENERAL MEMBERSHIP				PHS LEADERSHIP CIRCLE			
	INDIVIDUAL	DUAL	FAMILY	FRIENDS & FAMILY	CONTRIBUTOR	SUPPORTER	SUSTAINER	PATRON
Price 1 Option	\$65	\$90	\$115	\$150	\$250	\$500	\$750	\$1,000
Price 2 Option	\$60	\$80	\$110	\$135	\$250	\$500	\$750	\$1,000
Flower Show Benefits								
Free adult Flower Show tickets (\$35 box office value)	1	2	2	4	6	8	10	12
Free Flower Show tickets for children ages 2-16 (\$17 box office value)			2	2	2	2	2	2
Discounts on additional Flower Show tickets				yes	yes	yes	yes	yes
Free admission and discounts at botanic gardens nationwide				yes	yes	yes	yes	yes

- Test Two Pricing Models – Option 1 and 2. Each includes
- Free Flower Show tickets for adults, children plus guest passes (new)
- Example: Prior **\$105 Household Plus** (4 adults tickets with Flower Show Preview) would require upgrading **\$250 Contributor** for equivalent benefits



	GENERAL MEMBERSHIP				PHS LEADERSHIP CIRCLE			
	INDIVIDUAL	DUAL	FAMILY	FRIENDS & FAMILY	CONTRIBUTOR	SUPPORTER	SUSTAINER	PATRON
	\$60	\$80	\$110	\$135	\$250	\$500	\$750	\$1,000
Behind-the-scenes opportunities, receptions and more								
Members only hands-on gardening workshops	yes	yes	yes	yes	yes	yes	yes	yes
Tickets to tour private gardens in PHS Garden Visits program					2	4	4	4
Leadership Circle garden visits, talks and events					yes	yes	yes	yes
Invitation to Leadership Circle breakfast reception and horticulture talk					yes	yes	yes	yes
Recognition in the PHS Annual Report						yes	yes	yes
Early entry and free plants at the Annual Plant Dividend (September)						yes	yes	yes
Invitation to a Philadelphia Flower Show "Behind-the-Scenes" tour							yes	yes
Invitation to annual Patron's reception with PHS President							yes	yes
Invitation to an exclusive 1827 Society reception								yes

- Test benefit engagement experiences vs. additional Flower Show Tickets
- Keep leadership involved in potential benefits to get buy-in at the start!



Membership Forecast Model

- Success dependent on Household (\$85) & Household Plus (\$105)
- Represent **56% of the base!**
- Forecast model essential
- Understand what worked
- Learn from what backfired

Forecasting Performance	Renewal Revenue Assumptions			
Movement	Renew Same	Upgrade	Downgrade	Avg. Sale
Individual	100%			\$60
Dual	100%			\$85
Family	100%			\$100
Household	n/a	50%	50%	\$110
Household Plus	n/a	50%	50%	\$110
Contributing <i>(same level represents higher price)</i>	100%			\$250
Sponsoring <i>(same level represents higher price)</i>	100%			\$375
Sustaining <i>(same level represents higher price)</i>	100%			\$760

Building Knowledge

Small investment, Big returns



3) Membership Research

- Who members were, motivations to join, benefits used, party size, and interest in new benefits?
- DIY baseline research using Survey Monkey – **21% response rate**
- Benefits important but **philanthropic – driven engagement more essential**
- Desired new benefits – **private tours, reciprocal admission, opportunity to meet artists, small group viewing of collection**
- **1/3 of respondents willing to upgrade for these benefits**
- Rethink levels and benefits and tweak pricing for new collateral

COWBOYS
AND INDIANS **ANDY
WARHOL** **BILLY
SCHENCK** MYTH OF
THE WEST

See it first and free!

Join today to enjoy special savings & Private Exhibition Preview Party

Equipped to Make the Case!



- Results from tracking systems for renewals and on-site sales conversion rates
- Share **weekly and monthly** results with leadership and internal staff
- Work with frontline staff (training, sales tools and incentives)
- Demonstrate need to invest in **first-ever direct mail** campaign to reach new prospects and promote **Warhol, first-ever special exhibit**

Research and Testing

- Large member and donor base to test with confidence!
- Test segments: Group A & B plus Control Group
- Test messaging, premiums, offers, interests, level of ongoing engagement to compare members vs. donors



	MEMBERSHIP			DONATION			
	7 Renewal Reminders	8 Acquisition Mailings	3 Golden Wing Society Mailings	3 Big Day Appeals	3 Year End Appeals	4 Seasonal Appeals	3 Capital Campaign Appeals
	5 Renewal Reminders			8 Big Day Appeals	12 Year End Appeals	Monthly Giving Email Series	
	1 Renewal Reminder					6 Monthly Giving Appeals	1 Capital Campaign Appeal

Research and Testing

Building a powerhouse digital marketing program

- 6 million unique web visitors
- 100,000 emails in house file
- 40,000 Facebook followers
- 1.3 million cumulative YouTube views



Shifting Priorities – Did it work?



