

## ABSTRACT

Historic house museums and villages have been struggling for the last 25 years to sustain their operating costs. Many have been focusing on interpretation as a way to engage the public and gain a new audience. This project looks at a different way of viewing the problem to focus on fundraising and development as a way to engage donors and develop a new commitment to these historic institutions. This project surveyed and interviewed high-level donors from Dallas Heritage Village in Dallas, Texas concerning their donation practices. This project found that personal connections are vital to fundraising and governing bodies must understand their role in the process.

**Cultivating Connections: A Survey of Dallas Heritage Village Donors**

by  
Lisa Simpson, B.A.

A Project  
Approved by the Department of Museum Studies

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Submitted to the Graduate Faculty of  
Baylor University in Partial Fulfillment of the  
Requirements for the Degree  
of  
Master of Arts

Approved by the Project Committee

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By

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And finally, my fellow 2011 Museum Studies graduates provided so much support in this process.



## DEDICATION

I would like to dedicate this project to my parents who have provided unwavering support throughout my life.

## CHAPTER ONE

### Introduction

One of the scariest words in the museum world is fundraising. Most museum professionals do not want to be involved in the process and do not believe that it should be part of their job. Those who do understand the importance of fundraising often face many hurdles in the process due to lack of knowledge of the field and fear. The question you will hear most is “How do you ask someone for money?” and there is no tried and true answer because each museum is different from one to the next. Museums, particularly historic house museums and villages, need fundraising now more than ever. As the need grows so does the competition for donors. This project will discuss the fundraising strategies of one historic village, Dallas Heritage Village, and the motivations of their donors. Donors were surveyed online and in person regarding their views on the museum and philanthropy. The information gathered will aid the museum to better understand their donors and help the museum expand their donor base through a reliance on relationship building and board involvement.

Nonprofit institutions throughout the country rely on the support of individual donors not only to support special projects or programs but also to fund their daily operations. The competition for donations among nonprofit organizations has always been steep, but in recent years with the downturn of the

economy the competition has intensified. Nonprofits are thinking of new ways to connect with donors in order to remain at the top of the annual giving priority list.

There has always been a reliance on philanthropy in the United States. In many countries around the world nonprofit institutions, such as museums, are funded largely by the government through taxes on the citizenry. In the United States, federal tax laws allow for an incentive for citizens to contribute to nonprofits. Besides tax deductions people have their own diverse reasons for contributing to nonprofit institutions. Museums and other arts and cultural organizations have to be creative within their development efforts to make the right pitch to the right people. They do not have a built-in pool of alumnae, former patients, or the empathy associated with social consciousness organizations. Museums rely on memberships and earned income to support their operations but they are always looking for that elusive major-gift donor. History museums have a particular challenge in not only attracting donors but visitors as well.

Many nonprofit institutions today are struggling for survival. The economic downturn in recent years has not only caused families and government to cut back, but also nonprofits. Many nonprofits that receive a portion of their operating budget from state or local governments were the first to feel the loss. Many families are feeling budget constraints as well. With unemployment rates above 9% and companies cutting back hours for their employees many families do not have the extra funds for donating to nonprofits. Nonprofit institutions have to work harder than ever to secure funding.

## *A Brief History of Philanthropy in the United States*

Citizens in the United States have a long history of support for nonprofit organizations. The National Philanthropic Trust continually conducts research on the history of philanthropy in America and has set up a short timeline with significant events.<sup>1</sup> The United States was founded without a state religion but by a group of religious men. Many of the first pilgrims were escaping religious persecution in Europe. There is a long-held Christian tradition in the United States. From this tradition, we have developed many of the morals and values of our society. Robert Payton and Michael Moody discuss the influences of Christianity on philanthropy in America in their book *Understanding Philanthropy*. The authors cite several passages from the Old Testament that demonstrate God's desire to have his followers contribute to society and help those less fortunate. It is clearly stated that God wishes his followers to donate out of their surplus of crops or wealth.<sup>2</sup> The authors also recount the story of the Good Samaritan. The core issue of the story is that the Samaritan helped the Jew for the Jew's benefit, not his own.<sup>3</sup> Anyone in need of help should be helped no matter who they are or how they relate to you.

Long before the signing of the Declaration of Independence people in America were participating in philanthropic efforts. According to the National

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<sup>1</sup> "A Chronological History of Philanthropy in America- Home," National Philanthropic Trust, <http://www.historyofgiving.org> (accessed January 3, 2011).

<sup>2</sup> Robert Payton and Robert Moody, *Understanding Philanthropy: Its Meaning and Mission* (Bloomington: Indiana University Press, 2008) ,135.

<sup>3</sup> Payton and Moody, *Understanding Philanthropy*, 104.

Philanthropic Trust timeline mentioned before, the first large-scale philanthropic campaign was in 1643. The first recorded fundraising campaign was for Harvard University in Massachusetts. Harvard also boasts the first recorded Scholarship fund.<sup>4</sup> Early in the United States, most charitable efforts were left to the church. Parishioners would tithe and then the funds would be used to contribute to members of the community in need. This is why many people considered Harvard University's first philanthropic campaign to be begging. With the creation of the government the philanthropic role of the church diminished and made way for the rise of the State.<sup>5</sup> Men like Benjamin Franklin worked tirelessly to create institutions— some private, some public—for the betterment of their communities. Libraries, universities, churches, museums and advancement groups were founded in cities throughout the new nation. Even upon his death Benjamin Franklin left a portion of his estate to support deserving, local citizens in Philadelphia and Boston.<sup>6</sup>

The turn of the twentieth century saw the rise of the tycoon, a small group of self-made businessmen who amassed great wealth. John D. Rockefeller and Andrew Carnegie are two of the most well known for their philanthropic work. These men believed it was their duty to use their wealth for the good of others. Carnegie wrote the *Gospel of Wealth* in 1901, outlining what he saw as the duty of the wealthy to use their money wisely. Carnegie felt leaving an entire estate to heirs would only cause them to squander the fortune and that charitable foundations could not be trusted

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<sup>4</sup> "A Chronological History of Philanthropy in America- Home" 1600-1699.

<sup>5</sup> Payton and Moody, *Understanding Philanthropy*, 143.

<sup>6</sup> "A Chronological History of Philanthropy in America" 1700-1799.

to carry out last wishes.<sup>7</sup> Carnegie believed a wealthy man should spend his money in service of the public good. He practiced what Payton and Moody refer to as “Scientific Philanthropy.” Scientific philanthropy developed out of a fear that philanthropy would create more of what it hoped to alleviate. Supporters of scientific philanthropy sought to distinguish between the deserving and the undeserving; under this theory they should help only those who could not work to support themselves. By helping the able-bodied a philanthropist would only be creating what amounted to laziness.<sup>8</sup> These wealthy scientific philanthropists set the stage for the grantmaking process we know today. Since these men were directly involved in how their funds were being used, a certain request had to be made and proven worthy.<sup>9</sup>

Payton and Moody define philanthropy as “voluntary action for the public good.”<sup>10</sup> The authors emphasize the importance of understanding both the actions and the intentions of philanthropy. They claim there are two actions of philanthropy: to provide relief of suffering and to build communities.<sup>11</sup> Obviously, museums fall into the second category. The authors also describe five roles nonprofits play in society. First is the *service* role which means providing services

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<sup>7</sup> Andrew Carnegie, *The Gospel of Wealth, and Other Timely Essays*. (Century, 1901) 8.

