Facing the Cuts: How Public Broadcasters Can Strengthen Fundraising Today

SEPTEMBER 3, 2025

A Public Media Company / CDP Webinar

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WEBINAR LOGISTICS

1. All microphones are muted and cameras off
2. We welcome conversation – please use chat function to share questions and thoughts
3. Webinar being recorded and posted on PMC website: www.publicmedia.co/webinars

Facing the Cuts: How Public Broadcasters Can Strengthen Fundraising Today

PUBLIC MEDIA CO.

CDP
More for your mission.

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ABOUT PUBLIC MEDIA COMPANY

Public Media Company is a nonprofit consulting firm dedicated to serving public media. We leverage our business expertise to increase public media's impact across the country.

Public Media Company works in partnership with stations in urban and rural communities to find innovative solutions and grow local impact. We have worked with nearly **400 public media organizations in all 50 states**
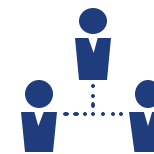
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4

MISSION: FOCUSING ON THE FUTURE PROSPERITY OF STATIONS

Grow net revenue and donors at participating station

Drive better fundraising practices at stations

Enable deeper and more personalized engagement with donors

Allow data and insights to dictate the execution strategy

PUBLIC MEDIA CHALLENGES

RELEVANCE

In a rapidly changing media environment, how to compete and serve? What can we learn from each other and other local media organizations?
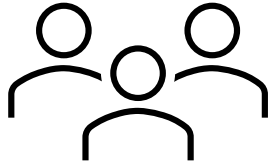
EFFICIENCY

Overbuilt infrastructure and duplicative programming in some parts of the country. Operational efficiencies are key.

UNDER ATTACK

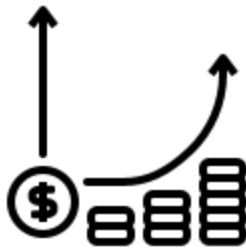Federal funding has been eliminated. Fundraising best practices are more important than ever

AGENDA

COLLABORATIVE APPROACHES

DATA-INFORMED FUNDRAISING PRACTICES

INCREASING ROI IN FUNDRAISING

GUIDANCE FOR STATIONS OF ALL SIZES

COLLABORATIONS – CONTENT & SALES

CO-PRODUCED CONTENT FOR STATEWIDE DISTRIBUTION

Jointly produce regional news, cultural, or educational programming with a shared brand and format, with content aired across all

COLLABORATIVE UNDERWRITING SALES

Pooling resources to create a regional underwriting sales team or shared account reps

DIGITAL SPONSORSHIPS AND ONLINE REVENUE

Build a shared regional digital platform (website, YouTube, podcasts, newsletters) with shared ad inventory

EVENT-BASED REVENUE

Organize regional live events, such as screenings, panel discussions, speaker series, concerts, community forums, or educational workshops, with ticket sales and sponsorship support

COLLABORATIONS – FUNDRAISING

JOINT FUNDRAISING CAMPAIGNS

Membership drives, major giving campaigns, and planned giving outreach under a unified brand or theme

FOUNDATION AND GRANT COLLABORATION

Partner on regional grant proposals targeting foundations that support journalism, arts, education, and civic engagement

STATE GOVERNMENT AND LEGISLATIVE FUNDING

Form a statewide alliance to advocate for legislative funding for public media infrastructure, content, or broadband partnerships

COLLABORATIONS – ADMIN & TECHNICAL

MASTER CONTROL AND ENGINEERING CONSOLIDATION	COLLABORATIVE TECHNOLOGY INFRASTRUCTURE	JOINT CONTENT PRODUCTION RESOURCES
Share master control, playout, and engineering staff by centralizing in one hub or through cloud-based workflows	Pool resources to build or maintain shared digital platforms, asset management systems, and cloud-based editing/archiving	Share field production crews, studio spaces, editing suites, and post-production services

COLLABORATIONS – ADMIN & TECHNICAL (2)

FACILITY SHARING OR CO-LOCATION	SHARED ADMINISTRATIVE SERVICES	GROUP PURCHASING AND VENDOR CONTRACTS
Explore shared office, studio or tower space in overlapping or adjacent markets	Consolidate functions such as accounting, legal, and IT support	Leverage collective buying power for software, insurance, IT infrastructure, office supplies, telecom, and broadcast equipment

11

COLLABORATIONS – OTHER

JOINT EMPLOYEE TRAINING AND DEVELOPMENT

Co-host training sessions, compliance workshops, and professional development programs

AUDIENCE RESEARCH AND DATA TOOLS

Share costs for audience measurement platforms, donor analytics software, and market research services

SHARED MARKETING AND COMMUNICATIONS

Coordinate efforts in branding, social media, public relations, and campaign design

SHARED/SUPPORT SERVICES

Accounting / HR/Admin.

Membership

Underwriting

Content Collaborations

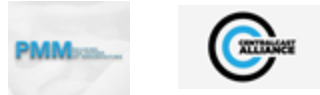TX, CA, Gulf States, Midwest, Mountain West, New England

Datacasting

Major Giving

National Content

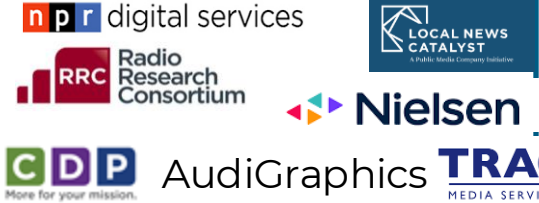Joint Master Control

Mobile Apps/ Streaming

Joint Transmission/Tower n Boston, Chicago

Engineering

Regional and national foundations

Funding

Analytics and Data

System entering a new era

- The public is meeting the moment
  - Giving across majority of key metrics up significantly in 2025
    - Most recent six months countering impact of lackluster prior six months
  - Putting a dent in the funding delta
  - Donors building financial runway for local PMO's next moves
  - Some PMOs still unable to fundraise around defunding issue due to local conditions
- Innovation and creative solutions are happening *now*

Membership Revenue	New Donors	High-dollar Gifts	Sustainers
All stations	All stations	All stations	All stations
+24.1%	**+75.9%**	**+66.3%**	**+6.2%**
Apr-Jun 2025 v. Apr-Jun 2024	Apr-Jun 2025 v. Apr-Jun 2024	Apr-Jun 2025 v. Apr-Jun 2024	Apr-Jun 2025 v. Apr-Jun 2024

National Reference File – Largest Data Collaboration in Public Media

- 213 stations participate in the NRF
  - TV/Joint & Radio cohorts
  - Over 75% of all active donors
- 4.7+ million active donors
- $1 billion in total revenue
- Largest collection of public media donors
- When you participate in the NRF, your data is secure and always under your control
- Participation is free, as is the monthly ROAR report

Starting with ROAR

- The ROAR report is free for NRF participants

- Monthly KPI review with actionable insights and clear opportunities

- Benchmarking
  - ‣ Average and Good Values
  - ‣ Opportunities are calculated for you

- Areas of focus
  - Retention
  - File composition
  - Revenue quality
  - Donor Value

- Is the share of my new donors making sustainer gifts impacting retention?

