

*Where is your philanthropic giving feeling the most pressure?*

Finding new donors

Renewing existing donors

Upgrading support

Showing impact

Tracking what matters

Something else?

**Answer by poll, or type your answer in the chat**

# *Strengthen Your Annual Fund*

*Thursday May 21, 2026*



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# *What we'll cover today*

01

## **The Giving Landscape**

Where your annual fund sits and why it matters now

02

## **Acquisition**

Who to ask, how to ask, and what works

03

## **The Crossover Opportunity**

Turning ticket buyers into donors

04

## **Renewal & Upgrade**

Keeping and growing the donors you already have

05

## **Stewardship**


Making donors feel the impact of their gift

06

## **Measurement**

Tracking what moves the needle


LEADING  
THE WAY  
*with TRG Arts*



Why Your *Revenue* Problem Might Really Be a *Relationship* Problem

Season 3 | Episode 1

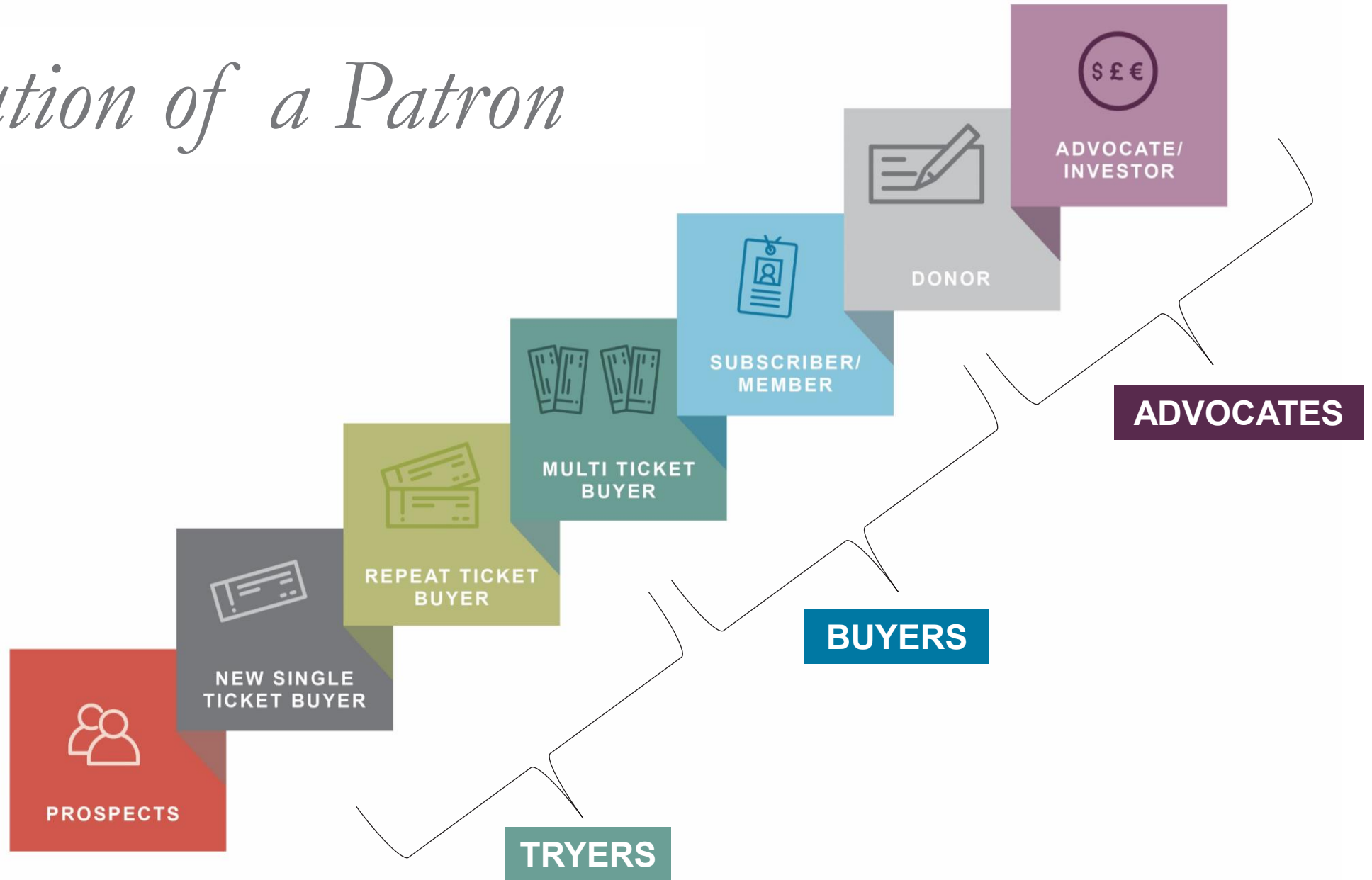
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TRG  
ARTS