<sup>8</sup> Payton and Moody, *Understanding Philanthropy* 144.

<sup>9</sup> *Ibid.*, 145.

<sup>10</sup> *Ibid.*, 27.

<sup>11</sup> *Ibid.*, 28.

or meeting needs, particularly where other sectors, such as governments, fail. The second role is *advocacy* which is advocating for reform for specific groups, interests, or needs. The third role, *cultural*, is defined as expressing the need for preservation of values, traditions, or identities pertaining to a certain culture. The fourth role, *civic*, is promoting civic engagement and building “social capital.” The last role is *vanguard*, which promotes innovation and new ideas.<sup>12</sup> Many nonprofits today take on multiple roles within their community to foster success for the community as a whole. These roles can determine the relevance of a nonprofit. The more roles a nonprofit plays, the more involved and entrenched it becomes within the community. These ties to a community lead to support not only financially but also with volunteer time. Carnegie and his peers set the standards for how Americans view the wealthy. Society expects the extremely wealthy give back and contribute to the public good. Today we see Bill and Melinda Gates and Warren Buffet contributing substantial amounts of their wealth to charitable and nonprofit organizations.

### *Fundraising within Nonprofit Institutions, Specifically Museums*

While all of the strategies and research apply to museums and cultural institutions they face a different set of challenges that other nonprofits do not. In 2002, the American Associations of Museums released its Guidelines for Museums on Developing and Managing Individual Donor Support, which stated that donors

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<sup>12</sup> Ibid., 34-35.

can affirm their commitment to the arts through museum donations.<sup>13</sup> While many donors choose to support the arts, organizations are still struggling to retain donors and locate new ones. Paulette Maehara, the President and CEO of the Association of Fundraising Professionals, suggests the key to successful fundraising in museums lies in forecasting trends. She discusses trends museums need to tap into in order to have successful fundraising campaigns. One trend she discusses is competition for donors and contributions has grown substantially over the last 25 years. The number of charities in the United States has more than doubled while the amount of money given has only risen slightly.<sup>14</sup> Museums have to compete with children's organizations, hospitals, and health organizations along with other arts institutions. There seem to be several organizations with similar missions over saturating the market.

Another trend in the fundraising world that is parallel to the museum world is the call for more technology. Paulette Maehara states nonprofits have been believed to be behind the "technological curve" but that can change.<sup>15</sup> Museums are becoming more of a social media presence and many have digitized their collections and placed portions of them online for viewing. This expansion can lead to a greater

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<sup>13</sup> "AAM Guidelines for Museums on Developing and Managing Individual Donor Support," American Association of Museums, November 2002, [http://www.aam-us.org/museumresources/ethics/indiv\\_support.cfm](http://www.aam-us.org/museumresources/ethics/indiv_support.cfm) (accessed January 23, 2011).

<sup>14</sup> Paulette V. Maehara "State of Fund Raising: Individual Giving, Trends, and Forecasting," In *Slaying the Financial Dragon: Strategies for Museums*, (Washington DC: American Association of Museums, 2003) 14.

<sup>15</sup> Ibid., 15.



public awareness and perhaps a greater connection to the museum which leads to a donation.

Today there are not just trends about fundraising but about donors themselves. Michael Wolfe and Robert Ferguson describe the “venture philanthropist.”<sup>16</sup> These donors are not necessarily young but their wealth is. They want to have a say in how their money is spent. They expect the institutions they support to be stable and follow good business practices.<sup>17</sup> This shift is actually good for nonprofits. They must prove they are fiscally responsible while actively pursuing their mission in order to obtain a contribution. Basically, museums must work smarter, not harder. These young philanthropists are the key to future financial stability.<sup>18</sup> If museums can engage donors at a young age, even as a teenage volunteer, they will have a commitment and connection to the organization for a lifetime. These lifelong connections provide a sense of ownership which lead to annual contributions over a lifetime.<sup>19</sup>

### *Historic House Museums and Villages in Crisis*

Falling attendance rates are well documented at historic house museums and villages across the United States. Most agree something needs to be done in order to

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<sup>16</sup> Michael Woolfe and Robert Ferguson, “New Money, New Demands: The Arrival of the Venture Philanthropist,” *Museum*, February 2001.

<sup>17</sup> *Ibid.*, 56.

<sup>18</sup> Maehara, “State of Fund Raising: Individual Giving, Trends, and Forecasting,” 16.

<sup>19</sup> Karen Brooks Hopkins and Carolyn Stolper Friedman, *Successful Fundraising for Arts and Cultural Organizations*, 2nd ed. (Phoenix Ariz.: Oryx Press, 1997).

preserve the state of historic structures but not many can agree on the solutions. In her book, *New Solutions for House Museums*, Donna Ann Harris describes some solutions for floundering historic house museums and villages. The main problems she sees facing historic house museums and villages are lack of funds, lagging attendance, aging volunteers, and the high cost of renovations. Many historic house museums and villages do not have endowments to rely on for money, and, even if they did, many endowment principles were eroded when the stock market fell.<sup>20</sup> There is also a lack of planned giving amongst the boards and volunteers. Many people involved in house museums are of the Greatest Generation (born between 1911 and 1924) they are well into their 80s and not being solicited for planned gifts by house museums.<sup>21</sup> If a planned gift was initiated this might demonstrate to future generations the importance of preserving these historic structures. Very few house museums are attracting younger generations as volunteers and board members. Young donors insist they are too busy. Young baby boomers still have children living at home and mortgages to pay.<sup>22</sup> Without sufficient funding many house museums are forced to cut back hours, programs and staff. Harris suggests that boards take a closer look at the potential of their house for new uses.

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<sup>20</sup> Donna Harris, *New Solutions for House Museums: Ensuring the Long-Term Preservation of America's Historic Houses*, (Lanham MD: AltaMira Press, 2007).

<sup>21</sup> Ibid., 13.

<sup>22</sup> Ibid., 12.

One of the solutions Harris advocates is selling homes to private owners with easements so that the property will be preserved.<sup>23</sup> Although many in the museum world seen this as a controversial solution, it is not far fetched. The board has to determine the appropriate owner so that the property can be cared for by a loving owner with the funds to do so appropriately. She also suggests that if a house museum cannot support itself the organization should think about entering into a variety of cooperative agreements with other entities, including other house museums. This might introduce the house to other members of the public and new donors.<sup>24</sup> If the historic structure is running well and not having problems, then she suggests staying on track but being aware of the situation of other historic properties in the area.

Creative solutions are instrumental to the success of historic sites and museums. Cary Carson, former Vice President of the Research Division at Colonial Williamsburg, suggests creativity is the key to transforming history museums in the technological age. Carson concentrates on two main issues facing history museums. First, young people are increasingly tech savvy and history museums must learn to keep up. Second, schools are now concentrating on math and science instead of humanities.<sup>25</sup> The rise of technology in the last fifty years has created a culture that insists on feeling included in the interpretation. They are not content to be “passive

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<sup>23</sup> Ibid., 94.