- Is the opportunity for major gifts in the number of donors or the value (or both)?

Revenue Opportunity & Action Report: July 2025

Identifying opportunities for **DEMO** based on station performance in the 12 months ending 6/30/2025 compared to all **TV/Joint** stations in the National Reference File.

Category	Description		12mo ending 6/30/25	% change from 3 mo. prior	% change from 1 yr. prior	Average value	Good value	Revenue opportunity @ avg. value	Revenue opportunity @ good value
Donor & revenue retention	1. Overall member retention	●	67.4%	-0.3%	+0.3%	75.0%	81.7%		
	2. Overall revenue retention	●	76.7%	-1.1%	-6.2%	85.3%	97.4%		
	3. First-year member retention	●	44.2%	-1.5%	-5.9%	55.5%	63.0%		
	4. First-year revenue retention	●	52.1%	-10.7%	-27.3%	67.9%	85.9%		
	5. First-year member retention (acquired via Acquisition Mail)	●	28.8%	+15.4%	-17.1%	50.8%	65.3%		
	6. First-year revenue retention (acquired via Acquisition Mail)	●	52.9%	+5.8%	-19.4%	77.1%	96.9%	$4,933	$9,377
	7. First-year member retention (acquired via Pledge Total)	●	37.0%	-1.0%	-1.3%	47.2%	55.7%		
	8. First-year revenue retention (acquired via Pledge Total)	●	34.2%	-3.5%	-20.0%	53.8%	70.7%	$44,541	$85,960
	9. First-year member retention (acquired via Digital)	●	58.0%	+1.7%	+3.2%	58.7%	68.2%		
	10. First-year revenue retention (acquired via Digital)	●	92.0%	+4.6%	-1.2%	81.8%	102.4%	good job!	$3,548
	11. First-year member retention (acquired via On Demand)	●	66.4%	-2.5%	-3.2%	65.5%	73.0%		
	12. First-year revenue retention (acquired via On Demand)	●	99.8%	-7.7%	-4.2%	97.1%	115.4%	good job!	$9,343
	13. Non-first-year member retention	●	73.3%	+0.3%	+2.1%	79.2%	84.9%		
	14. Non-first-year revenue retention	●	80.3%	+0.4%	-3.1%	88.1%	99.2%	$213,187	$746,434
	15. Sustainer revenue retention	●	85.2%	+0.3%	+2.5%	90.5%	100.1%		
	16. $1,000-9,999 revenue retention	●	75.7%	+1.9%	-30.5%	86.6%	104.9%		
Donor composition	17. % of current members with sustaining gifts	●	54.1%	+1.4%	+5.8%	53.5%	63.7%		
	18. % of first-year members with sustaining gifts	●	43.1%	+3.0%	+7.2%	44.9%	55.1%		
	19. % of current members who give $1,000+	●	1.1%	+0.0%	+0.0%	1.6%	2.4%	$96,709	$266,755
	20. % of current members with multiple gifts	●	11.2%	+4.5%	-7.1%	12.6%	16.0%		
	21. % of 48-month members with email	●	77.8%			84.0%	90.9%		
	22. % of 48-month members who are 6+ months lapsed	●	30.7%	+0.0%	-2.1%	29.8%	24.3%	$212,738	$745,772
	23. % of first-year members acquired via On Demand		20.8%	+2.8%	-6.1%	37.6%			
Revenue composition	24. % of membership revenue via On Demand (gifts < $1,000)		10.3%	-0.9%	-0.9%	9.4%			
	25. % of membership revenue via Digital (gifts < $1,000)		14.8%	+3.4%	+14.9%	12.5%			
	26. % of membership revenue from members giving $1,000+	●	23.7%	-2.8%	-2.8%	28.2%	41.0%		
	27. % of overall revenue via Planned Giving (3-year average)	●	2.7%	+27.3%	-54.1%	8.5%	15.6%	$312,894	$698,931
	28. % of membership revenue from sustaining gifts	●	40.8%	+1.4%	+4.9%	36.6%	47.3%		
Donor value	29. 12-month revenue per donor (under $1,000)	●	$103.16	+0.6%	+1.2%	$118.79	$135.37		
	30. 12-month revenue per donor ($1,000+)	●	$3,009.72	-2.1%	+2.5%	$3,178.63	$5,093.63		

See more benchmarks via our ROAR+ report suite, dig into file trends using our new Sherlock tool, and collaborate with other stations to put insight into action: talk to CDP about joining CDP Insights!

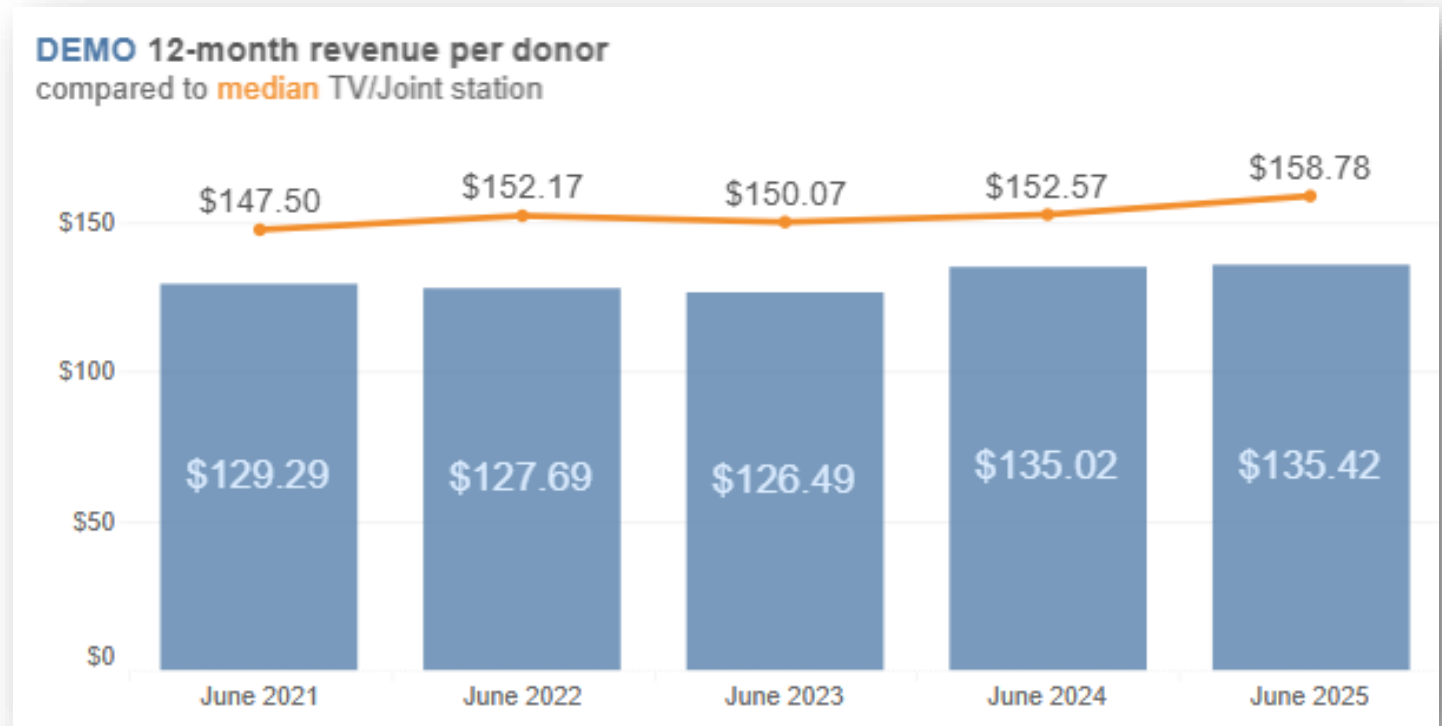**Total Opportunity:** $885,003 | $2,566,122

Executive Giving Summary

"How does our performance compare to other public media organizations?"

