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8 Digital Outreach in Museum Development Strategies

Jean-Michel Tobelem and Marie Ballarini

Introduction

For decades, American, Canadian and British museums have been developing ambitious policies for raising funds from private donors, foundations and corporations, and at the same time creating membership programmes allowing many people to support museum activities through financial contributions of varying amounts, depending on their level of interest and financial means. Now museums in many countries are trying to mobilise private donations to complement their two traditional sources of funding: public subsidies and earned revenues generated by various sources (ticket sales, shops, restaurants, space rentals, etc.). These two types of funding models (those influenced by the North American and British museum traditions and others) now have something in common: the emergence of digital technology in all museum activities, from mediation to administration, communication and, of course, fundraising. But how does that translate into a museum's ability to raise funds? And what type of organisation can facilitate fundraising policies?

The Rise in Digital Communication

Methods for reaching potential donors have multiplied in recent decades with the rise of the Internet, social media and digital communication. But the old tools (post, telephone and e-mail) are still in use. New media exist alongside old media. In other words, each medium meets a specific need or specific mode of consumption. But the creation of new media offers new opportunities and increases the possibilities for delivering messages, collecting information and reaching out to potential donors.

This may complicate strategy development for fundraising managers, but it also makes it possible to adapt to donor characteristics based on three main criteria: their age, ability to contribute, and use of social media. It goes without saying that major donors should continue to be approached individually by their peers, while a text or Facebook message is more appropriate for reaching large numbers of donors for smaller donations (Kotler *et al.* 2008). The challenge is determining the optimal combination of communication channels depending on the type of donor and

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donation involved. To do so, several factors must be taken into account: the donor's socio-demographic profile, their interests, their active presence on one or more social media platforms (Facebook, Twitter/X, Instagram, YouTube, LinkedIn, etc.), and above all, their past relationship with the museum and any previous financial contributions. For example, a volunteer, member or 'friend' of the museum may be more willing to financially invest in the museum's activities.

Universcience (an institution combining the Palais de la Découverte and the Cité des Sciences et de l'Industrie in Paris, France) conducts an annual fundraising campaign by post. Universcience allows donors to donate online, but many of its donors (mainly late-career or retired science enthusiasts) still choose to send a donation by cheque. In an effort to reach out to younger donors and communicate with a new audience specifically interested in new technologies, Universcience launched a crowdfunding campaign in 2017. Using these two tools, with two different target audiences, does not lead to a 'cannibalism' of donations, with one type replacing another. Instead, the annual campaign helps fund the museum's operations and goals by targeting those who have been fans of the museum for years, while the online campaign is a one-time effort that reaches a new audience, facilitates communication with the media, and focuses on a specific project.

Development staff must adapt the content of their solicitation messages to the characteristics of the social media platform they are using so that the fundraising message blends in with the thread of communication between the museum and its audience. Thinking that the immediate contact with the public made possible by social media can replace traditional fundraising techniques would be a mistake. It is still essential to spark potential donors' interest in the institution, to tell them how their donation will allow the museum to develop important and exciting activities and to create a lasting relationship before and after a donation is made.

Adapting the Message to the Medium

Regardless of the medium (newsletter, blog, Facebook, Instagram or Twitter/X) it is important to highlight the quality of the museum's programmes and its ability to offer new ones based on the funds it collects. Of course, as with any fundraising policy, two phenomena come into play: a large number of small and medium donations, which will make up in most cases a significant part of the fundraising objective, and a smaller number of large donations, which also make up a substantial part. One cannot exist without the other. Small and medium donations reflect the community's attachment to the museum, while large donations reflect its ability to mobilise major philanthropists and large foundations. These sources of larger donations are also solicited by various local institutions, such as universities, hospitals, other cultural institutions (libraries, orchestras, operas, theatres, etc.), humanitarian organisations, and sports clubs (depending on national laws on donations).

Therefore, with the help of social media, it remains essential to show the museum's singular value to the community as a whole and to each potential donor in particular. What contribution will the museum's new wing make to education? How will the new museum layout make the city more attractive to tourists? How will

programmes outside the museum attract new visitors, etc.? The aim is to use a variety of fundraising channels while ensuring the museum is in control of them all. In that regard, the larger and more professional the museum's fundraising team, the wider the variety of fundraising options it can offer.