<sup>24</sup> Ibid., 86-93.

<sup>25</sup> Cary Carson “The End of History Museums: What's Plan B?” *Public Historian* 30, no. 4 (November 2008): 12.

spectators.”<sup>26</sup> Carson suggests in order to accomplish this, museums must interpret the everyday people not just the Jeffersons and Washingtons.<sup>27</sup> Although Carson’s “Plan B” for Colonial Williamsburg was slightly futuristic, involving webisodes and an on-site experience, he does think outside the box, which is crucial for the survival of history museums.

The American Association for State and Local History sees the problems ahead as well. The need for more technology and connection to visitors as well as a way to re-engage school groups after No Child Left Behind left out history.<sup>28</sup> History museums can attract the visitors and donors needed but they must figure out new and interesting ways to connect with their community. Being the storyteller is not enough in today’s society. History museums must engage with the community and demonstrate their importance.

There is a distinct need, now more than ever, to understand the donors to historic house museums and historic villages. As attendance numbers continue to decrease and the economy shows little signs of growth, museums must act. Revamping programming is not enough. History museums need to have a diverse outlook on their current state focusing on a well-rounded view of the current problems. Dallas Heritage Village understands the need for more information on fundraising with historic house museums and historic villages. This research is the

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<sup>26</sup> Ibid., 17.

<sup>27</sup> Ibid., 18.

<sup>28</sup> Dennis O’Toole, *“The Gift of History,”* American Association for State and Local History (2010).

first step in understanding donors to this field and their interest in history museums. Hopefully this knowledge can help attract new donors who are passionate not only about history but about the institutions trying to preserve it.

## CHAPTER TWO

### Working with Dallas Heritage Village

Fundraising and development studies have exploded onto the nonprofit scene in recent years as an effect of the lagging economy and many nonprofits' struggle for financial stability. Most research is broad and devoted to the field as a whole, not to specific types of institutions. Studies on topics within fundraising and development are useful to the field but unfortunately do not provide much insight into applying their findings to historic villages and other specific institutions.<sup>29</sup>

The general knowledge gained through donor motivation studies is useful to a wide variety of organizations, but motivations for donating to a historic village and to a hospital can be very different.<sup>30</sup> The developing field of philanthropic

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<sup>29</sup> There is a plethora of information on fundraising and development strategies for non profits. These are just a sampling: Payton and Moody, *Understanding Philanthropy*; Penelope Burk, *Donor-Centered Fundraising: How to Hold on to your Donors and Raise Much More Money*, (Chicago Illinois: Burk & Associates/Cygnus Applied Research, 2003); Adrian Sargeant and Elaine Jay, *Fundraising Management: Analysis, Planning and Practice*, (New York: Routledge 2010); Richard D. Waters, "The Importance of Understanding Donor Preference and Relationship Cultivation Strategies" *Journal of Nonprofit & Public Sector Marketing* 21, no 4 (October 2009); Wolfe and Ferguson, "New Money, New Demands" 2001.

<sup>30</sup> Patricia Knowles and Roger Gomes, "Building Relationships with Major-Gift Donors: A Major-Gift Decision-Making, Relationship-Building Model," *Journal of Nonprofit & Public Sector Marketing* 21, no 4 (October 2009); Waters "The Importance of Understanding Donor Preference and Relationship Cultivation Strategies".

psychology struggles with the same problems.<sup>31</sup> The information coming out of this new field targets nonprofits as a whole, not specific types of nonprofits. Led by Dr. Adrian Sargeant at the Center on Philanthropy at Indiana University the field is breaking ground on philanthropic studies using psychology instead of the typical marketing.<sup>32</sup> Philanthropic psychology studies the distinct characteristics of a donor but also uses psychology to analyze their motivations. For example, competition, that is knowing how much others had pledged in a donation drive, impacted how much money someone contributed to an organization.<sup>33</sup> Again, there is a need for information and research focused on museums and more specifically historic house museums and historic villages.

There is some research that is more focused on specific institutions such as colleges and universities and hospitals. Research by Marybeth Gasner and Noah Drezner looked into a case study of historically black colleges and universities (HBCU) fundraising efforts through Hampton Institute in Virginia. They found that following *Brown v. Board* and their withdrawal from United Negro College Fund,

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<sup>31</sup> Adrian Sargeant and Jen Shang, "Clear Insights," *Advancing Philanthropy* (May 2009).

<sup>32</sup> Neil Kotler et al., *Museum Marketing and Strategy : Designing Missions, Building Audiences, Generating Revenue and Resources*, (San Francisco: John Wiley & Sons, Inc., 2008); Enny Das et al, "Improving the Effectiveness of Fundraising Messages: The Impact of Charity Goal Attainment, Message Framing, and Evidence on Persuasion," *Journal of Applied Communication Research* 36, no 2 (2008); Richard D. Waters, "Measuring Stewardship in Public Relations: A Test Exploring Impact on the Fundraising Relationship" *Public Relations Review* 35, no 2 (June 2009); Adrian Sargeant et al, "Charity Brand Personality: The Relationship With Giving Behavior" *Nonprofit and Voluntary Sector Quarterly* 37, no 3 (2008).

<sup>33</sup> Sargeant and Shang "Clear Insights."

Hampton changed its fundraising strategies to focus on individual support, specifically alumni.<sup>34</sup> HBCUs have the same problems with board members as many other nonprofits.<sup>35</sup> Creating an energized and effective board is a challenge for many institutions. Dallas Heritage Village's board is effective but in any situation more can be done. Hospitals have the same outlook on patients as colleges and universities have on alumni. In the economic crunch hospitals are targeting former patients and their families more than ever.<sup>36</sup> Museums do not have these key demographics to target for contributions. They must rely on donors who connect to their mission and community involvement.

I found no published studies that analyze a core group of individuals donating to a single organization in my research. This could be because most institutions want to keep their donors to themselves. Many institutions participate in fundraising feasibility studies prior to embarking on a new campaign.<sup>37</sup> This project was possible because of the willingness of one historic village to allow access to their highest level of donors. Dallas Heritage Village was willing to do this in the hope of advancing our knowledge about nonprofit development in general, but also

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<sup>34</sup> Marybeth Gasman and Noah D. Drezner, "Fundraising for Black Colleges During the 1960s and 1970s: The Case of Hampton Institute," *Nonprofit & Voluntary Sector Quarterly* 39, no. 2 (April 2010): 321-342, 329.

<sup>35</sup> *Ibid.*, 338.

<sup>36</sup> Lindsey Getz, "In Tight Economic Times, Former Patients Become the focus of Fundraising," *H&HN: Hospitals & Health Networks* 82, no 11 (November 2008) 12.

<sup>37</sup> Martin Novom, *The Fundraising Feasibility Study: It's not About the Money.* (Hoboken NJ: Wiley, 2007).



in the hope that they will better understand their own particular development environment.