“Your *Relationships*  
Are What Drive  
Your *Revenues*.”

# *Evolution of a Patron*



# The giving landscape is shifting.

The opportunity is moving the *right people* toward *repeat engagement* and *renewable giving*.

## The loyalty continuum

*Your annual fund is the primary engine for moving people up the engagement ladder.*

Not everyone becomes a donor, but every donor starts somewhere.

**TRYERS**  
**90%+**

of database  
One-and-done,  
infrequent, low  
value

**BUYERS**  
**5–10%**

of database  
Recurring, high-  
value ticket buyers  
Your best donor  
prospects

**ADVOCATES**  
**<3%**

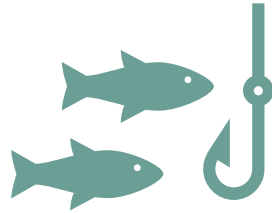
of database  
Donors, loyalists,  
champions  
**10× more lifetime  
revenue vs Tryers**

**Buyers are the bridge to annual fund growth**

Strengthening the annual fund means building a repeatable system that moves more Buyers into Advocates.

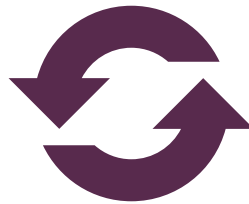
# Your annual fund has three jobs

Each requires a different strategy, message, and cadence.



## Acquire

Bring likely supporters into the donor pipeline.



## Renew

Protect your donor base and prevent relationship decay.



## Grow

Upgrade giving over time through clear next steps.

# *Acquisition*

# Not all revenue costs the same to generate

Use cost-of-sale to guide smarter campaign investment.