- See 12-month performance in key metrics for overall giving, first-year giving, major donor giving, and sustainer giving.

- See year-over-year change in performance for each metric.

- Compare year-over-year change to other stations across the system.
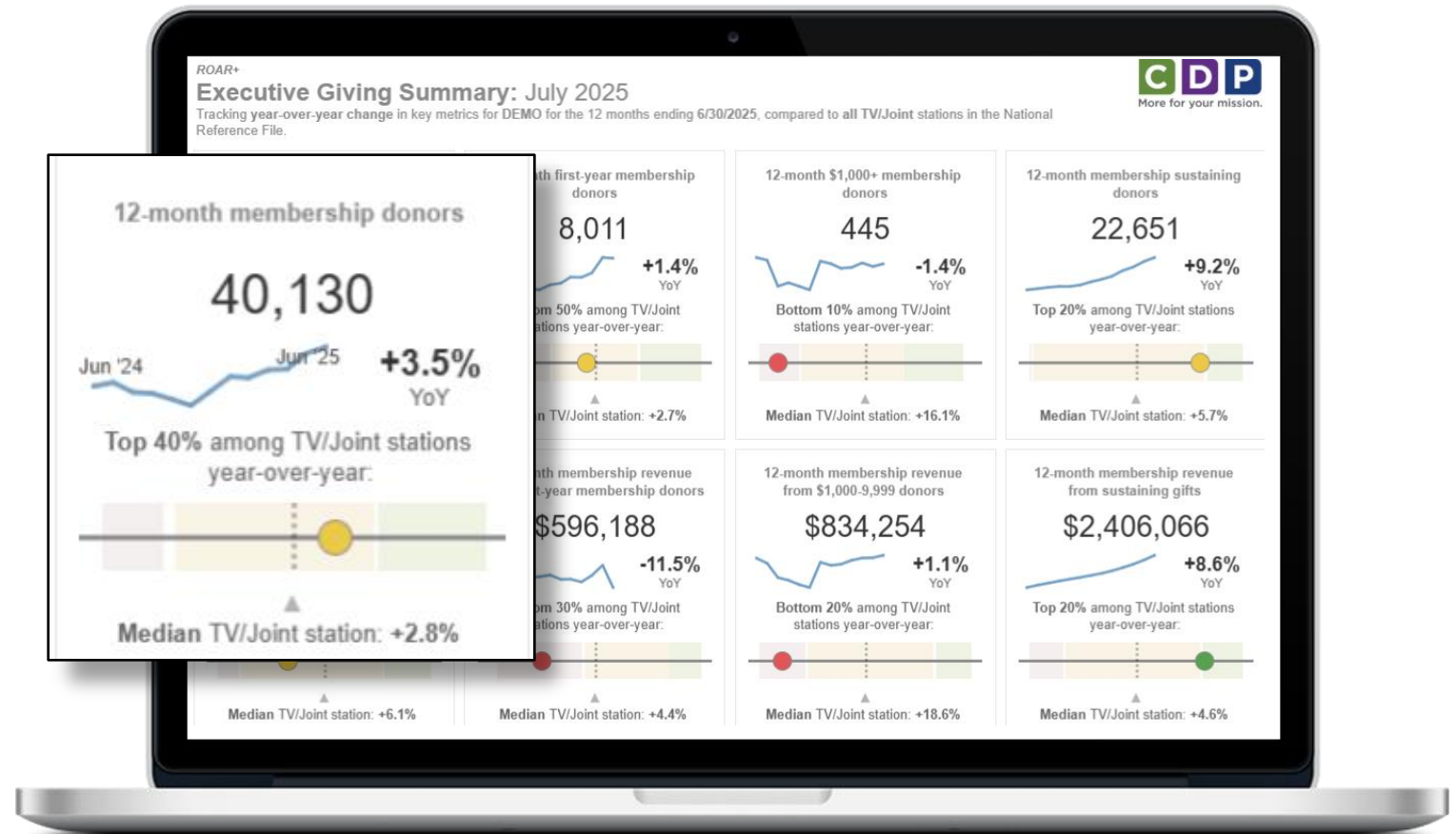
Understanding trends translates into accountability

- Specific trends across 5 years

- Comparison to peer groups

- Monitoring team's progress toward goals

- Is the result I'm seeing in my ROAR report new this year or has this been an area of opportunity for many years?
  - If a longer-term challenge, can I identify the root cause?

- Is my program improving in this metric?

DEMO 12-month revenue per donor compared to **median** TV/Joint station

	June 2021	June 2022	June 2023	June 2024	June 2025
median	$147.50	$152.17	$150.07	$152.57	$158.78
DEMO	$129.29	$127.69	$126.49	$135.02	$135.42

Understanding file composition unearths potential

"What is the trend of 50 year-old donors in pledge?"

"Are 70 year-olds with a college degree using passport? Is it growing?"