Most discussions about transforming historic house museums and historic villages are focused on interpretation of sites and objects to gain more visitors.<sup>38</sup> While it is important to revitalize interpretation and grow the audience, history museums must also connect with new and existing donors to fully revamp the organization and regain financial stability and popularity. The most important research for this study has come from making connections with donors. The public must connect with the past in order for them to care about making a donation. This connection with the past can be made through a connection with the museum. By concentrating on a specific group of donors as opposed to general theories of marketing and psychology this study will show the importance of personal connections in the fundraising world and especially within historic house museums and historic villages.

#### *Dallas Heritage Village: A Case Study*

Dallas Heritage Village has a long and rich history in North Texas, but like many nonprofits they are struggling in the current economy. While operations continue, they have been forced to make substantial staff cuts. The organization relies on the generosity of its donors and has a good relationship with many of them.

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<sup>38</sup> Carson "The End of History Museums" 2008; Harris *New Solutions for Historic House Museums* 2007

### *Dallas Heritage Village History*

Dallas Heritage Village has a long history that started with a few passionate people wanting to save a Dallas relic. The Millermore house stood as the largest remaining Civil War era home in Dallas. The possession of the home had fallen to a local church that wished to expand onto the land. A few passionate Dallas citizens fought to protect the house. They created the Dallas County Heritage and Conservation Society, which they later shortened to the Dallas County Heritage Society (DCHS). The organization was granted nonprofit incorporation in 1966. The group was able to raise the funds to save Millermore but needed a final resting place for the home. The Dallas Park Board offered City Park, a historic park just south of the downtown area, and after a few months in storage Millermore was reconstructed in City Park by spring 1968 and opened to the public in May 1969.

The next few years were filled with acquisitions and restorations. Ten structures were dedicated between 1968 and 1975. The bicentennial in 1976 marked a large celebration for DCHS. Four structures were dedicated at the ceremony bringing the total number of structures fourteen. The same year, DCHS was also able to hire its first director. Previously, DCHS had solely run on volunteer support. More structures arrived during the late 1970s and early 1980s. Curators of education and collections and a registrar were added during this time. In 1979 an endowment was established for the organization with a \$10,000 donation. During that same year the Meadows Foundation donated \$300,000 to DCHS for land acquisition and parking lot development. This is still the largest gift to date to the organization.

In 1982 DCHS, popularly known as Old City Park, became the third American Association of Museums accredited museum in Dallas. By this time the park had 25 dedicated structures and was providing memberships for \$15 annually and educating schoolchildren and visitors throughout the Dallas Metroplex. The 1980s brought about many traditions for Old City Park. Candlelight and Old-Fashioned Fourth became popular holiday celebrations. Candlelight is the oldest continuously running holiday celebration in Dallas. Also at this time, several security updates were made in the wake of vandalism and arson. The Board of Directors, which had in the past acted as an advisory board, was dissolved for the Board of Trustees used today.

By the early 1990s Old City Park had celebrated its 25<sup>th</sup> anniversary and volunteers had logged over 500,000 hours for the site. Old City Park was a popular field trip destination for schools. In 1995 Old City Park hired its current director, Gary Smith, and broke ground on the Chautauqua Pavilion. The pavilion opened up Old City Park to more rentals and special events income. In the same year the Curator's Circle was created to represent the highest level of membership for the site.

The new millennium brought new changes for Old City Park. The September 11, 2001 terrorist attacks affected park attendance just as with most museums around the nation. Candlelight saw a rise in attendance that year as people were trying to reconnect with traditions. In 2003 the board approved plans for an Education and Visitors center. The campaign started out with a board-only campaign to raise funds. By 2004 the Board had pledged record numbers and the

campaign went public. In 2005 the first “Gone to Texas” fundraising gala was held. The event brought in many contributions each year and allowed for new people to become familiar with the museum. The same year the Board voted to change the name of Old City Park to Dallas Heritage Village at Old City Park. The new name better demonstrates the mission and emphasis of the organization.

Today Dallas Heritage Village is feeling the economic crunch along with the rest of the country. The staff works tirelessly to care for the historic homes and the collection. Candlelight and Gone to Texas are still popular events at Dallas Heritage Village.

#### *Dallas Heritage Village Finances*

Dallas Heritage Village has a long history of successful fundraising campaigns. The concerned volunteers who started the organization were able to raise enough funds to save Millermore in a very short period of time. The fundraising techniques and finances have evolved over the years with the organization.<sup>39</sup>

Today Dallas Heritage Village relies on a wide variety of funding from several different sources. Dallas Heritage Village is partially funded and owned by the City of Dallas through the Office of Cultural Affairs. The City owns the land on which the museum resides. Each year approximately 15% of Dallas Heritage Village’s annual budget comes from City funds. The City of Dallas has a management agreement with

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<sup>39</sup> All financial information is taken from the 2008-2009 Dallas Heritage Village Annual Report and Dallas Heritage Village Trustee Manual Smith, Gary. “Financial Interview,” February 28, 2011.

Dallas Heritage Village to manage the property and buildings. The City of Dallas owns the buildings but Dallas Heritage Village must pay for much of the restoration and maintenance of them. Dallas Heritage Village owns the furnishings and artifacts in the collection. The City of Dallas is dealing with the same economic hardships as many other local governments. With each budget cut arts organizations are usually the first to feel the pinch. When economic times are hard cuts happen and when they are good funds are stable. Once the city makes a cut it stays, Dallas Heritage Village will, most likely, never get a pay raise from the city.

Although these losses affect Dallas Heritage Village they have many other ways of securing operational funds. Museums around the nation rely on funding from all levels of government. The National Endowment for the Arts, Institute of Museum and Library Services, and the National Endowment for the Humanities provide grants throughout the year for special projects. These national agencies are also dealing with budget cutbacks at the federal level. Although national agencies provide funds to museums most government support comes from the local level. It is much easier for a local government to assess the value of a museum in their community. Local government can see firsthand the impact the museum has on tourism, education and community development.

Earned income is an important facet of any museum's budget and Dallas Heritage village is no different. DHV has a museum store and a rental property adjacent to the grounds and the park is available as a rental space for special occasions. The rental property is currently being leased to a taxi company. This property generates around 10% of the total revenue for DHV. The rental property is

an interesting way to gain revenue for a museum. The space is separated from the park and owned by the museum not the City of Dallas as with the rest of the grounds. The museum store generates less than 5% of the total revenues. The store has been a fixture of DHV for quite some time, even opening a branch in NorthPark Mall during the holiday season of 1987.<sup>40</sup> Park use fees such as admissions and rentals for special occasions make up around 10% of DHV's total revenues. Rental space has become an important element in museum income. Most museums advertise their space for use in weddings and other gatherings even devoting special staff positions to this task. All total DHV's earned income totals around 25% of their total revenues.

Throughout the year Dallas Heritage Village also holds special events. These include Candlelight, Girl Scout Day, and Old Fashioned Fourth of July. These events generate community involvement and attract new audiences to Dallas Heritage Village every year. The events are not only a revenue booster but also a marketing tool. Around 15% of the total revenues are generated from these events but the marketing benefit adds to their importance for DHV.