Advance Preparation & Launch

- Prepare your customer service staff for questions, confusion and difficult customers
- **FAQ is a must!**
- **Remember to include your social media staff** (people comment on anything and any platform ...whether a member or not)
- Launch program Sept. 2018 – early bird renewal mailing with discount **(\$5 - \$15)**
- Followed by 3 printed mailings and electronic notices



PHS Renewal Results: *Ups and Downs*

HOUSEHOLD

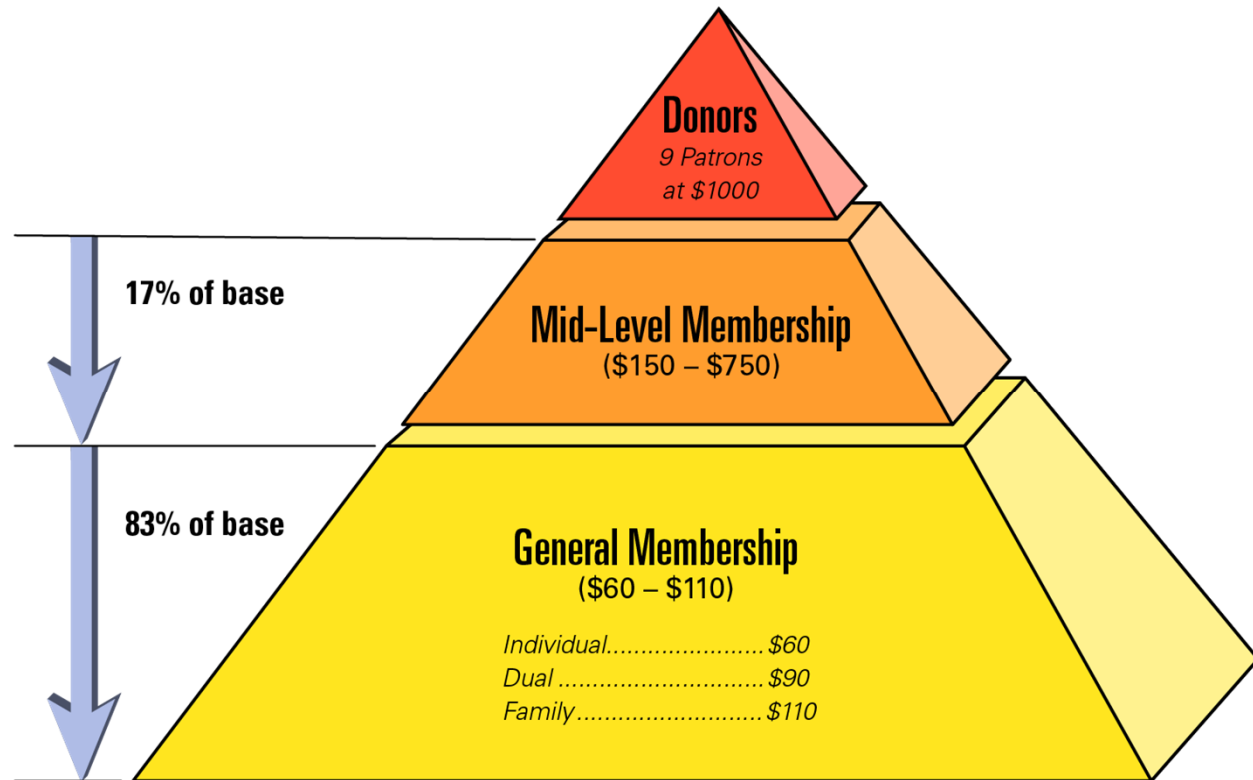
- Renewal rates not impacted (68%)
- Did not migrate as projected
- 15% upgraded to \$110 or higher
- 85% downgraded to \$90 Dual
- Maintained member counts
- WHY? **Desired 2 tickets thus Dual - a less costly option**

HOUSEHOLD PLUS

- Renewal rates declined (50% vs. 60%)
- 51% upgrade – exceeded projections
- 49% downgraded to Dual
- Net loss in member counts due to lower renewal rates
- **Leadership buy-in**: Agree in advance that HH Plus benefits as **too generous** compared to cost of 4 Flower Show tickets

2018 Renewal Trends & Impact

- *General Membership: 2,239 or 26%* moved to level at \$110 (Family) or *higher level*
- *New Friends & Family: 1,354 or 27%* moved to *\$150 Friends and Family*, bridge between lower and mid-range levels
- Average gift increased from *\$90 to \$118*
- *(9) Patron Memberships* – new \$1,000 level





2018 Acquisition Trends & Impact

- 65% less Pak sales due to higher price (**leadership buy-in**)
- \$130,000 loss from prior year's revenue
- Single FS **Ticket Purchases increased by 17,000** but attendance about the same
- Single FS **Ticket Revenue increased by 25%**
(organizational-wide benefit)

Membership	2017	Count	2018	Count
Value Pak	\$105 - \$110	1,149	\$160	161
Duo Pak	\$65 - \$70	<u>1,072</u>	\$85	<u>618</u>
Total		2,221		779

Membership	2017	2018	Difference
Revenue	\$208,000	\$77,600	(\$130,400)



Lessons Learned Year 1 - What happened?