The Benefits of Social media

The benefits of social media compared to traditional fundraising tools are threefold:

- Responsiveness and the ability for instant communication, which makes it possible to quickly provide any information that may interest the audience following the museum's news;
- Interactivity, which makes it possible to receive comments from message recipients, who are themselves invited to forward the message by sharing it with their contacts, taking advantage of the viral nature of this kind of communication and
- Customisation, which facilitates the effective communication of targeted messages corresponding to the interests and concerns of the museum's contacts.

Finally, it is important to remember to collect information on users' wishes, needs, suggestions and interests. Statistical data provide valuable information for understanding a message's impact.

The thoughtful use of social media requires several steps:

- 1 Select a limited number of social media platforms the museum would like to use regularly, in proportion to its human resources. If the number is too large, many of its accounts will remain inactive, giving the museum a lasting negative image.
- 2 Design attractive content to be published on the social media platforms that the museum chooses to invest in first, depending on their format (text, image, video, etc.). Each platform has its unique characteristics, and ideally, content should not just be posted identically on every platform. Facebook is widely considered as useful. Twitter/X allows users to respond easily and participate in events like #museumweek; Instagram reaches a younger audience, etc. These tools are platforms through which Internet users can interact with the museum, so it is important to respond whenever possible and create personal connections, which play a decisive role in a fundraising campaign.
- 3 Identify individuals who will receive fundraising solicitations.
- 4 Send targeted messages to individuals who have agreed to receive such messages from the museum. In this regard, the museum staff must ensure compliance with national regulations on Internet users' rights, correcting information, deleting accounts and cancelling newsletter subscriptions.
- 5 Develop a policy to maintain the loyalty of new donors, with the aim of keeping them as contributors in the future and encouraging them to gradually increase the amount of their donation over the years. Someone who donates 20 EUR the first year, for example, may subsequently donate 50 EUR, then 100, and

then perhaps even 250. In this regard, benefits play a significant role, because if donors appreciate the benefits they receive for a 50 EUR donation, they will likely be willing to donate a little more the next time in order to receive even bigger benefits and an even closer relationship with the museum. This approach, however, works best mainly with relatively small donations. For bigger donors, attractive benefits (which are effectively negligible compared to the amount of the donation) will have less of an impact. Their motivation lies more in their personal relationship with the development department, curators or the museum's leadership.

What Benefits Should Be Offered to Donors?

As with any loyalty programme, maintaining a donor's attachment requires offering them benefits commensurate to the amount of their donation. Depending on their interests, these could include exclusive access, privileges or other special benefits. This confirms the need to get to know the donor, understand their needs and try to accommodate their wishes, in order to offer tailored, non-standardised benefits. Wrongly assuming donors' motivations would lead to a loss of resources for the museum and disappointment on the part of the donor, who may feel that their unique characteristics were not taken into account.

Online fundraising is growing rapidly, even though it represents a minority of the total amount collected from private donors (individuals, foundations and companies) (Ballarini 2019). Online donation amounts increased significantly during the pandemic. But in any case, it is important to remember that large donations are made by one person to another person, making the interpersonal aspect essential. And even if online donations may lead one to hope that it would be possible to skip the important work of 'cultivating' donors, convincing them of the cause, regularly informing them of the museum's projects and soliciting their feedback, this is not the case in practice (Ballarini 2020). While it is possible to collect many small and medium donations online, relationships with major donors continue to be based on personal trust. Depending on the size of the museum, donors could be provided with the option of donating by text message, on the museum's website, through a donation platform, or through a specific mobile application.

Each medium has its specific costs (such as subscriptions, commissions or fees) that must be measured and considered when choosing which donation tool to use. They can also be combined, on a one-time or sustaining basis. A museum can also use the same tool differently depending on what it wants to publicise. The Musée du Louvre, for example, uses its online donation site four months out of the year for its *Tous Mécènes* campaign, during which donors can donate only to that year's specific project. The rest of the year, website visitors can use the online donation system to give to the cause that speaks to them most, such as maintaining the Jardin des Tuileries, restoring artworks, developing educational projects, etc., depending on their interests.