Total Campaign  
Expenses



Total Gifts  
Received



**Cost  
of Sale %**

## Renewal

**2–5%**

*existing relationships → lower friction*

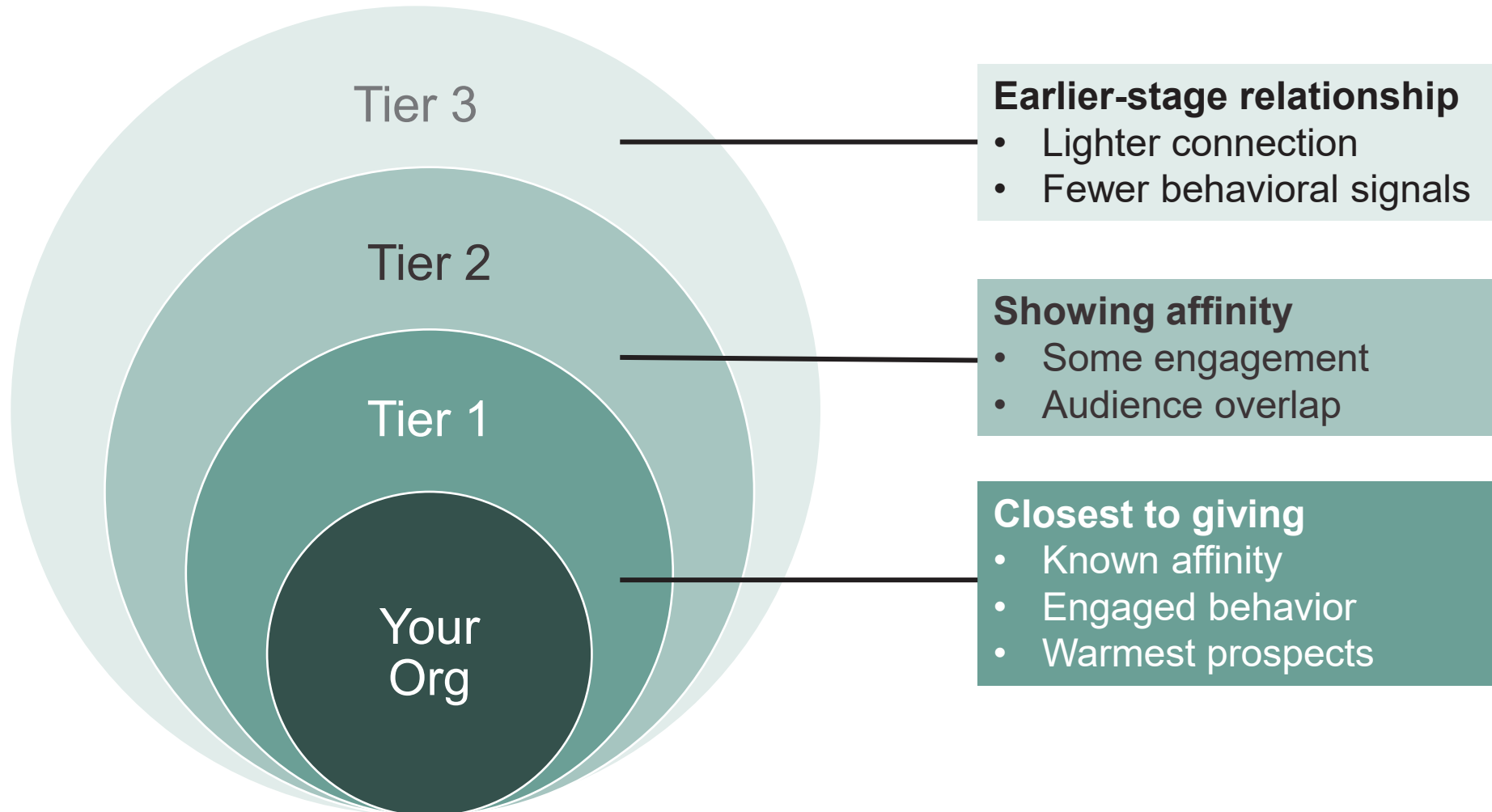
## Acquisition

**10–20%**

*new relationships → higher up-front investment*

# Smarter acquisition starts closer to home

Use existing relationship signals to guide where you invest first



# Your best donors are already in your database

You probably just haven't asked them yet

## Lapsed donors

Have given before. Know your mission.



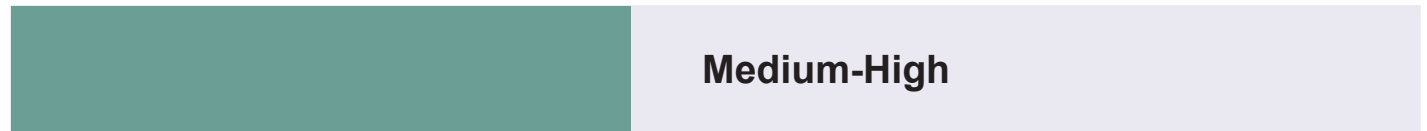
## Multi-year subscribers / members

Repeated transactional commitment.



## Single ticket multi-buyers

Frequency signals affinity.