2016	2017	2018
Associate <i>No FS Preview</i>	Associate <i>No FS Preview</i>	Individual, Dual Family NEW Receive FS Preview
Household w/Preview Household (2) Household Plus (4) Value/Duo Pak <i>(sell 4,204)</i>	Household w/Preview Household (2) Household Plus (4) Value/Duo Pak <i>(sell 2,221)</i>	Family & Friends Supporter Sponsor Sustainer Patron Value Pak <i>(sell 780)</i>
Direct Mail 145,000	Direct Mail 145,000	Direct Mail 145,000
20,200 memberships	18,000 memberships	16,000 memberships

Leadership Shift:
Transactional to Philanthropic



Lessons Learned Year 2 – Rebuilding in 2019 and beyond

- **Renewal Rates** – returned to 65% (higher than past 5 years)
- **New Levels:** \$150 Family & Friends – 68% and \$1,000 Patron – 75% (loyal!)
- **Mid level Ratio:** Holding steady with minimum downgrades
- **Direct Mail Expanded:** 354,000 prospects and 1,500 acquired
- **Average Sale:** Remains \$15 higher than prior program
- **Family Audience:** Not significant membership opportunity (goal)
- **Member Count:** 15,000 households (we are not there yet!)

ANDY WARHOL **BILLY SCHENCK**
COWBOYS AND INDIANS MYTH OF THE WEST

MAY 25 – SEPTEMBER 3, 2018

Join today and enjoy the exhibition and everything the museum has to offer, first and free!

FIRST

Enjoy free access to Private Exhibition Previews before the general public at an exclusive reception in the company of fellow museum supporters! Respond by May 14th to attend *Andy Warhol: Cowboys and Indians* and *Myth of the West* by Billy Schenck Preview Party on May 24, 2018.

FREE

Get 12 full months of free admission to the museum including rotating exhibitions throughout the year, access to public events and the museum's film series, and discounts on special events including the Fiesta River Parade Party.

AND MORE!

Receive priority seating at museum lectures, 20% discount in the Museum Store, one-year subscription to *Authentic Texas* magazine, and more! Enjoy guest passes and reciprocal free admission to other organizations throughout the US when you enroll at a Contributing Membership level.

QUESTIONS?

Call the Membership Department at 210.507.4864 or visit us online at briscoemuseum.org/warhol.

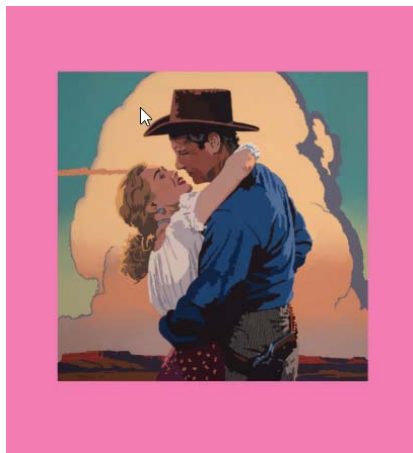
Exhibition organized by the Briscoe Western Art Museum.
Presenting sponsorship generously provided by Wyatt Ranches.
Additional support made possible by Valerie and Jack Guenther, the Host Committee, and the City of San Antonio Department of Arts and Culture.

Front:
Andy Warhol, John Wayne (from Cowboys and Indians), 1966, Screenprint. Courtesy of Valerie and Jack Guenther. © 2017 The Andy Warhol Foundation for the Visual Arts, Inc. / Licensed by Artists Rights Society (ARS), New York.

Billy Schenck, *The Last Sunset, 2016, Oil.*



BRISCOE
BRISCOE WESTERN ART MUSEUM
210 W. Market Street | San Antonio, TX 78205
210.299.4499 | BriscoeMuseum.org



Year 1



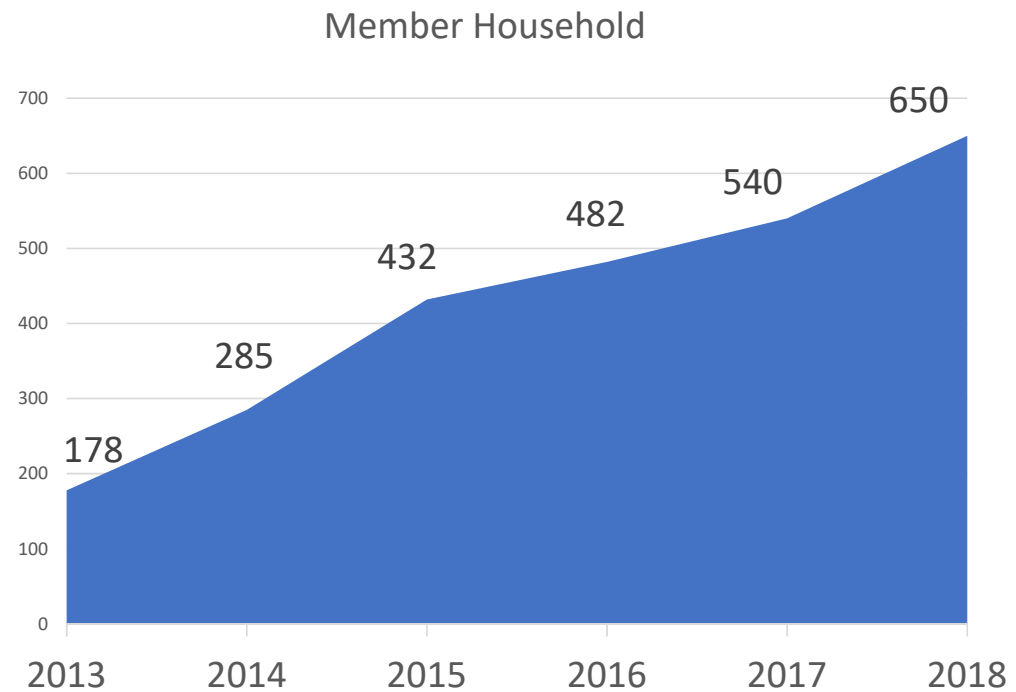
Success in reaching more prospects!
(beyond museum visitors)

Find like-minded prospects (research findings)

- 8,800 prospects - **½ are new prospects**
- Market new membership program
- Response rate: **0.9%**
- 1 new Collector Circle (\$1,500)
- 2 new Patrons (\$750) – **new level**
- Revenue ~ \$10,400
- Expense ~ \$7,000 (built confidence)
- Leadership deems a great success!