- Explore **donor file composition** through the lens of:
  - demographics
  - giving categories
  - giving amounts
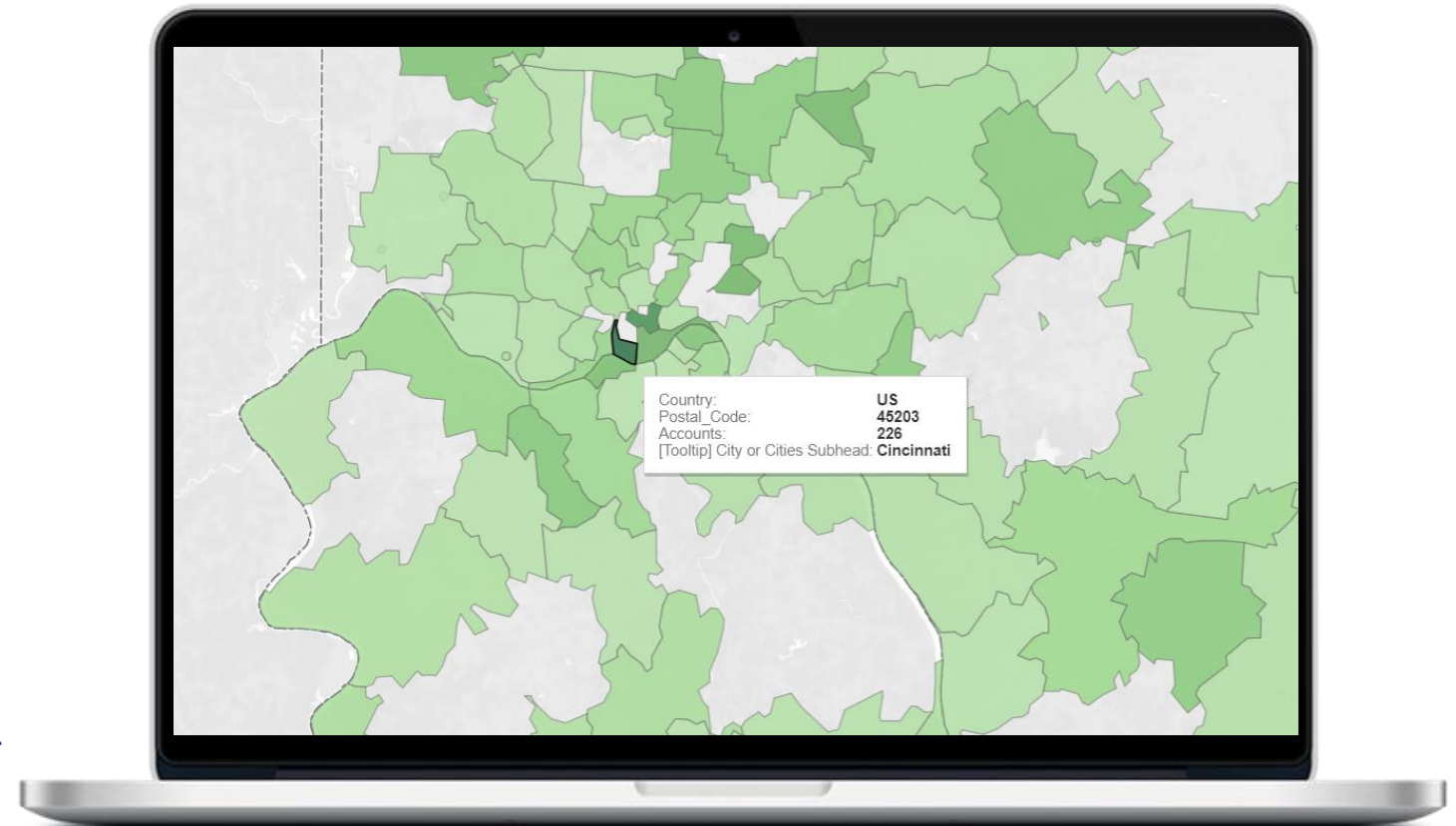 - streaming engagement
  - and more

Geographic data informs local engagement opportunity

"Which zip code should I target for our next kids event?"

"Which area would be most interesting for lawyers that focus on estate plans? Could they sponsor?"

"Where do our sustaining major donors live?"

- Geographic tool places your donors in a "where context" to inform:
  - community and donor engagement
  - stewardship and recruitment strategies
  - and more


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Country:                          US
Postal_Code:                      45203
Accounts:                         226
[Tooltip] City or Cities Subhead: Cincinnati
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Seeking opportunity by understanding the overlap

- Of 6,188 Public Radio donors making a gift in FY2023, 566 made a gift to Public Television

- Of 5,912 Public TV donors making a gift in FY2023, 566 made a gift to Public Radio

TV Donors

9.7% Overlap

90.3% TV Only Donors

Radio Donors

9.1% Overlap

90.9% Radio Only Donors
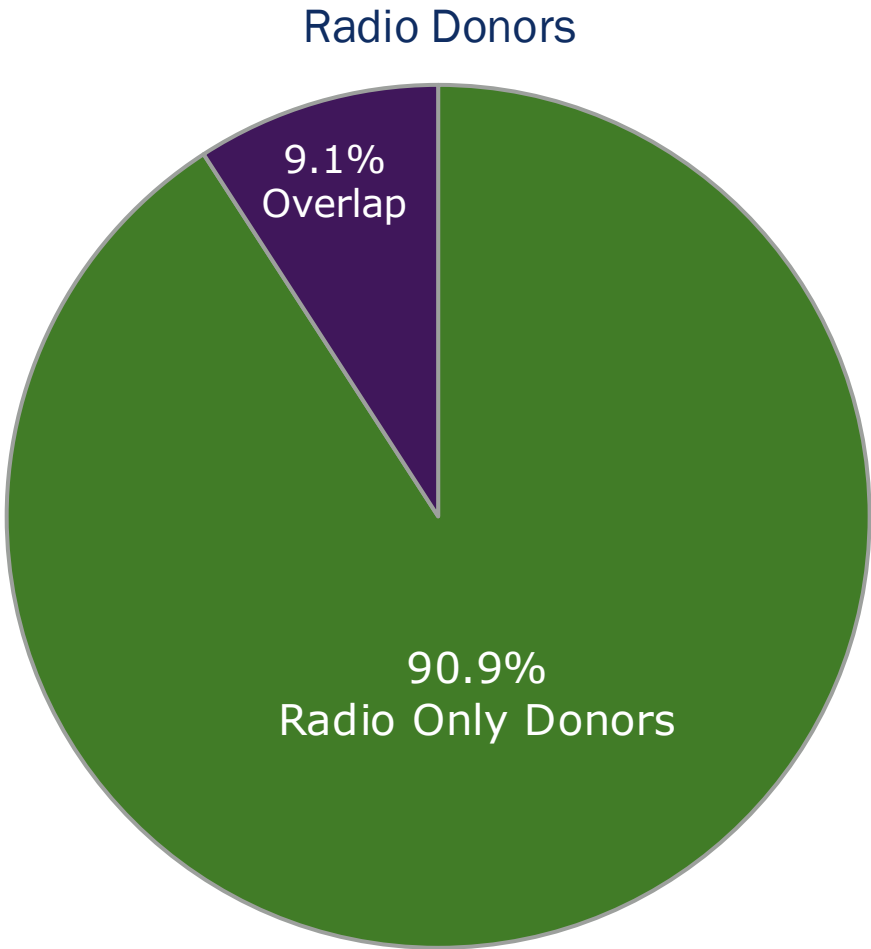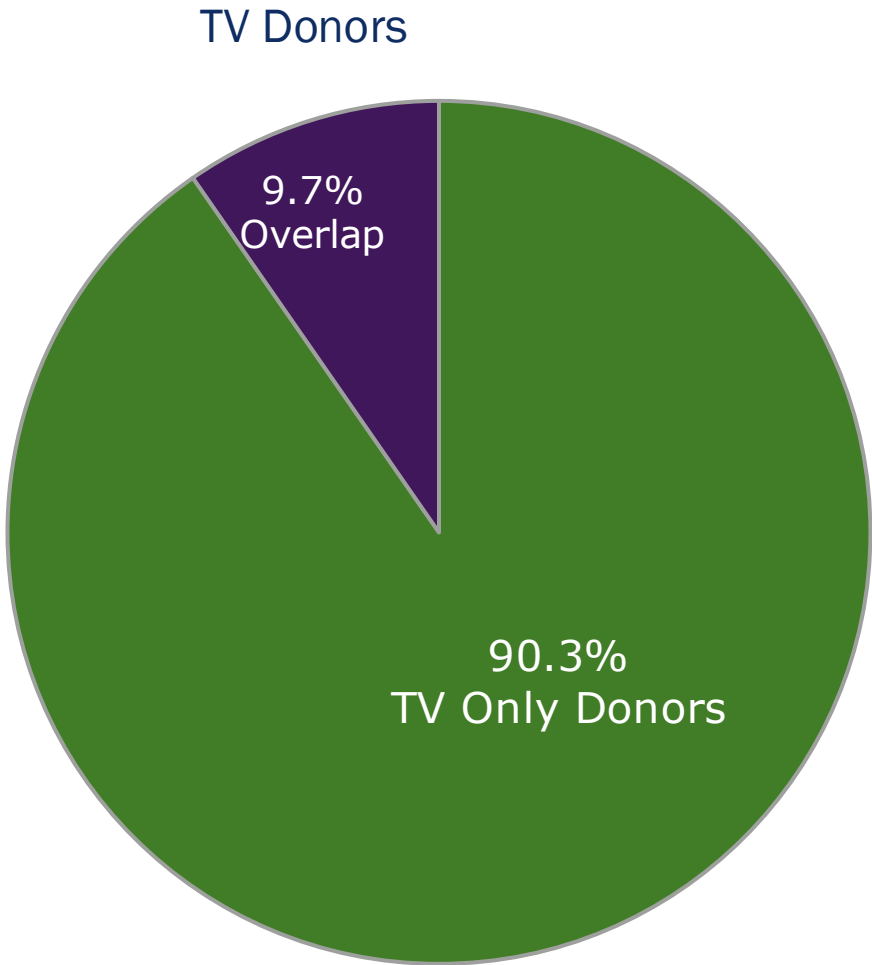
Total value of the overlap file