Memberships account for around 10% of the total revenue. Memberships are an important way for people to contribute to museums. The lowest level of membership costs \$60 annually while the highest, the Curator's Circle, must contribute at least \$1,250.<sup>41</sup> In most cases, the responsibility for tracking and cultivating high-level memberships falls to the development department. Larger

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<sup>40</sup> *Milestones over 40 Years*, Dallas Heritage Village Publication, (2006).

<sup>41</sup> *Membership*, Dallas Heritage Village Brochure, (2010).

museums with a larger staff can delegate low-level memberships to the visitor services department. Lower-level memberships are a good way to generate lasting connections to the institution. Lower-level members often take advantage of the free admission and visit often. Dallas Heritage Village's membership program has been active for many years and generates around 10% of the total revenue but high-level members also make individual contributions to campaigns and serve on the Board of Trustees.

Members can typically fall into another category: donor. Contributions account for almost 35% of Dallas Heritage Village's total revenue. Without these contributions DHV would not be able to keep their doors open. With budget cuts from the city coming steadily every year, DHV relies on contributions more than ever. It is important for these relationships to remain strong and staff and trustees cultivate new donors to keep the organization on track.

Dallas Heritage Village currently uses a wide array of fundraising techniques. The Mary Aldredge Society is a group of individuals who have left provisions for DHV in their wills. Mary Aldredge was a former Dallas First Lady who was one of the original champions of Dallas Heritage Village. She was instrumental in saving Millermore in the late 1960s. Currently there are less than 15 people in the society. DHV does not request any formal paperwork to verify the provisions. It is up to the individual to notify DHV of their plans.

## *Methodology*

This project came about out of an interest in fundraising and development. Gary Smith volunteered his institution for this project due to his involvement with the Museum Studies Department at Baylor University. He is a Visiting Lecturer for graduate administration courses. During the planning stage of this project, it was decided the research would consist of interviews with upper-level members of Dallas Heritage Village. It was logical to use members of the Curator's Circle. The Curator's Circle is the highest level of membership at DHV. Curator's Circle members must contribute at least \$1,250 to DHV annually. Within the Curator's Circle there are different levels. The Gold Curator level requires a \$2,500 contribution and the Platinum level requires \$5,000. Former Texas First Lady Rita Clements and Betty Josey founded the Curator's Circle in 1995 to celebrate the 150th anniversary of Dallas County and the 30th anniversary of the Dallas County Heritage Society. Benefits of the Curator's Circle include, but are not limited to, free admission to DHV, discounts to the Museum Store, two Curator's Circle receptions, and annual report recognition.<sup>42</sup>

After determining the participants in the project, two sets of questions were developed. It was decided that all Curator's Circle members would be invited to participate in an online survey using Survey Monkey.<sup>43</sup> This survey consisted of seven questions with the last question asking whether the respondent would be

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<sup>42</sup> *The Curator's Circle*, Dallas Heritage Village Brochure.

<sup>43</sup> SurveyMonkey is an online survey-making tool. This site tracks and organizes the data for the researcher.



willing to participate in the in-person interview.<sup>44</sup> If they answered yes, they were asked to give their name in order to be contacted by the author for scheduling. The second phase of questions was also determined at this time. The interviews were scheduled to last no more than 30 minutes. The interview consisted of nine open-ended questions.<sup>45</sup> The interviewees were also asked if they had any last thoughts on development or the process at the end of each interview.

Before the author notified the participants about the project, Gary Smith sent an email. Mr. Smith explained the project to the participants and asked for their cooperation and participation. He noted the author was working closely with DHV but all identifying information would be kept from DHV staff during the process. Three days later the author sent an explanatory email to the participants outlining the different phases of the project and its purpose. The author also explained the lengths to be taken to protect their privacy. Emails were sent to 53 individuals requesting their participation in the project. The online survey was open for 2 months, allowing adequate time for participants to complete the survey although the author requested that the survey be completed within a week of its receipt. Twenty of the 53 contacts completed the survey.

The author personally emailed those participants wishing to participate in the in-person interview. Meetings were scheduled during normal work hours and interviews were conducted in homes, places of business and public spaces. No interviews were conducted on DHV property. One interview was done over the

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<sup>44</sup> See Appendix A

<sup>45</sup> See Appendix B

phone due to scheduling conflicts. In total nine in-person interviews were conducted. All interviewees were asked the same questions as well as if they were past or present members of the DHV Board of Trustees. All of the interviewees had some level of board involvement either currently serving on the board or a former board member. Most interviews lasted 30 to 45 minutes; one interview lasted over one hour and one lasted only 20 minutes. The demographics of the donors only seemed to vary by gender. Four men and five women were interviewed. All were Caucasian and over the age of 40. All interview participants were sent a follow-up email thanking them for their time and reminding them that the author was available if they had any questions or comments regarding either phase of the questioning. No responses were given to this prompt.

## CHAPTER THREE

### Results and Conclusions

#### *Results*

The discussion of the results has been broken into two sections. First, the results of the online survey will be discussed and qualified. The in-person interviews will be discussed in a later section because of the nature of the responses and the difficulty of quantifying the open-ended responses.

The number of responses to the online survey was very surprising. Mr. Smith had stated before that DHV had not had much success with online surveys in the past. The survey was sent to a total of 53 participants with 20 completing the survey. This is a 35.85% response rate. Among those 20 respondents, 9 agreed to be interviewed in person. In-person interviews were conducted with 16.98% of the survey group. Mr. Smith stated that DHV usually has around a 10% response rate on surveys sent out to membership.

When the responses of individual questions of the online survey are tabulated the results are as follows:

*Question 1: Did you contribute to the Capital Campaign for Dallas Heritage Village in 2009?*

DHV held a capital campaign in 2009 to raise money for renovations and parking lot reconstruction. The goal of the campaign was to raise funds in order to build a new visitors center to accommodate more school groups. The funds would also be used to close Gano Street, a through street that intersects DHV grounds, fence the perimeter, build an outdoor amphitheater, and create a safe area for school bus loading and unloading. Some funds would also go towards strengthening the endowment. DHV wanted to raise at least \$4.2 million dollars to complete all of these projects.<sup>46</sup> After a yearlong campaign the effort was stopped. The total amount raised was \$2.8 million: \$1.8 million from donations and \$1 million from City of Dallas bond funding. Most of the funds raised for this campaign came from generous trustees with some outside donations.<sup>47</sup> Obviously, DHV was not able to raise all of the funds for the new visitors center and amphitheater but they were able to close Gano Street, create more parking, relocate the utilities underground, and fence the perimeter of the property. Most importantly they were able to create the safe school bus drop-off point and a more distinct entrance off of Harwood Street.

For the online survey of the twenty respondents, sixteen said they had contributed to the Capital campaign in 2009; four said they had not contributed. With any capital campaign an organization would hope to have the support of its

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<sup>46</sup> "Opening the Doors to History: A Case Statement." Dallas Heritage Village, May 2008.

<sup>47</sup> "Opening the Doors to History: The Foundation Phase of Dallas Heritage Village's Expansion Project." Dallas Heritage Village, 2010.

high-level members and its Board of Directors. The involvement of these key groups lends credence to a campaign.<sup>48</sup> This will be discussed more in-depth later in the report.