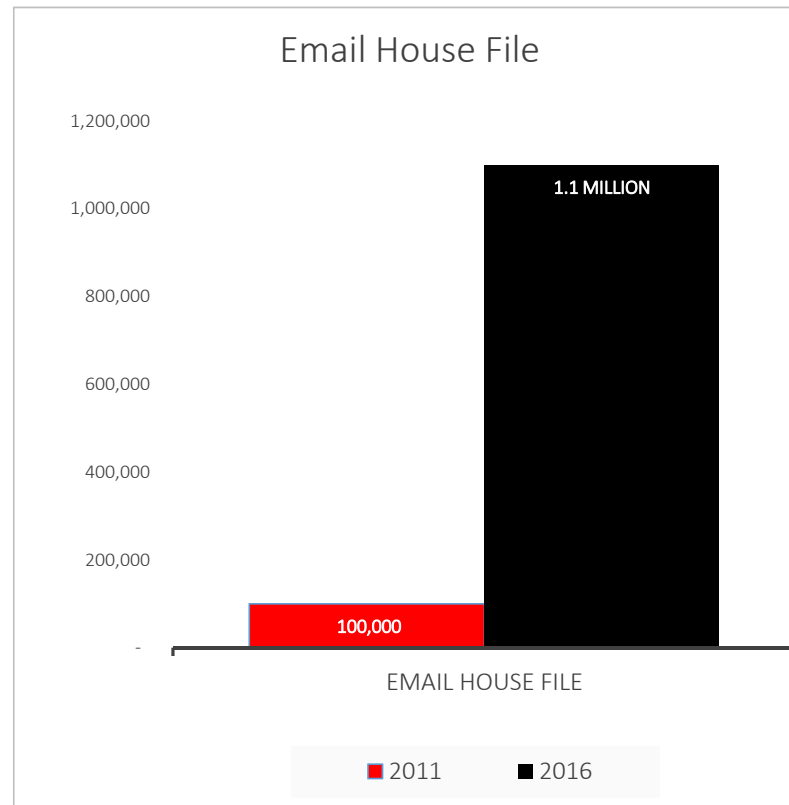
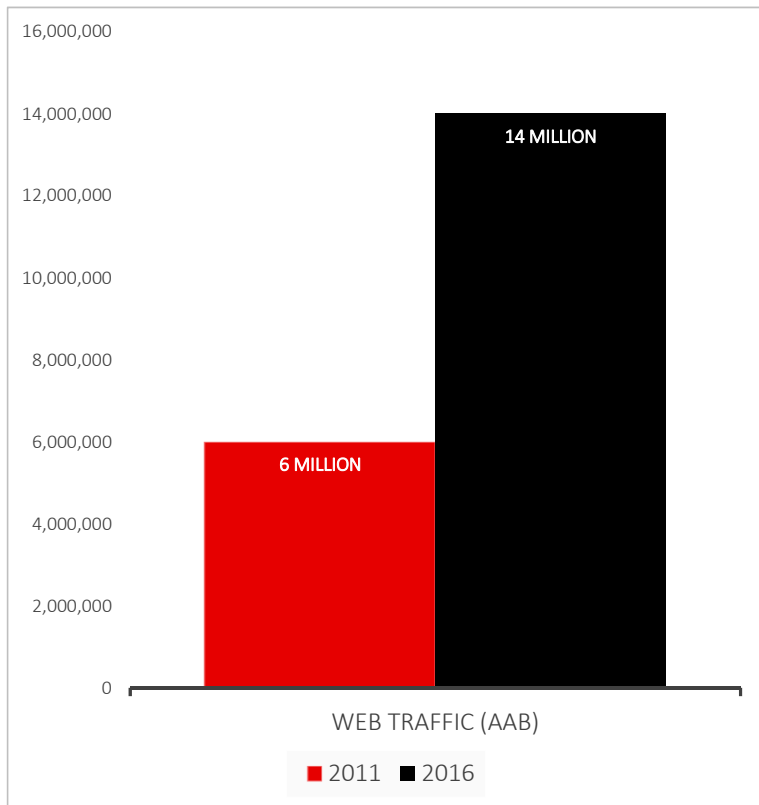
Lessons Learned

- Growth is not the sole responsibility of the membership department!
- Inform and instruct leadership about how membership “works” to gain buy-in critical to success
- Tracking systems document performance and avoids criticism with other department staff
- Invest in small/boutique mailings to engage new prospects
- Partnerships with marketing required