With online donations, a museum must have an online collection system that is effective, easy to use, secure and, if possible, connected to Customer Relationship

Management (CRM) software. But once again, beware of the illusion of the ease of technology. Using software that meets the museum's needs takes time for the various departments involved to understand, learn and collaborate on, requiring an organisation that is as 'horizontal' as possible, as opposed to an organisation where everyone works in isolation. There is therefore a significant cost to installing a CRM tool that goes beyond the simple acquisition of the technological solution. There are also costs for training, update and maintenance, and especially for mobilising internal human resources, which include many more people than those in the IT or Development departments.

Digital Fundraising Methods

The simplest online fundraising method consists of allowing Internet users to give directly on the museum's website, using a specially designed button. Such ease of use is advantageous, but the role of the development and communication departments is to encourage website visitors to use the feature, because fundraising will not happen on its own. A logical approach should be followed consisting of identifying segments of potential donors to target first, developing an attractive, convincing message, offering a range of attractive, proportional benefits, and ensuring the user-friendliness of the website to facilitate donations.

Another online fundraising method consists of leveraging the viral nature of digital communication, particularly through social media. In this case, the museum should develop a powerful message, using a video, for example, ideally delivered by someone famous or influential. The message must be easy to share and clearly encourage the recipient to make a donation to the museum, for example, for a new acquisition. This means the message should spark an emotion in the person who sees or hears it, because that is more important than its informational content alone. This strategy is also easier to use if the museum already has many friends or followers on platforms such as Facebook, Snapchat, YouTube, Instagram or Twitter/X. Similarly, soliciting donations by text message requires both a powerful message and ease for users to make a payment via their mobile phone. The principle remains the same: convincing a multitude of donors to give to the cause of their choice.

Of course, the existence of online fundraising campaigns facilitates giving, because it means donations can be made with a single click. But in reality, faced with competition from thousands of other, equally attractive campaigns, most donors will probably come from a combination of circles of people who are already somewhat close to the museum: its friends, followers, members or volunteers, people who receive its newsletter and messages, and people in its contacts database. Only very prestigious and well-known institutions can convince distant donors with no existing relationship to the museum – even a tenuous one – to make a donation. The museum must also accept the idea that even if conducting an online campaign is not very costly; it still has costs: expenses related to the salaries of museum staff working on the campaign (preparatory work, internal meetings, meetings with service providers, benefits management, etc.), expenses related to the communication tools that will be used to launch the campaign and follow up with potential donors,

and expenses related to outsourcing for crowdfunding platforms, PR, event planning, media relations, etc.

Unique Characteristics of Crowdfunding

Beyond the financial objective and the desire to enlarge its donor base, a crowdfunding campaign can allow a museum to project a modern image of itself, and even more so if it gives rise to a publicity campaign. But there is a limitation to this funding technique. It is best suited to one-time solicitations – such as for the restoration or acquisition of a work of art, for example – but is not appropriate for covering a museum’s day-to-day operational costs and therefore cannot replace other fundraising tools. Incidentally, European museums tend to use this technique more than museums in North America, for example, as they already have a number of other regular channels for reaching out to their audience (members, volunteers, donors, etc.). In addition, these campaigns are difficult to reproduce regularly, at the risk of exhausting contributors. While the Louvre may be able to conduct its *Tous Mécènes* campaign every year, thanks to its size, image and reputation, it is much harder for a smaller museum to justify appealing to the public’s generosity for multiple large projects.

Donors generally come from three circles: the circle close to the institution, the more distant circle on social media, and the viral circle that did not previously know about the museum but develops an interest in it thanks to an effective campaign. To reach one circle, the museum must reach out to the previous circle and then gradually expand. In other words, a crowdfunding campaign is unlikely to succeed only thanks to people who are not close to the museum in one way or another. But if a core group of donors is seriously mobilised, it will be possible by extension to reach additional individuals, who are caught up in the momentum of the campaign.

For most projects, a museum can reach a circle of people who are close to the cause being funded. In order to fund the urgent restoration of historical models of medical devices, for example, the Bar-le-Duc Museum in eastern France appealed to medical doctors’ associations, who were sensitive to that specific cause even without having any previous attachment to the museum. While geographic proximity between the museum and its potential donors is an important element in a campaign’s success, the communication strategy, the museum’s image and media actions can greatly facilitate the development department’s efforts to reach people who are geographically further away.