- 566 donors overlap

- Combined value of overlap giving is significantly above the single station performance

	FY23 revenue	Number of overlap donors	Average Gift
Radio	$ 145,480	566	$ 257.03
TV	$ 83,195		$ 146.99
Total	$ 228,675		$ 404.02

Cross-Membership Analysis for the Public Radio Stations in New York

CDP was engaged to conduct an analysis of the collective membership of the four stations

- **Goals:** Identify opportunities for enhanced fundraising performance and subgroups (i.e. members who support multiple stations) to target with different messaging and support coordinated new member initiatives

- **Outcomes:**
  - Analyzed 75,000 members across the four organizations
  - Identified overlapping members
  - Differences in giving habits between the different subgroups
  - Membership giving comparisons

All Donors –Overlap Across Organizations

ACTIVE (12M) DONORS	WNYC	WFUV	WSHU	WBGO
WNYC	**100.0%**	1.7%	0.0%	1.5%
WFUV	18.6%	**100.0%**	0.1%	3.0%
WSHU	0.4%	0.1%	**100.0%**	0.0%
WBGO	20.6%	3.9%	0.0%	**100.0%**

Major Donors

- Dual major donors = overlap donors giving $1000+ to both orgs

Major Donors Across Stations	NYPR	WFUV	WSHU	WBGO
Major Donor % of File	2.6%	3.4%	3.1%	2.7%
Dual Major Donor %	1.3%	5.1%	0.5%	10.3%

Revenue Insights

- WBGO has the highest percentage of revenue coming from overlap donors

22.8%
WBGO

14.8%
WFUV

3.7%
NYPR

0.6%
WSHU

All Donors:

WSHU: $273

WFUV: $267

NYPR: $247

WBGO: $191

Average Gift Comparison

Overlap Donors:

WSHU: $374

NYPR: $300

WFUV: $199

WBGO: $193

What you can do with it....

LEARNING FROM HIGH-PERFORMING ORGANIZATIONS

Sample PMO: Re-wiring major giving program

- Compare performance in the current year and overtime in relation to peers to identify an on-going, underlying issue or a recent development

- Review file and revenue composition to fully understand the opportunity

- Is the value of major donors on par with peers and geographical location?

- Strategies that can improve performance
  - Additional staffing / training
  - Change in level of stewardship
  - Deploying technology
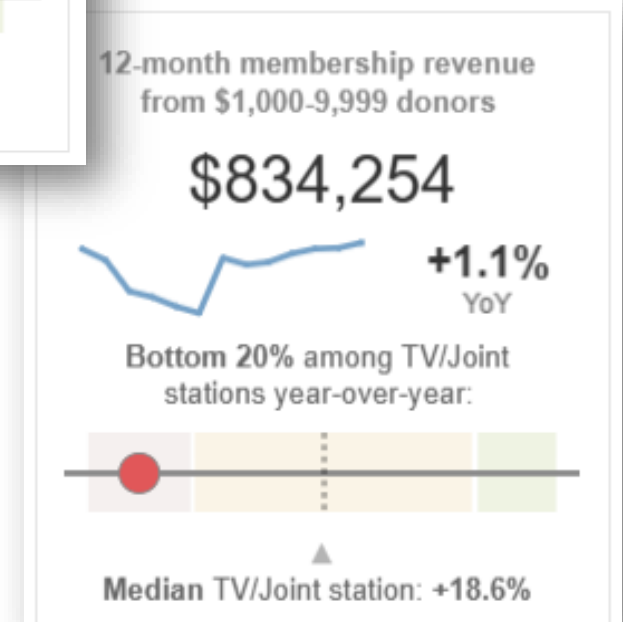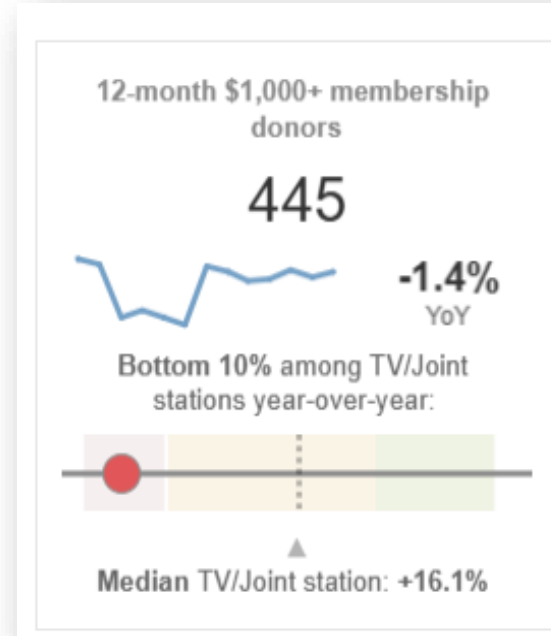
Understanding the opportunity makes it easier to focus resources

- Relative position to peers
- Precise calculation of opportunity
  - 30 points on $500k program
- Charting strategy
  - What would you do to get $150k in revenue annually?