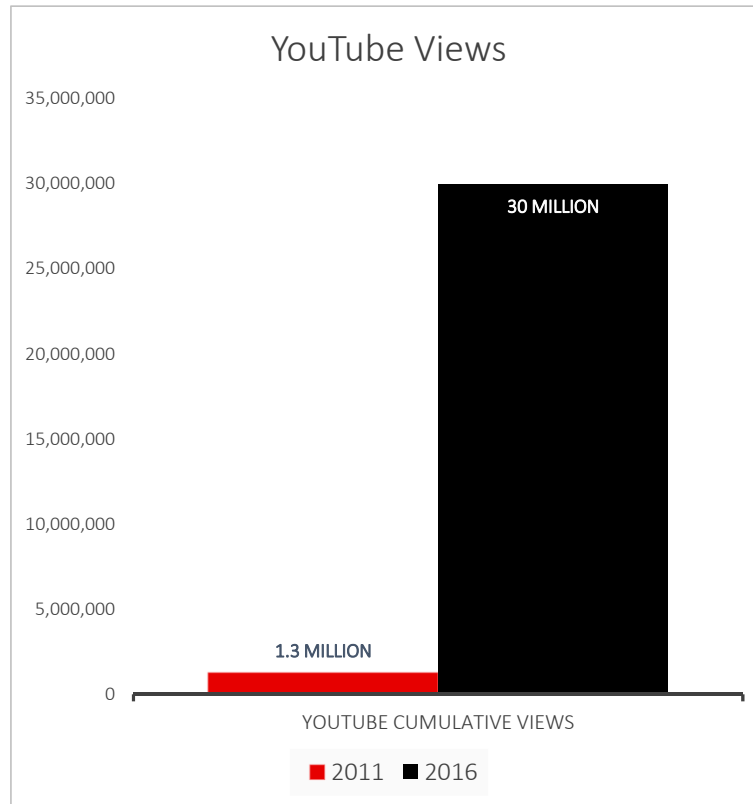
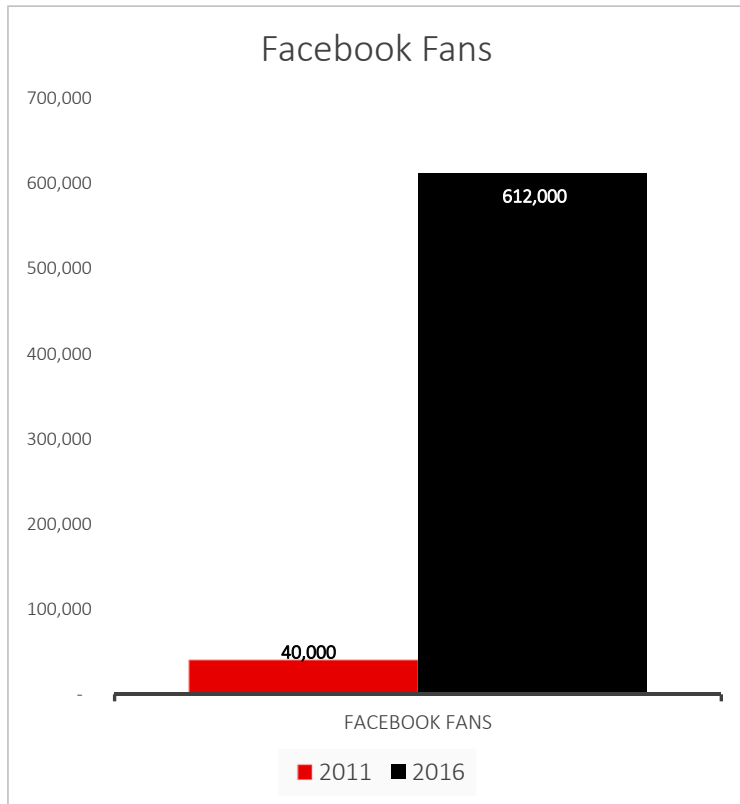
Lessons Learned