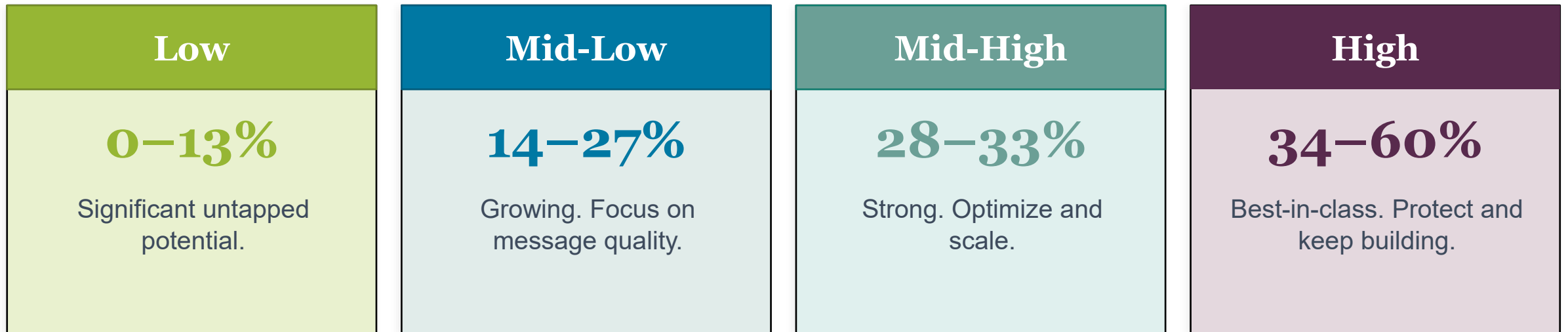
## Holiday / first-time buyers

Wider net. Right offer matters.



# Know your subscriber–donor crossover rate.

This is probably your most actionable number.



# *Renewal & Upgrade*

*Don't make donors guess they are renewing.*

**Tell them clearly:** what they gave, when they gave, what their support made possible, and what you are asking them to do next.

**MEMBERSHIP**

**2NDSTAGE**

**RENEW BY MAY 31!**

Dear

Thank you for being a Friend of Second Stage, the only Broadway company exclusively devoted to producing the work of living American playwrights. Our 44<sup>th</sup> season has been one for the books – and we're not done yet! Take advantage of all your membership has to offer this spring and beyond by **renewing your Friends of Second Stage Membership at the \$125 level by May 31<sup>st</sup>.**

 **DES MOINES PERFORMING ARTS**


Your Donor benefits will expire on **Expiration.**  
Renew today by returning the form at the bottom of this letter.

Date

With gratitude,

Rebecca Gunn  
Director of Annual Giving

**Please renew by February 19th!**

P.S. Your gift will also count toward the 2019/20 State Challenge Grant, multiplying your generosity even more! 

**YES! I want to renew my support for the North Carolina Symphony!**

# Segmentation isn't optional.

Different donors need different conversations.

## **New (first-time) donors**

Say thank you loudly and quickly. Welcome them in. Don't assume they know why they gave.

## **Renewing (multi-year) donors**

Remind them of their loyalty. Anchor the next ask to what they gave before.

## **Mid-level donors (pipeline)**

These are your future major donors. More personal outreach, assertive upgrade asks.

## **Lapsed donors**

Re-introduce the mission. Softer ask, lower suggested amount. Win back the relationship first.

## **Recent upgraders/downgraders**

Acknowledge what changed. Customise messaging to their current trajectory.

## **Crossover (ticket + donor)**

The magic of 'and'. Higher lifetime value — treat them accordingly.

# The right message changes everything.

Three questions every appeal must answer.

## 01 What do you want me to do?

Make the ask unmistakable.  
One clear action, not three.  
Suggested amount, specific fund, clear deadline.

## 02 Why?

Connect to mission and impact, not operational need. Audiences fund transformation, not gap-filling. Tell a story.

## 03 By when?

Urgency is real. Deadlines, matching gift expiries, and year-end moments all increase conversion rates.

## Matching gifts give urgency a reason.

Even a modest match dramatically increases both participation rates and average gift size.