Revenue retention $1,000+

96%

66%

Enhancing mid-level, major and planned giving
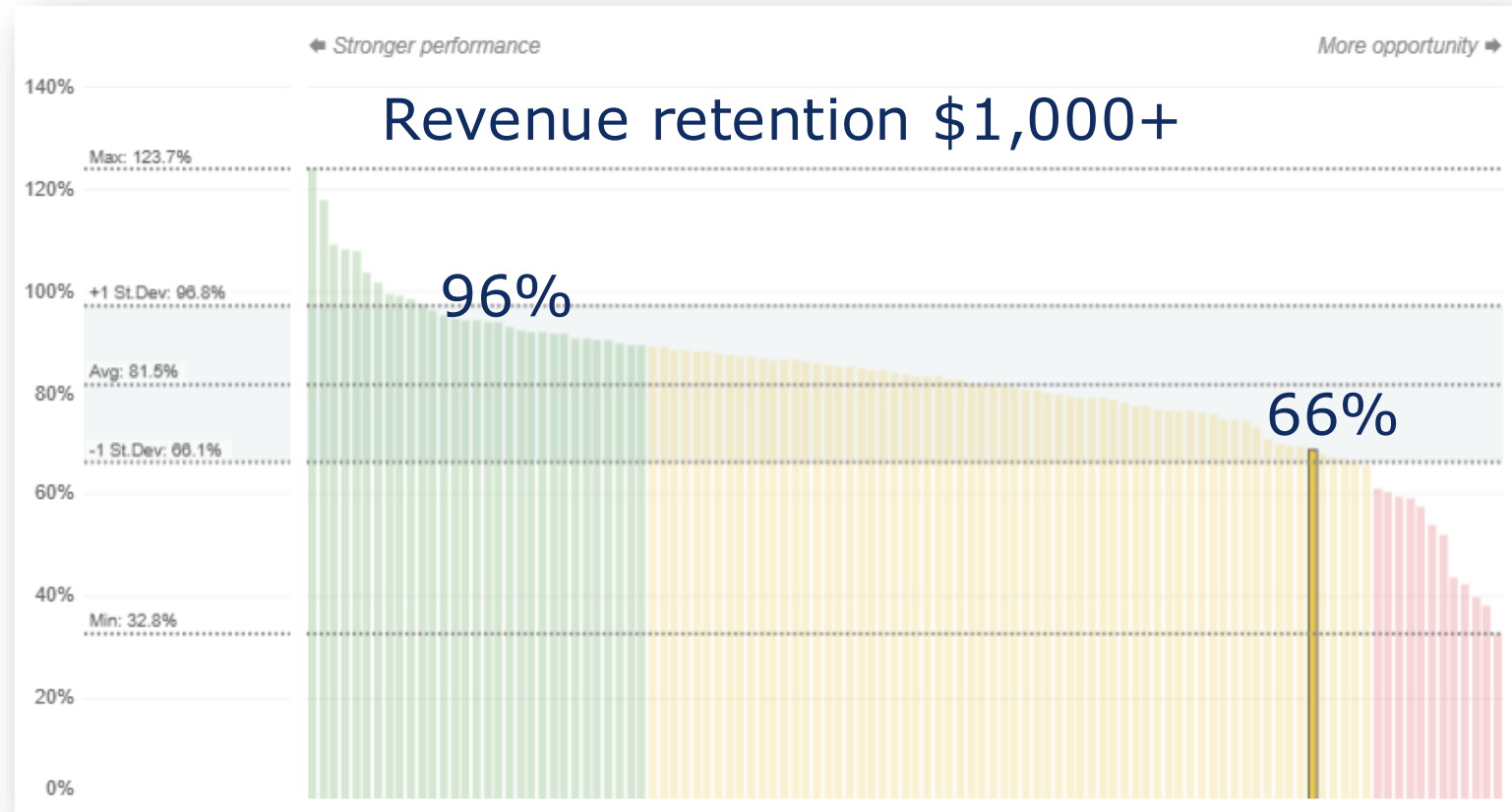
UNLOCK THE PHILANTHROPIC POTENTIAL OF YOUR DONOR FILE.

Gratavid:
- Personalized video to steward donors at scale

Raise:
- Build donor relationships at scale
- Manage mid-level and major giving moves management

Giving Docs:
- High-quality, online estate-planning tools

DonorSearch:
- Wealth & philanthropy screenings and donor demographic appends

Gratavid example – SDPB case study

SDPB FRIENDS | gratavid from gravyty

Fundraising challenge
→ Audiences turn to digital platforms for content
→ Pledge drives become less effective

Opportunity
→ Easier to retain a donor than a acquire a new one
→ New strategy to improve retention rate of new donors

Approach
→ Gratavid
→ Thanking membership, mid-level, and major donors

OUTCOMES

- Increased donor retention
- Increased first-year member retention:
  - SDPB's first-year member retention rate increased by nearly 5%
- Boosted first-year revenue:
  - SDPB first-year revenue retention saw surge of over 18%

GivingDocs – case study ETV Endowment of South Carolina

CDP
More for your mission.

Make-A-Will Month campaign launch

- Paid ads on social media sparked interest
- $2,500 budget across 3 creative ads yielded 7,799 landing page visits

Led to account activations during campaign

Local programming personalities/hosts featured interstitials bringing trusted voice to Giving Docs offer

- Campaign included email, a blog post, & social media (organic post, plus paid ads) – multi-channel marketing yields best results
- Interstitials produced & air consistently
- Giving Docs infused throughout the ETV Endowment's planning giving toolkits

RESULTS
4/1/2024 - 3/31/2025

- Account Activations: 709
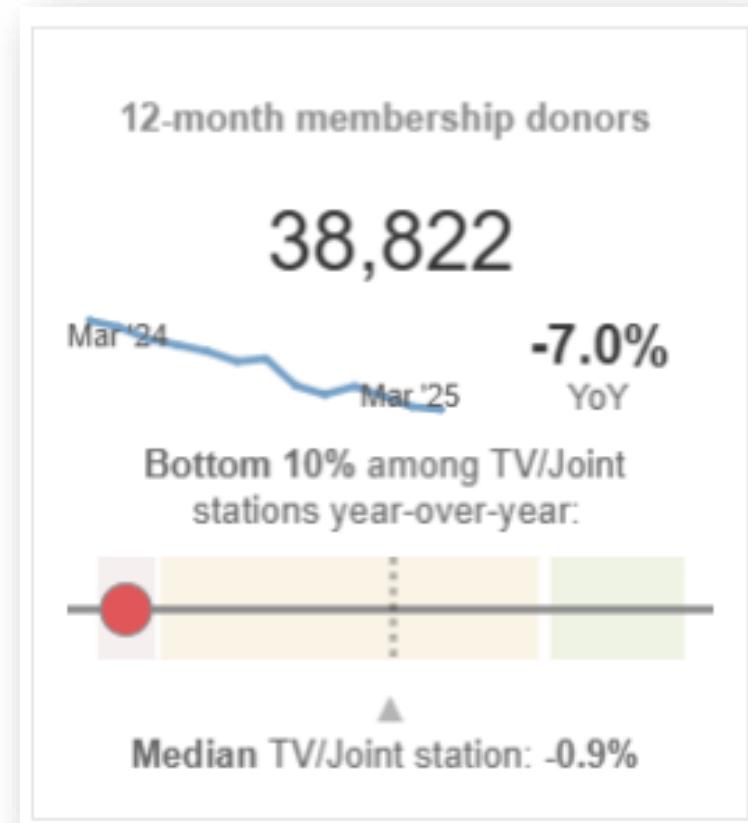- Completed Documents: 323
  - Handraisers: 49
  - Completed Gifts:34
- Estimated Value of Gifts: $2.3 million

Donor Composition Averages
- 79% of donors including legacy gift to the ETV Endowment in their plans made with Giving Docs disclosed their intention
- Accounts created by people aged 18-80+, with legacy gift intentions spanning decades, beginning with viewers/listeners in their 30s

32

Sample PMO: Not enough donors on file

- Understand the landscape and options
  - Consider audience trends

- Understand budget and investment options
  - Cost to acquire donor
  - Team capability to execute on new strategies
  - Scope technology available
    - Can you create donor journeys?
    - Does prospect pipeline exist?