Growth of Engagement – Web & Email



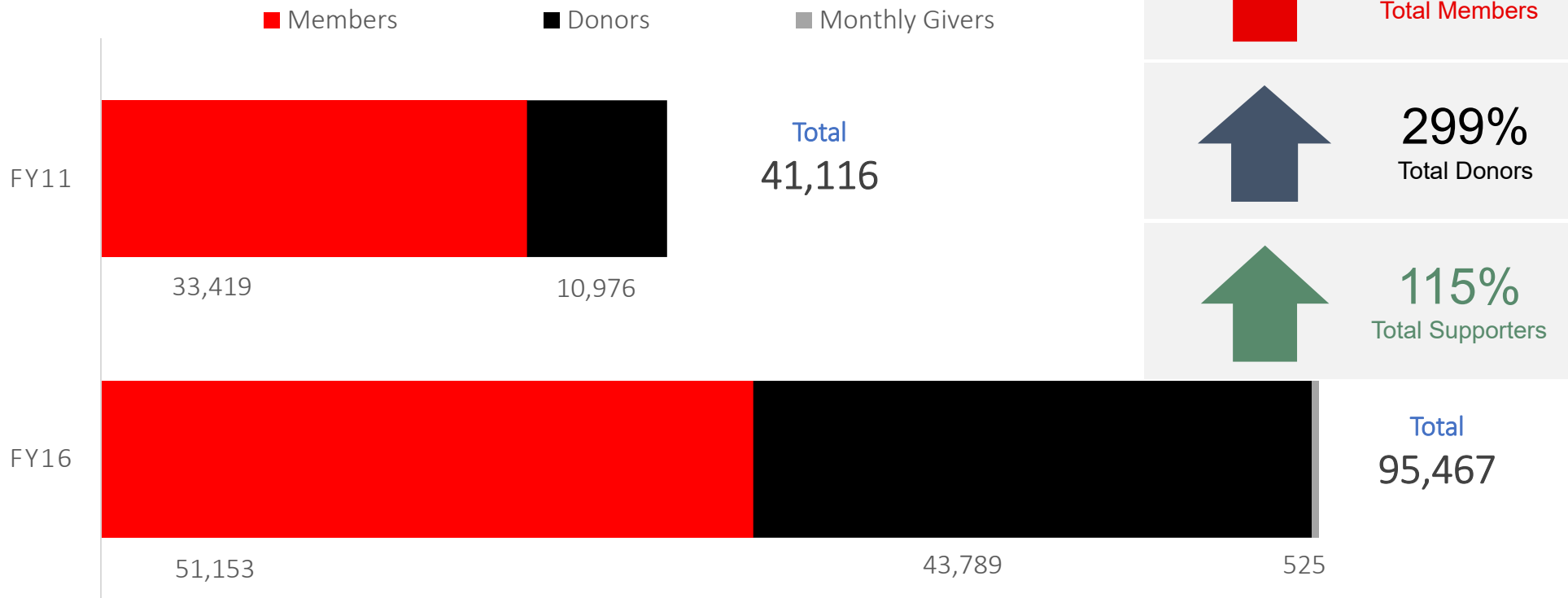
Average Email Open Rate
27%

Growth of Engagement – Social

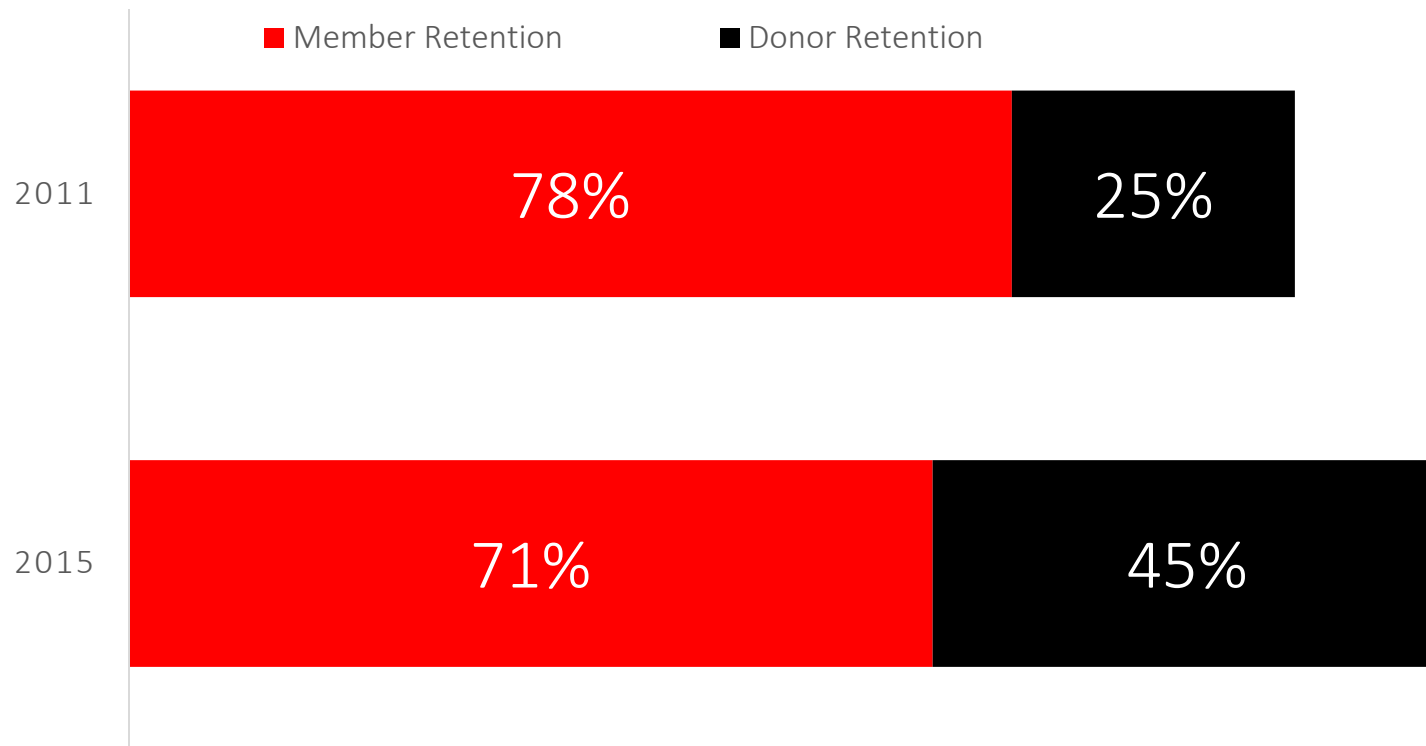



Twitter Followers
21.8K


Growth – Number of Supporters



Retention Rates – Members & Donors



 **7%**
Member Retention Rate

 **20%**
Donor Retention Rate

Growth – Average Gift

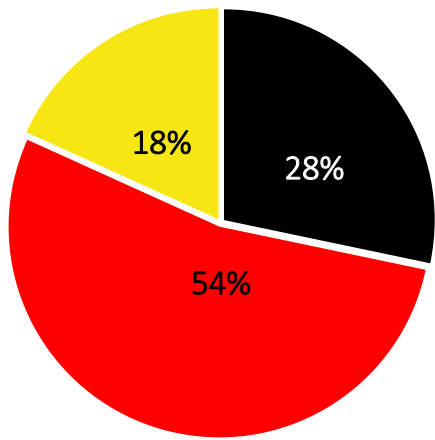


16%
Gift Amount

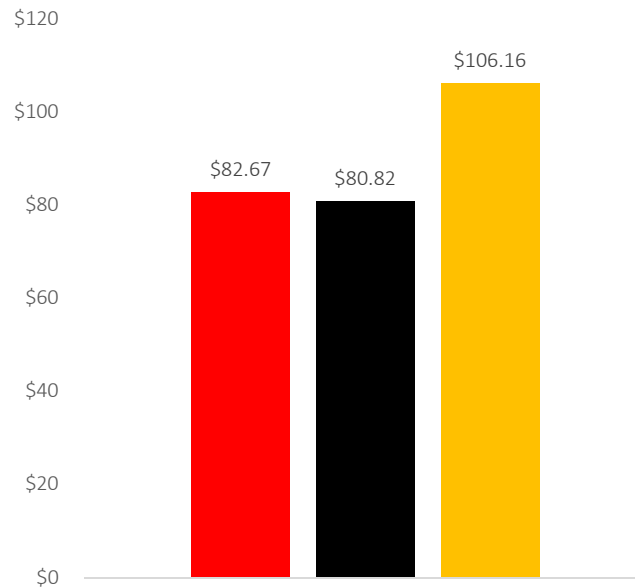
No Inverse
Correlation

Increased Frequency of Giving

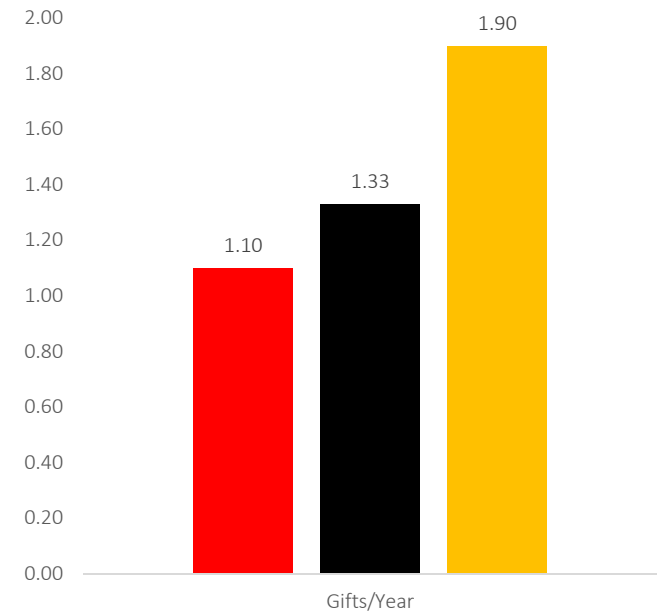
File Composition



Average Gift Amount



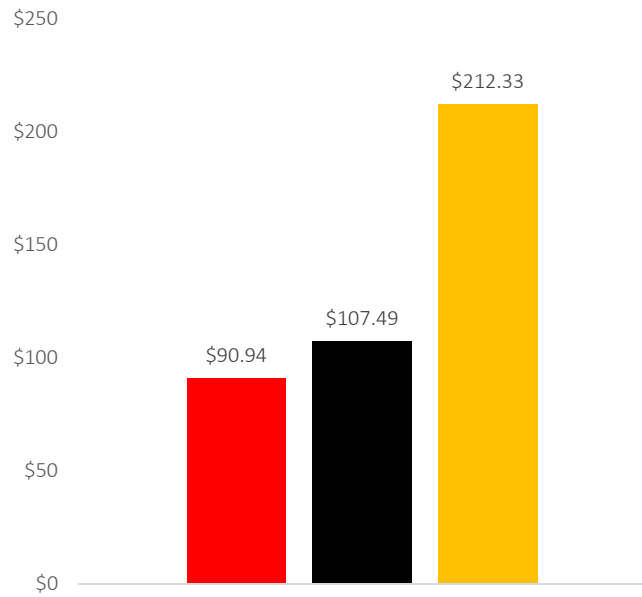
Average Gift Frequency



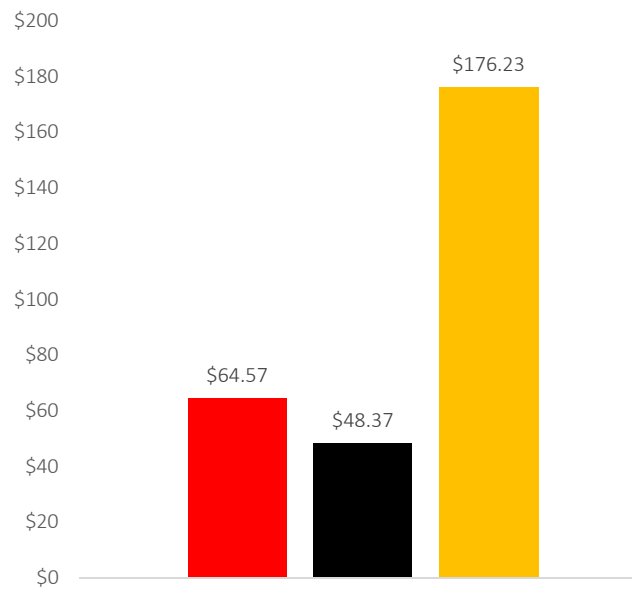
Member Only Donor Only Member-Donor