# The renewal ask should make the donor feel known.

## Lead with their loyalty

"You've been a supporter for X years..." Acknowledge the relationship before asking anything.

## Use their anniversary

Calendarize renewal at 11 months. The message writes itself: "Your gift expires next month."

## Three waves minimum

Month -1 (mail/email), month 0 (personalized reminder), month +1 (final appeal). Don't send once and hope.

## Connection to the cause

Every donor, regardless of level, needs to know their gift does something. Impact before ask.



# The upgrade ask should feel like a natural next step.

## Ask incrementally

Small steps build commitment. A \$150 donor becoming \$200 is more sustainable than a cold jump to \$500.



## Anchor the ask

Present the desired amount as the default, easiest option. Make the path of least resistance the right path.



## Use your data

Where do donors get stuck? What is their holistic relationship with you? Appended income data can power assertive but appropriate asks.



## Test everything

Subject lines, ask amounts, timing, channels. Small tests compounded over seasons = significant lift.





# Milwaukee Symphony Orchestra

**Strategy:** assertive renewal asks using appended household income data, targeting mid-level donors as the major gift pipeline.

**40%**

gave MORE than  
the ask

**49%**

gave at or near the  
ask

**50%**

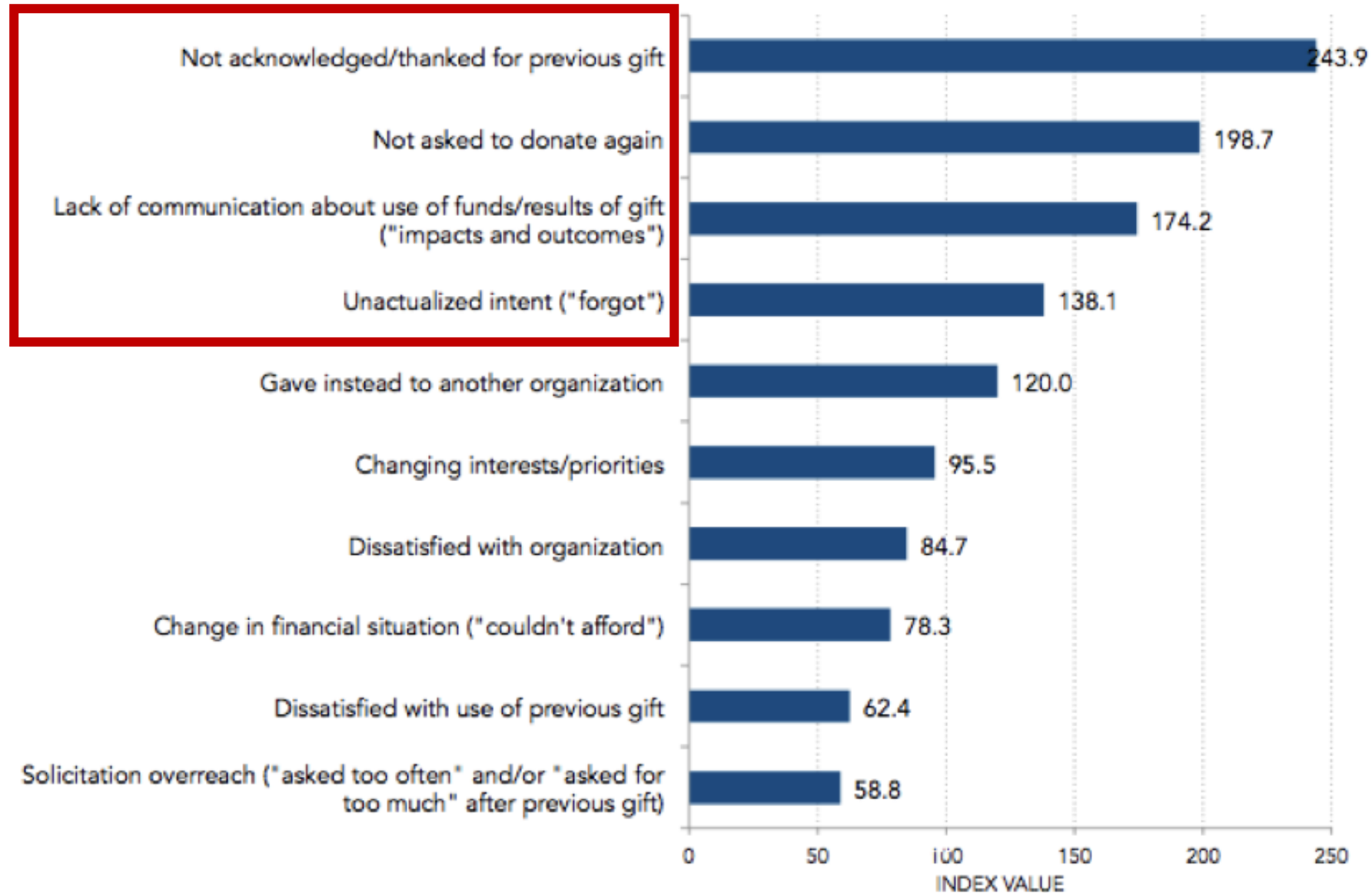
increase in revenue  
YoY

**Avg ask: \$2,432 · Avg received: \$3,637**

# *Stewardship*

# Why did you not make a donation?

(Previous \$250-\$2,500 annual donors who had did not donate again within 24 months)



# Retention starts the moment someone gives.

Stewardship is your renewal strategy.

## Say thank you... fast

Within 48 hours. Personalized where possible. A video message, a phone call, a handwritten note (the format signals the relationship).

## Communicate impact

Not 'you helped us keep the lights on.' Show the specific difference: the young person who discovered music, the show that sold out because of donors like them.