12-month membership donors

38,822

Mar '24 .... Mar '25

-7.0% YoY

Bottom 10% among TV/Joint stations year-over-year:

Median TV/Joint station: -0.9%

Diversifying donor acquisition

REACH BEYOND PLEDGE TO ATTRACT AND ENGAGE NEW DONORS.

Canvassing:
- Sustainer acquisition
- Reach younger donors
- Hyper-local, hi-touch engagement

Virtual Events:
- Engage new audiences year-round
- Live connection with public media personalities

Strengthening donor revenue and retention

DEEPEN DONOR RELATIONSHIPS AND DONOR INVESTMENTS IN YOUR MISSION.

Conversational Text Marketing:
- Additional donor touch for renewals, add gifts, lapsed campaigns, sustainer recapture

Digital Advertising:
- Paid search, display advertising and more
- Keep your brand top of mind on digital platforms year-round and during key fundraising periods

Large scale collaboration:
Member Services Bureau and Mergers

MSB partnership

PMO

MSB Co-op

Major Giving
Grants
Corporate underwriting
Local events
Local marketing
Planned giving
Board engagement
Community relations

Strategy
Budget
Pledge
Website

Direct mail
Texting
Digital Marketing
Paid Search
Database
Data Overlays
Operations
Analytics
Reporting
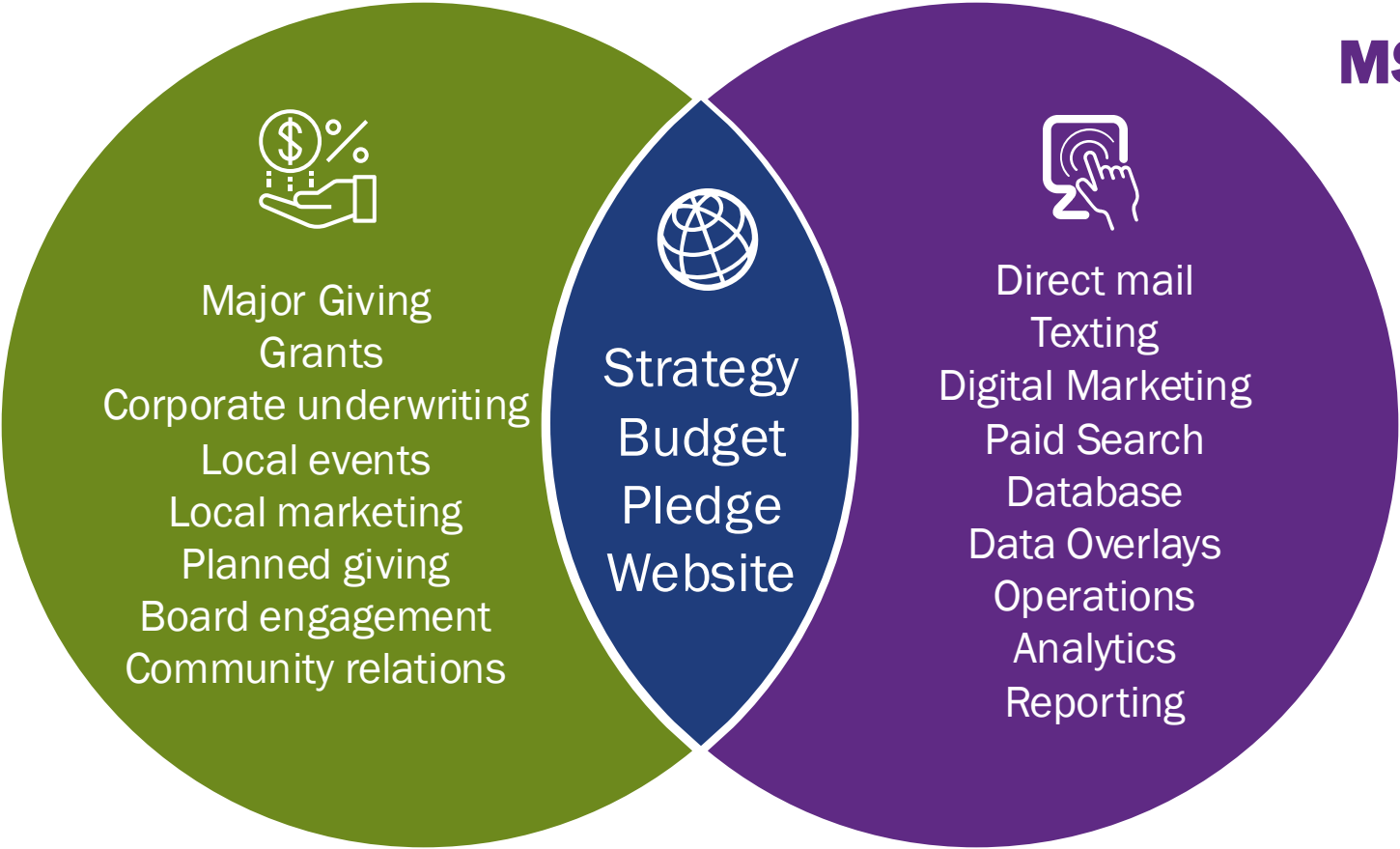
Solving organizational challenges

CHALLENGES	MSB SOLUTION
▶ Org size and resources	▶ No upfront costs to convert to new systems
▶ Technology costs	▶ Turnkey program on monthly retainer
▶ Keeping up with advancements	▶ Scaled buying and best practices execution
▶ Staff sophistication and training	▶ Redundant, reliable and proven model
▶ Talent turn-over	▶ Profitable from 1st year for every org size
▶ Cultures resistant to change	▶ Staff training, support, reporting
▶ Poor analysis of performance	▶ Future proofing partner as industry transforms

Doing your due diligence

Comprehensive audit of your membership program:

- Expense and revenue for direct mail program (renewals, add-gift, acquisition and lapsed)

- Expense and revenue for digital program (pledge and non-pledge)

- Total number of emails on file, total number of emails sent, and open rates for e-solicitations