*Question 2: Did you visit Dallas Heritage Village last year for reasons other than attending a meeting? If so, how many times?*

High-level memberships are an important part of fundraising but it must not be forgotten that these participants are members of the museums. One of the benefits of a membership is free entry into the park. Museums want their members to visit or else they would not provide free entry. Most respondents said they had visited Dallas Heritage Village in the last year: 25% said they had visited once while another 25% visited twice, 15% claimed they had visited three or more times. The largest response group, 35% did not visit DHV last year. The level of donor visitation shows their commitment to Dallas Heritage Village and that they enjoy visiting outside of board requirements.

*Question 3: Do you consider yourself to be a volunteer as well as a donor? If so, how often did you volunteer at Dallas Heritage Village in the past year?*

Many of Dallas Heritage Village's contributors have been committed to its mission for many years. Members of the Dallas Heritage Village Guild volunteer their time and assist with fundraising efforts through luncheons and a bake sale during Candlelight. Contributing to an organization does not just mean giving money. A donation of time or services can be just as valuable to an organization.

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<sup>48</sup> Wolf, Thomas. *Managing a Nonprofit Organization in the Twenty-First Century*. Rev. and updated, Fireside ed. New York: Simon & Schuster, 1999. 57

Many contributors also use their knowledge of other fields, such as accounting and law, to assist DHV. For this survey 25% responded they do not consider themselves to be a volunteer as well as a donor. More participants in this survey do consider themselves volunteers at some level: 20% donated 1-5 hours, 10% donated 6-10 hours, 20% donated 11-20 hours and 25% donated more than 20 hours last year.

*Question 4: On a scale of 1-10, how important to you is donating to Dallas Heritage Village?*

This question developed due to of the level of competition for funds in Dallas. Dallas is a large city with lots of fundraising potential. Dallas Heritage Village has to compete with many other nonprofit organizations for funds. Dallas Heritage Village's ranking shows the dedication of the current donors and their willingness to continue contributing. Participants were given a 1-10 scale to rank Dallas Heritage Village; with one being DHV is the least important organization the participant contributes to and 10 being the most important. The average rating was 6.05.<sup>49</sup> This means the Dallas Heritage Village is slightly more important than other organizations. No one responded that DHV is the least important organization they donated to but only one respondent said the DHV was the most important organization. This was the only question skipped by a participant.

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<sup>49</sup> See Table 3.1 for full results

Table 3.1

On a scale of 1-10, how important to you is donating to Dallas Heritage Village?												
Answer Options	1 (Least important organization I donate to)	2	3	4	5 (Just as important as all of the other organizations I donate to)	6	7	8	9	10 (Most important organization I donate to)	Rating Average	Response Count
Importance	0	0	2	1	5	5	2	1	2	1	6.05	19
<i>answered question</i>											19	
<i>skipped question</i>											1	

*Question 5: Does the donation process at Dallas Heritage Village rank as more enjoyable or less enjoyable compared to other institutions you contribute to?*

Because of the level of competition discussed earlier Dallas Heritage Village must provide the best service from its development department. DHV has a relatively small development department with one full-time and one part-time staff member. Mr. Smith as well as all staff members assist with development, for their individual departments and the organization as a whole. This question was given a response scale of 1-5 with one being the donation process is less enjoyable than another institution and 5 being more enjoyable. Every participant answered this question positively. The average rating was 3.40 meaning the participants believed that working with Dallas Heritage Village is slightly more enjoyable than working with other organizations.<sup>50</sup>

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<sup>50</sup> See Table 3.2 for full results



Table 3.2

Does the donation process at Dallas Heritage Village rank as more enjoyable or less enjoyable compared to other institutions you contribute to?							
Answer Options	1 (Less Enjoyable)	2	3 (Same level of enjoyment)	4	5 (More enjoyable)	Rating Average	Response Count
Enjoyment	0	0	14	4	2	3.40	20
<i>answered question</i>							20
<i>skipped question</i>							0

*Question 6: How many other cultural/arts institutions in Dallas do you contribute to on an annual basis?*

Staff at Dallas Heritage Village was interested in information regarding the level of competition not only among other nonprofit institutions in Dallas but specifically among other cultural or arts organizations. With so many other arts organizations in Dallas the competition for those dollars becomes even more important. Research has shown those most likely to give to cultural organizations are older, highly educated, and wealthy, while people of all variety are likely to donate to medical or social causes.<sup>51</sup> This categorization lowers the expected donor population. It is important to understand the level of competition so the staff can take appropriate measures. With this survey 75% of the respondents donate to at least one other cultural institution with 25% donating to six or more.<sup>52</sup>

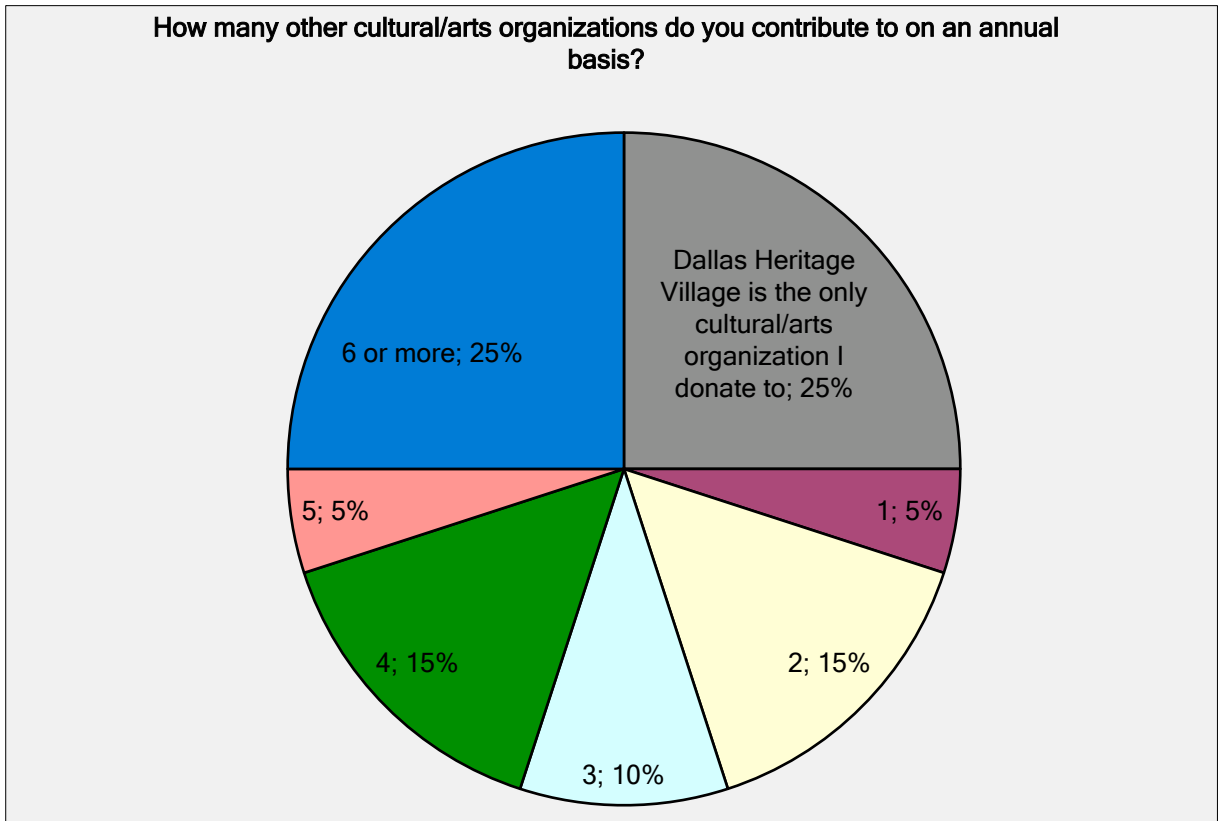
The seventh question was used to determine who would be willing to participate in the in-person interviews. Respondents were asked to give their name if they were willing to participate. Almost half of the respondents were willing to conduct an in-person interview.