## Surprise & delight

Unexpected touches between asks. Backstage access, a note from an artist, early booking windows. These are loyalty investments.

## Track benefit usage

If patrons aren't using their benefits, they won't renew. Proactively remind and remove friction from redemption.

## Ask for feedback


Surveys, personal outreach, NPS. Donors who feel heard give more and stay longer. Silence breeds disengagement.

## Plan retention proactively

Don't wait for lapse. Cultivation and retention should run simultaneously. Development and marketing must be aligned.

**The donor who feels seen is the donor who stays.**

**BALLET**  
ARIZONA  
JB ANDERSEN ARTISTIC DIRECTOR



Thank you for being part of our Ballet Arizona Family!  
Your support, patronage, and advocacy for the performing arts is inspiring. We miss performing for you and can't wait to bring the beauty of ballet back to the stage.

Ballet Arizona    Donate Now    2020-2021 Season

f t in v @ p

*“Hi Richard and Susan, this is Arianni Martin, a company member from Ballet Arizona, and today I want to take a moment to celebrate you and say thank you so, so much...”*

# *Measurement*

# Measure what moves the needle.

Focus your data for action.

## Essential

- Unit goal (gifts)
- Revenue goal
- Progress to goal
- Progress vs. last year

## Ideal

- Pace over time
- By giving level
- New vs. renew split
- Renewal rate
- Cost-of-sale

## Bonus

- Subscriber–donor crossover
- Upgrade rate & data
- Benefit usage rate
- Donor NPS / feedback

Track what matters to your goals right now. Build toward the Ideal tier over time.

# Your 30-day Challenge

Five practical steps to take after this webinar.

- 1 Audit** List annual fund segments and current messaging.
- 2 Prioritize** Choose 2–3 highest-opportunity acquisition groups.
- 3 Calendarize** Map renewal waves by anniversary month.
- 4 Rewrite** Make each ask answer: *what, when, why*.
- 5 Track** Create a simple renewal / acquisition dashboard.

## Book a 1:1 Revenue Strategy Session

We'll work through your audience behavior, campaign structure, investment questions, and immediate opportunities together.



**Stronger relationships.  
Stronger revenue.**