The Musée des Impressionnismes in Giverny, France, conducted a campaign to raise funds from all over France, on and offline, to acquire a painting by Caillebotte. While the museum is relatively new and has no real collection to speak of, it benefitted from the image of the village of Giverny (associated with the memory of painter Claude Monet) and the general public’s interest in Impressionist works, but it also took advantage of effective media publicity.

How to Communicate Effectively?

No campaign can be launched successfully without a real effort to communicate, including on social media, using tools offered by different platforms (news, comments), and even offline (flyers). There is a positive correlation between the number of a museum's friends or followers on social media and a campaign's chances of success. The communication strategy (content to share, media plan, etc.) should therefore be developed before the campaign, which often takes longer than planned. Determining the right fundraising goal is crucial to a project's success. For one, most crowdfunding platforms operate on an 'all-or-nothing' principle, which means that an overly ambitious goal will cause the campaign to fail. What's more, it has been shown that the higher the goal, the lower the chances of success. When determining the amount, the museum would like to raise, it is therefore necessary to establish the minimum amount needed to achieve the project (rather than the ideal amount), even if that means setting additional goals during the course of the fundraising campaign once the initial goal is met. All of these tasks can be carried out internally, by one or more staff members. Preparing and managing even a small campaign can take a full-time staff member two to three months to complete, especially if it is their first campaign. The task can also be outsourced to a communications firm, as the Musée d'Orsay in Paris, France, did for its *Painter's Studio* campaign; however, this type of service must be included in the total campaign budget (in addition to the platform commission).

What steps must be taken to launch a crowdfunding campaign?

The main steps in launching a crowdfunding campaign can be summarised by the following questions:

- 1 What is the museum's goal? To reach new donors and/or fund a project (and for what amount)? The strategy the museum should use will depend on the balance between these two priorities.
- 2 What is the project? The project should symbolise the museum and be easy to promote to the public.
- 3 For what amount? The average crowdfunding donation in France is around 50 EUR (*Baromètre du crowdfunding en France* 2018), so to meet a 5,000 EUR goal, the museum would have to convince at least 100 people. It is better to set a modest goal initially and add additional goals later.
- 4 For how long? Contrary to what one might think, the longer a campaign runs, the less likely it is to succeed, because there needs to be a sense of urgency to keep donors from procrastinating. Taking into account the content that must be put online to bring the campaign to life, it is generally recommended that a campaign with a reasonable fundraising goal last no longer than eight weeks (Etter *et al.* 2013; Mollick 2014).
- 5 What benefits? While ensuring compliance with national laws (in France, for example, benefits are limited to 25 per cent of the value of the donation, up to a limit of 69 EUR), benefits may be symbolic (such as a name on a wall of donors) or material (such as a catalogue). Benefits often include inviting the donor to the

opening of the project, a private visit or even a lunch with the curator; all, obviously, in proportion to the amount of the donation.

- 6 How to turn one-time contributors into regular donors? It is important to maintain a connection with these contributors, because they can become recurring donors if kept regularly up to date on the project's progress, invited to events or encouraged to promote it as a project ambassador. For example, contributors to the restoration of Courbet's *The Painter's Studio* at the Musée d'Orsay received regular updates on the project and its progress. Three years after the campaign ended, they are still receiving information about the painting. Contributors can also be invited to join the Friends of the Museum association, if one exists, to become members of a donor's circle, or even be the first contributors in the next campaign.

Some principles to follow in order to conduct a successful fundraising campaign using digital tools include: setting a realistic fundraising goal, choosing the right time for a campaign, planning and coordinating the efforts of the different departments involved in the campaign, calling on volunteers, using digital technology – especially for potential donors who would wish to use it – explaining the purpose of the campaign and how donations will be used, setting a time limit (even creating a feeling of urgency), communicating about the project before the fundraising campaign, and, finally, thanking all of the donors.