- Costs of current membership program including annual expenses for CRM, Email, lockbox, staffing, online forms, telemarketing, credit card processor, etc.
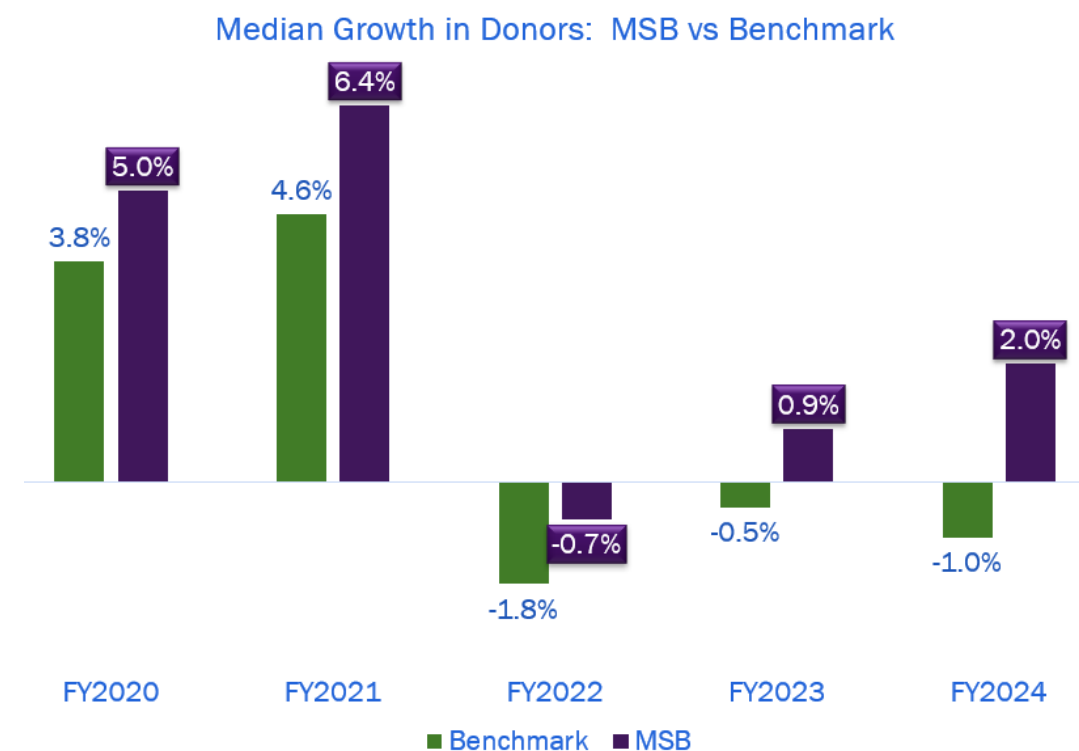
Result: 4-year forecast to understand the impact of Co-op participation:
- o Costs
- o Savings
- o The additional direct mail, digital and sustainer revenue that a station can expect
- Complimentary and can be used as a roadmap for a station's success
- Key question: Can your organization be net positive in the first full year?

Example: MSB projected to improve net income by $800k over 4 years

- Comprehensive change to resources and systems
  - Realignment of team – more focus on relationships and less on transactions
  - Entirely new tech stack focused on the future
- Applying best practices and increasing testing cadence
  - Track record: Out-fundraising peer groups for the last decade
- Fully-baked cost structure for membership
- Strategic partnership, built to withstand the future
- Building a launchpad for relationship giving

Median Growth in Donors: MSB vs Benchmark

- FY2020: 3.8% (Benchmark), 5.0% (MSB)
- FY2021: 4.6% (Benchmark), 6.4% (MSB)
- FY2022: -1.8% (Benchmark), -0.7% (MSB)
- FY2023: -0.5% (Benchmark), 0.9% (MSB)
- FY2024: -1.0% (Benchmark), 2.0% (MSB)

Benchmark   MSB

Meet the MSB family

50 Public Media Organizations

1.2 million active donors

$181 million annual donations

SHARED SERVICES & STRATEGIC COLLABORATION CHECKLIST

1. Internal Readiness Assessment
2. Partner Evaluation
3. Financial and Operational Analysis
4. Governance and Legal Structure
5. Implementation Planning
6. Measurement and Ongoing Oversight

KEY TAKEAWAYS

- Collaborations = broader reach + stronger community engagement + efficiency + cost savings
- Federal funding cuts require new operating models
- Stations can adapt, thrive, and preserve community impact with the right strategies

Assess your station's fundraising capacity
Identify collaboration and shared service opportunities
Reach out to PMC & CDP for tailored guidance

Q & A

PUBLIC MEDIA.CO
Strengthening public media

HOW WE HELP   INSIGHTS ⌄   GIVE NOW   ABOUT US ⌄   🔍

Public Media Company Webinars

Public Media Company has begun hosting a series of informational webinars for public media General Managers and station leaders to help them stay on top of our ever-evolving media landscape.

Webinar will be available on PMC website for all to view

www.publicmedia.co/webinars

THANK YOU!

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APPENDIX: SHARED SERVICES AND STRATEGIC COLLABORATION CHECKLIST

SHARED SERVICES & STRATEGIC COLLABORATION CHECKLIST

1. Internal Readiness Assessment

- Define the problem/opportunity: What cost, staffing, or revenue challenge are we trying to address?
- Set clear goals: Efficiency? Expanded reach? Donor growth? Sustainability?
- Assess capacity: Do we have the staff and governance bandwidth to explore/implement collaboration?
- Engage leadership & board early to ensure alignment.
- Inventory current resources: technical systems, donor databases, staffing, content production.

2. Partner Evaluation

- Identify potential partners: Neighboring stations, statewide networks, or national/regional shared service providers
- Assess mission alignment: Do partners share a vision for public service?
- Review financial health: Are partners stable enough to sustain a joint venture?
- Evaluate cultural fit: Do organizations have compatible management styles and workflows?
- Check regulatory considerations: Ownership, FCC compliance, contractual obligations.

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3. Financial & Operational Analysis

- Estimate cost savings: Capital, staffing, software/licensing.
- Project new revenue opportunities: Joint underwriting, pooled fundraising, digital reach.
- Compare one-time vs. ongoing costs: Technology migration, legal fees, integration costs.
- Identify staffing impacts: Role changes, redundancies, retraining.
- Assess risk factors: Dependency on partner performance, governance disputes, technology failures.

4. Governance & Legal Structure

- Define decision-making authority: Who owns the process and outcomes?
- Determine structure: Contractual service agreement, joint venture, new nonprofit entity, or informal collaboration.
- Develop accountability mechanisms: Regular reporting, performance metrics, dispute resolution.
- Engage legal review to ensure contracts protect all parties.
- Ensure compliance with FCC, licensee, state, and IRS nonprofit requirements.

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5. Implementation Planning

- Create a phased rollout plan: Start small (pilot) before full integration.
- Develop a communications strategy: Staff, donors, members, community, funders.
- Assign project leads from each organization.
- Establish training & support plans for staff affected
- Prepare contingency plans if collaboration ends or partner exits.

6. Measurement & Ongoing Oversight

- Define success metrics: Cost savings, revenue growth, audience reach, donor engagement.
- Track and report regularly: Monthly or quarterly dashboards.
- Solicit feedback from staff, partners, donors, and community.
- Conduct periodic reviews (annual or bi-annual) to adjust or renegotiate terms.
- Document lessons learned to inform future partnerships.