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<sup>51</sup> Sargeant, and Jay. *Fundraising Management* 2010, 97-100.

<sup>52</sup> See Chart 3.1 for full Results

Chart 3.1



The responses solicited from the in-person interviews were interesting. The ultimate goal of the interviews was to solicit information that DHV could use to gain a better understanding of their development process from the donor perspective. Overall, the donors had a positive outlook on Dallas Heritage Village. This is not surprising. A donor must be satisfied that the organization to which they are contributing will act responsibly and within the parameters of their mission.<sup>53</sup> In order to understand donors professionals must understand the importance of connections within fundraising and development.

*The effect of personal connections and relationship building*

To begin the cultivation process an organization must have a target. This target must be of use to the organization. Targets are chosen based on thorough research done by the nonprofit organization.<sup>54</sup> It is important to include the Board of Trustees in the research process so they can see the entire process the development office must go through in order to gain one new donor. Whatever the reason a donor is targeted the nonprofit must decide the best way to approach him/her. In most cases the staff would ask if any of their current board members feel comfortable approaching the target or introducing the organization. This is where the importance of connections comes into view. All of the donors interviewed

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<sup>53</sup> Sargeant and Jay, *Fundraising Management*. 164.

<sup>54</sup> *Ibid.*, 174.

for this project explained how they first became involved with Dallas Heritage Village. In most cases their introduction to the organization was through a friend, colleague or family member. One donor described himself as “reactive.” He only donates to organizations that seek him out through a personal phone call from a friend close to the organization. He and his family rarely seek out new opportunities for philanthropy. Another donor explained that he became involved when he was tapped to become a board member by a former board president. The two had been friends for some time and the interviewee trusted the judgment of his friend. The interviews highlighted the dramatic importance of personal connections in attracting new donors to DHV. Current donors and board members are great tools to attract a new donor pool because they already have a network of friends and colleagues that trust them.

Retention rates also demonstrate the importance of connections. As stated before most of the interviewees have been involved with DHV for many years. They have built a connection to the institution, its mission and staff. One donor stated he has stayed involved because the institution proved itself worthy from the beginning of the relationship. DHV has stayed true to its mission and he appreciates the care put in by the staff. Another donor has a long family history with the organization. She sees it as a part of her family and her history. This deep connection to the institution created by a lifelong association is strong. Not only is there a connection amongst the interviewees to the institution but also to its staff.

All of the interviewees praised the staff and their hard work. Five of the nine participants cited Director Gary Smith as a key reason why they continue to donate

to the organization. Mr. Smith and his staff make the donation process smooth. Many see the organization as more attentive due to the size of the organization. This is also shown in the results from the online survey; respondents said that DHV rates as slightly easier to deal with than other organizations. Smith himself often speaks of knowing his donors on a personal level outside of DHV. Donors praised Dallas Heritage Village for their level of commitment to donors. This level of commitment is not the case at all nonprofits. Richard Waters suggests that donors and fundraising professionals are not usually on the same page when it comes to important factors in their relationships. Trust and openness proved to be the most important to donors. Waters cites several scandals amongst national charities for the perceived lack of openness.<sup>55</sup> Waters also found that donors want more information than nonprofits typically provide. Donors want to know exactly where their money is going and how their donation affects the organization. He concluded that more communication with donors is needed.<sup>56</sup> Dallas Heritage Village excels in this area. Their small staff can cultivate individual donors properly in order to form lasting connections and retain donors.

Connections must be cultivated through relationship building. Relationship building is one of the most important aspects of fundraising. Many marketing models exist to define relationship building in nonprofit fundraising. Patricia Knowles and Roger Gomes use ideas from several marketing models to determine

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<sup>55</sup> Waters, "The Importance of Understanding Donor Preference and Relationship Cultivation Strategies," 2009, 327-346.

<sup>56</sup> Ibid., 341

the strengths of their own model.<sup>57</sup> They proposed a distinct set of steps to develop relationships that lead to a major-gift donation. They claim their model leads to better understanding of the solicitation process and how to build a stronger relationship with the donor.<sup>58</sup> In order for the model to be successful the fundraising professional also has to be successful. Each step in the model leads to another so none can be skipped or unsuccessfully executed or the model disintegrates. The model also relies on the willingness of the potential donor to participate. If the potential donor cannot be convinced from the beginning, he/she will not contribute to the organization despite being familiarized with its mission and purpose.

In a different study Waters suggests that the need for relationship building is paramount in the fundraising process. Donors appreciate “reciprocity, responsibility, reporting, and relationship nurturing.”<sup>59</sup> In her book, *Donor Centered Fundraising*, Penelope Burk explains the need for donors to be treated like people, not like ATMs. Giving is an emotional act and must be met with personal contact, not automated responses.<sup>60</sup> Burk calls for a more effective interaction with current

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<sup>57</sup> Knowles and Gomes “Building Relationships with Major-Gift Donors” 2009, 384-406.

<sup>58</sup> Ibid., 390

<sup>59</sup> Waters “Measuring Stewardship in Public Relations” 2009, 113-119.

<sup>60</sup> Burk, *Donor-Centered Fundraising* 2003.

donors versus trying to acquire new ones.<sup>61</sup> It is general knowledge that obtaining a second or repeated donation is easier than soliciting a new donor.

### *Donor motivations and how they affect priority lists*

Because donor relationships are essential to the fundraising process we must understand the motivation for donating. Adrian Sargeant asked “Why do people give?” in his book *Fundraising Management*. He listed a variety of reasons from guilt to recognition, sympathy to social justice.<sup>62</sup> Many people use self-interested motivation when donating. This could include in memoriam donations, donations to receive tax credits, and donations for access to services.<sup>63</sup> Sympathy and empathy are also key factors in donations. Most see a donation as a selfless act but at the core every donor expects something in return even if it is just for their money to be used effectively.<sup>64</sup>

Donors interviewed for this project often referred to the feeling of goodwill that comes with making a donation. The donors want to feel they are contributing or giving back to the greater Dallas community and see philanthropy as one of the best ways to help. This is a result of empathy. Empathy-motivated donors want to see the emotions and changes from a donation. They take joy in being a part of something

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<sup>61</sup> Ibid., 23

<sup>62</sup> Sargeant and Jay, *Fundraising Management*, 2010.