Annual Value

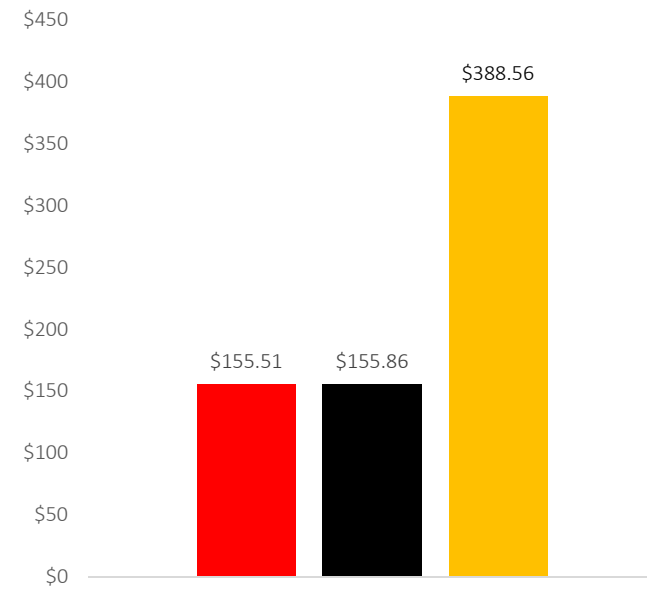
1st Year Annual Value



2nd Year Annual Value

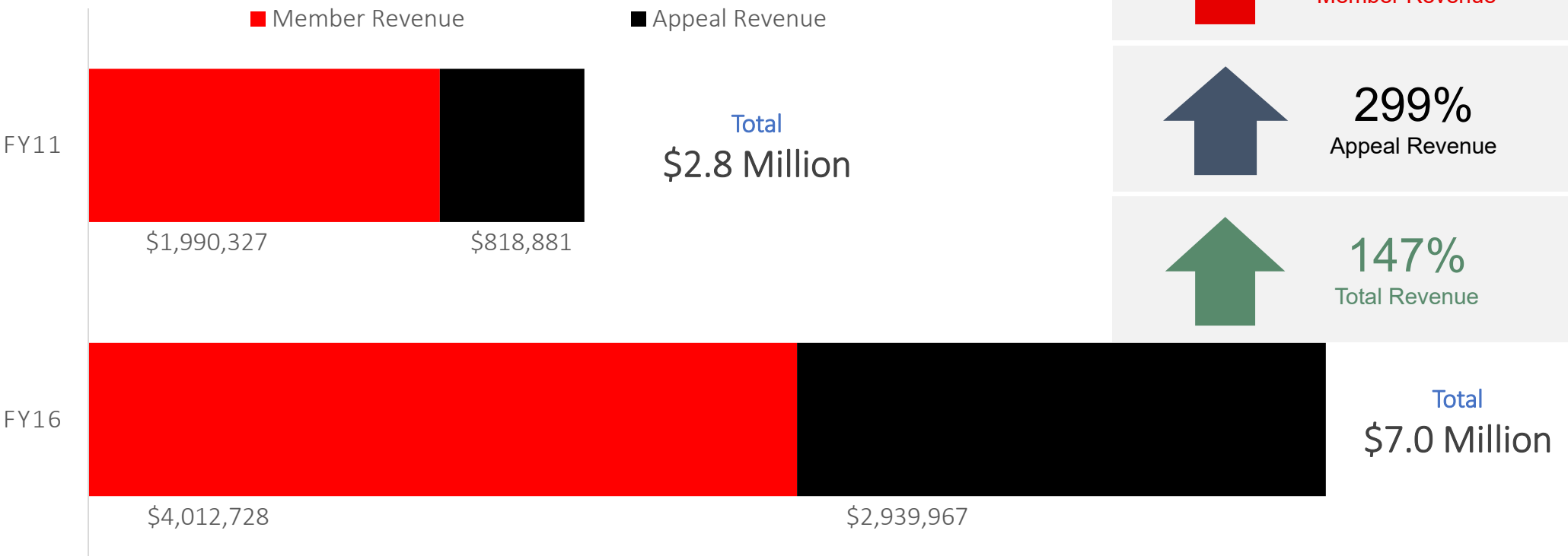


2 Year Value



Member Only Donor Only Member-Donor

Growth – Revenue



Not Member vs. Donor but **Members & Donors**

Keep Constituent Groups Distinct

- Members and donors are not the same
- Effectively target and engage supporters
- Different communication preferences
- Different motivations
- Different ways they engage
- Build your marketing strategies for each



Don't Pigeonhole Constituents!

- Be supporter-centric – don't restrict the person who is a donor or member!
- Give multiple options to participate
- Increases reach of programs and fundraising
- Raised more funds from crossover members + donors



When Priorities Shift...

- Maximize data
- Debunk Myths
- Research
- Forecast Models
- Involve and inform leadership

Its difficult to solve a problem that you don't even know exist

- Numbers matters: *Dust off or detox data*
- Demonstrate internal partnerships – *can't do this alone*
- Baseline to informal, *let members & donors vote with their feet and wallets!*
- Models are essential - *change brings risks and Cinderella endings not guaranteed*
- Regular communications, updates and reviews with leadership/team members



Lynn Swain



Suzanne Betts



Karen Pirinelli



Diane Ward

Questions? Comments?
Thank you for attending!



Lynn Swain



Suzanne Betts



Karen Pirinelli



Diane Ward