Data Collection

The museum must first and foremost maintain the public's trust by collecting information freely and voluntarily, or its image and reputation could be damaged. With that principle in mind, different methods can be used to collect such information in a non-intrusive way, e.g., by mining past contacts with visitors (ticket sales, donations, store transactions, etc.), any stated interests or preferences, socio-demographic data, etc. Other types of data can be collected through surveys conducted regularly or on a one-time basis by the museum, internally or by an outside service provider. Collecting such data requires collaboration among the museum's different sections or departments, which is essential to ensuring the success of the process. Advanced statistical analyses can reveal specific profiles of members who share certain characteristics and whose characteristics differ from other profiles identified through research. Identifying different families of potential donors makes it possible to develop tailored arguments and effective forms of communication. Message recipients will then be more interested in their content, more likely to open, read and respond to them, and even share them with their contacts. Database segmentation is typically done by marketing departments, which usually only exist in museums of a certain size.

However, it is possible, even in smaller institutions, to use CRM tools, which help automatically manage members, followers and donors. Different software programmes offer services for customising a museum's relationship with its audience, such as online registration and ticket sales, online donation forms, automatic

letter or email mailings, publications on social media, etc. For example, by entering their membership number, a person can automatically receive discounts in the museum store. Automating certain routine procedures allows a museum to dedicate more time and resources to more complex efforts. Another crucial requirement is maintaining up-to-date information, without which a database will quickly lose its relevance and effectiveness.

With accurate, up-to-date information, a museum can test the effectiveness of planned project campaigns among a sample of respondents in order to choose the most effective project. Using statistics on email opening rates, the number of clicks on links in the message, unsubscribe requests and conversion rates, it can vary the form of a message, its content, its frequency, or even the type of customisation used in order to learn relevant lessons about the fundraising strategy. One of the most advanced museums in terms of using these tools is the Whitney Museum in New York. During construction of its new building, the museum specifically recruited a large digital team with statistical expertise. Smaller museums can still use these types of analyses by taking advantage of the tools mentioned above or by training employees to conduct them.

What Type of Organisation Should Be Used?

Depending on the size of the museum, development can be managed by a specific department focused exclusively on fundraising or by the marketing and communication departments, or even by the museum's leadership. In countries where sponsorship is not a major source of funding, there is rarely a team dedicated exclusively to raising private sector funds, and only large museums can create such a specialised department, made up of experienced professionals who work with volunteers and liaise with the board of directors. Conversely, museums in other parts of the world always have a development department, or at least one person responsible for fundraising operations.

It is still useful, however, to involve a variety of people from different backgrounds, because fundraising efforts must target different audiences, such as companies, foundations and individuals, and have different goals: funding ongoing needs, funding a one-time project, raising money for a particular fund, funding an investment (renovations or construction of a new wing, for example), raising contributions to endowment funds, etc. Finally, it is also useful to consult bequest specialists when planning fundraising campaigns, as discussions with potential donors can often include technical, legal and tax-related aspects.

The development team may be placed under the authority of the museum director in order to facilitate contacts between major donors and museum leadership, as is the case at the Musée des Beaux-Arts in Lyon, France, or the Musée du Quai Branly in Paris, France, or it may be placed within the communications department, like at MoMA (the Museum of Modern Art) in New York. What is most important is collaboration among departments with the aim of reaching the museum's fundraising objectives. General management and the museum's sponsorship, marketing and communications managers should agree on objectives, share information and

regularly report on the results of their efforts. The participation of the curatorial and public outreach departments is also essential. Their knowledge and expertise are critical in developing content to send to donors, and their participation in organising private visits, for example, can transform a donor's experience. That is how the entire organisation can be as effective as possible in conducting fundraising campaigns, whether digital or not (Tobelem 2023).

Conclusion

The role of digital technology is set to increase in every sector, including in museum fundraising. In the near future, the portion of online donations (particularly from mobile phones) should rise from approximately 10 per cent of the total amount of donations to between 20 percent and 30 per cent. One can also reasonably expect that social media will continue to play a greater role in fundraising. Museums must therefore actively prepare for this change while strategically reflecting on their fundraising goals and ways to meet them. While the development of information and communication technologies has made it easy and inexpensive to launch a fundraising campaign, and while it is now possible to make a donation simply by using secure payment solutions on a mobile phone, the increase in potential donor solicitations, and the growing difficulty of capturing their attention, will require adopting a highly professional, strategic approach.

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