<sup>63</sup> Ibid., 101

<sup>64</sup> Kotler et al., *Museum Marketing and Strategy*, 2008.



that helps others. One donor mentioned that the “giver is rewarded much more than the receiver.” According to a November 2005 *New York Times* article, empathy is key for a successful fundraising campaign. Americans have an easy time putting themselves in others shoes.<sup>65</sup> This is often a tried and true method for fundraisers. When a potential donor can identify with a group or organization they are more likely to donate.<sup>66</sup> Although in times of crisis a great deal of money and time are funneled half way around the world to assist in the relief effort, most of the philanthropic effort is not only domestic but local.<sup>67</sup> This is why community ties are so important to nonprofits today if they want to be successful.

Some of the interview participants saw philanthropy as imperative in today’s society because of the lack of government funding to nonprofits and social services. Donors identify and respond to the needs of the community. One donor stated she donates to organizations the “feed human beings physically, emotionally and spiritually.” Another donor mentioned that it is his “duty” as a person with wealth to give back and provide meaningful experience not only for others but also for himself. He also uses philanthropy to teach his children the value of helping others. He is raising his children to have knowledge of the world around them and understand that not everyone comes from a world of privilege. DHV can create these “teachable moments,” as the donor put it, for its donors by recommending to them to bring children and grandchildren to the museum and explain why they donate to

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<sup>65</sup> Richard Friedman, “Behind Each Donation, a Tangle of Reasons,” *New York Times*, November 14, 2005.

<sup>66</sup> Payton and Moody, *Understanding Philanthropy*, 41

<sup>67</sup> *Ibid.*

DHV. Donors need to associate DHV with feelings of goodwill to expand on the connections with donors.

Every donor interviewed mentioned the importance of the education programs for school children at Dallas Heritage Village. All viewed these programs as the most important job of Dallas Heritage Village. The sight of children in the museum exploring early Dallas life provides the motivation for one donor to contribute. They all believe the museum is important because of the impact the space can have on today's children. The reliance on technology, as one donor put it, has allowed our children to become desensitized to the past. DHV brings the past into perspective and grounds them within the community and maintains context for the present. One donor stated that DHV makes history easier for the children to understand and allows them to learn and explore without the restrictions of a classroom.

Donors also see the need for Dallas Heritage Village in the city. Although there are several history organizations in the city, Dallas Heritage Village is the only institution with a living history component and the only one that interprets history through historic structures in "the shadow of steel and glass" as one donor phrased. One participant pointed out that Dallas strives for innovation and focuses on technology and the future without taking enough time to look back. The participants grasp the importance of the city's history and this keeps them donating to Dallas Heritage Village.

## *Conclusion*

The results of this project demonstrate the importance of connections and relationship building on fundraising and development at Dallas Heritage Village. In order to build on this knowledge and make good use of it, board involvement in the fundraising process needs to be examined. It was mentioned earlier that every interviewee had some level of board involvement with DHV. The Board of Trustees plays a key role in the fundraising process through their connections with peers and the institution. Board involvement in the fundraising and development process should be expected. Individuals on the board should be enthusiastic about the organization and show support with their time, effort, and funds.<sup>68</sup> When speaking about board involvement at DHV several of those interviewed mentioned that the board could be doing more to support Dallas Heritage Village. All board members need to understand the value that they bring to the organization outside of the funds they contribute annually. Board members have knowledge of the community and personal connections that should be used to benefit the organization. Members should be providing names and contact information for prospective donors.<sup>69</sup> Many board members do not feel comfortable asking peers for money but they can participate by introducing a prospective donor to the organization and the allowing the development staff to take over. It was suggested by two different participants

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<sup>68</sup> Thomas Wolf, *Managing a Nonprofit Organization in the Twenty-First Century*, (New York: Simon & Schuster, 1999), 57

<sup>69</sup> Karen Brooks Hopkins and Carolyn Stolper Friedman *Successful Fundraising for Arts and Cultural Organizations*, 2nd ed. (Phoenix AZ: Oryx Press, 1997).

that DHV needs to be recruiting more high-profile trustees, but it can be hard to break into those circles. A High-profile person does not always mean a local celebrity. First, current trustees need to look close to home. A trustee does not always know the types of connections their neighbors might have with high wealth individuals. While getting pie-in-the-sky donors is always nice there are other less famous, but still wealthy, individuals that can be tapped. Donor prospecting is a long process that relies on assistance from current trustees.

All of the participants in the interviews were middle-aged and older. One of the participants, a forty-something, mentioned they are one of the youngest involved with the organization. By drawing in younger trustees the organization could create a new generation to carry Dallas Heritage Village into the future. The Board of Trustees needs to take a hard look at recruitment of younger trustees in order to concentrate on the bigger picture. There should also be a dialogue about current staff. All of the participants raved about the staff and their commitment to the organization. Several cited Mr. Smith as the driving force behind DHV's continued stability in current economic hard times. But what will happen when key staff members leave the organization? When staffing in the future the Board of Trustees will have to pay great attention to the personal dynamics of the organization since it is so heavily relied on currently.

All historic house museums and villages need to be thinking long-term about the stability of their organizations. Luckily, Dallas Heritage Village has both a devoted staff and donors who work tirelessly to promote and care for the museum and its historic structures. Fundraising and development within these organizations

need to be studied more in-depth to begin grappling with the high cost of caring for historic house museums and villages. This project only looked at one historic village and its donors but the study of fundraising with historic house museums should be continued.

## APPENDICIES

## APPENDIX A

### Online Survey Questions:

1. Did you contribute to the Capital Campaign for Dallas Heritage Village in 2009?
2. Did you visit Dallas Heritage Village last year for reasons other than attending a meeting? If so how many times?
3. Do you consider yourself to be a volunteer as well as a donor? If so, how often did you volunteer at Dallas Heritage Village in the past year?
4. On a scale of 1-10, how important to you is donating to Dallas Heritage Village?
5. Does the donation process at Dallas Heritage Village rank as more enjoyable or less enjoyable compared to other institutions you contribute to?
6. How many other cultural/ arts institutions in Dallas do you contribute to on an annual basis?
7. Would you be willing to participate in a face-to-face interview lasting around 30 minutes to discuss your thoughts on the donation process as part of a Master's project for a Baylor University graduate student? All responses will be presented as anonymous in the report and your privacy will be protected.

## APPENDIX B

### In-person Interview Questions:

1. What do you believe is the role of philanthropy in today's society? Why is it important to you?
2. What is your process for making decisions on which nonprofit groups to contribute to each year?
3. What is your main motivation for contributing to the organizations on your priority list?
4. Why do you contribute to DHV?
5. What is the most important activity or program at DHV?
6. Why is Dallas Heritage Village important to the greater Dallas community?
7. What would you tell your friends about DHV?
8. How do you compare the priority of social conscience organizations (i.e. homelessness, poverty, children's welfare) to arts/culture organizations (i.e. museums, opera, symphony)?
9. How would you rate the donation process at DHV in comparison to other nonprofit organizations to which you contribute? Easier, more difficult, no difference? Why?



## APPENDIX C

### Raw Interview Data

This document can be found on BearDocs (<http://beardocs.baylor.edu>) under the file name `lisa_simpson_rawdata.pdf`

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