

DMAW

Fundraising Fundamentals 101

February 2026



DMΔW

Opening Announcements & Welcome Remarks



Teresa Weaver, Vice President, Client Strategy, O'Brien Garrett

Thank You to Our Committee & Faculty



Steven D. Fleshman
Founder/Creative Partner
DR2



Joe Harr
Marketing Strategist AARP



Victoria Heckler
Vice President Mal Warwick
Donordigital



Steven Kehrli
Sr. Vice President, Development
PETA Foundation



Yanni Saratsis
Vice President, Client Services
NextAfter



Amy Sukol
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Maska Neill & Co.



Teresa Weaver
Vice President, Client Strategy
O'Brien Garrett



Thank You to
Our Sponsors!



Upcoming Programs & Events



Scan the QR Code to view the full list of DMAW's upcoming Educational and Networking Programs.

Next month, we're excited to present:

- Sustainers Day: Building Loyalty, Maximizing Impact
- 2026 Nonprofit Fundraisers Symposium!

Membership Opportunities

Nonprofit Group Membership

Investment: \$450
for your ENTIRE TEAM!
No Limits

Benefits:

- Your Point of Contact will receive printed copies of *Direct Impact* and the Annual Membership Directory and Resource – *SourceBook*
- All additional members will enjoy digital access.
- Update your roster at any time.

Best Benefit: For New & Renewing Nonprofit Group Members

- **Receive 6 Complimentary Event Registrations**
 - Excluding the Bridge Conference and the Nonprofit Fundraisers Symposium.

Are You:

Interested in showcasing your brand to your primary audience?

Looking to demonstrate you're a leader in the sector?

Ready to network with nonprofit decision-makers?

DMAW

THEN YOU SHOULD...

Become A Sponsor!

For details and information, write to:

sponsorships@dmaw.org

Become A Volunteer!

Calling all speakers, writers, social media experts, strategists, designers, and graphic artists.

dmaw.org/volunteer

DMAW



Volunteering is an opportunity to collaborate with industry peers, showcase your skills, and position yourself for future career opportunities!

It's Your Turn!

Share Your Thoughts on Slido!



- Scan the QR Code to access Slido
- Submit Your Questions and participate in the live discussion!

Overview of Direct Response



Joe Harr
Marketing Strategist AARP



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Direct Response Acquisition Getting the First Gift



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Direct Response Acquisition: Getting the First Gift

What is Acquisition?

Acquisition: Refers to a broad, **multichannel set** of activities involved in **identifying, modeling, qualifying, engaging,** and **soliciting** non-donors for their **first** donation.

More on Acquisition

Efforts may include an organization's names, such as non-donor petition signers, magazine subscribers, or activists. Also known as **Prospecting or Cold Mail.**

Direct Response Acquisition: Getting the First Gift

1

The **goal of acquisition** is to acquire as many new donors as possible at a reasonable cost.

2

Acquisition is usually an **investment**.

3

Acquisition is **most successful** when taking a multi-channel approach.

Direct Response Acquisition: Getting the First Gift

Acquisition Channels

- Direct Mail
- Telemarketing
- Canvassing/Face-to-Face
- Email
- Digital Advertising
- DRTV/CTV
- Texting
- SMS Blast





Where Do Names/Mailing Lists Come From?

Direct Response Acquisition: Getting the First Gift

Where Do Names/Mailing Lists Come From?

- Rental Names
- Modeled Names
- Exchange Names
- Warm Prospects
- Lapsed Names



Direct Response Acquisition: Getting the First Gift

Suppressions/Eliminator Files

Lists of donors (or non-donors) that **should not** receive acquisition mailings – either because they are already donors to your organization or because they've explicitly asked to **NOT** receive mailings from your organization.

Direct Response Acquisition: Getting the First Gift

Suppressions/Eliminator Files

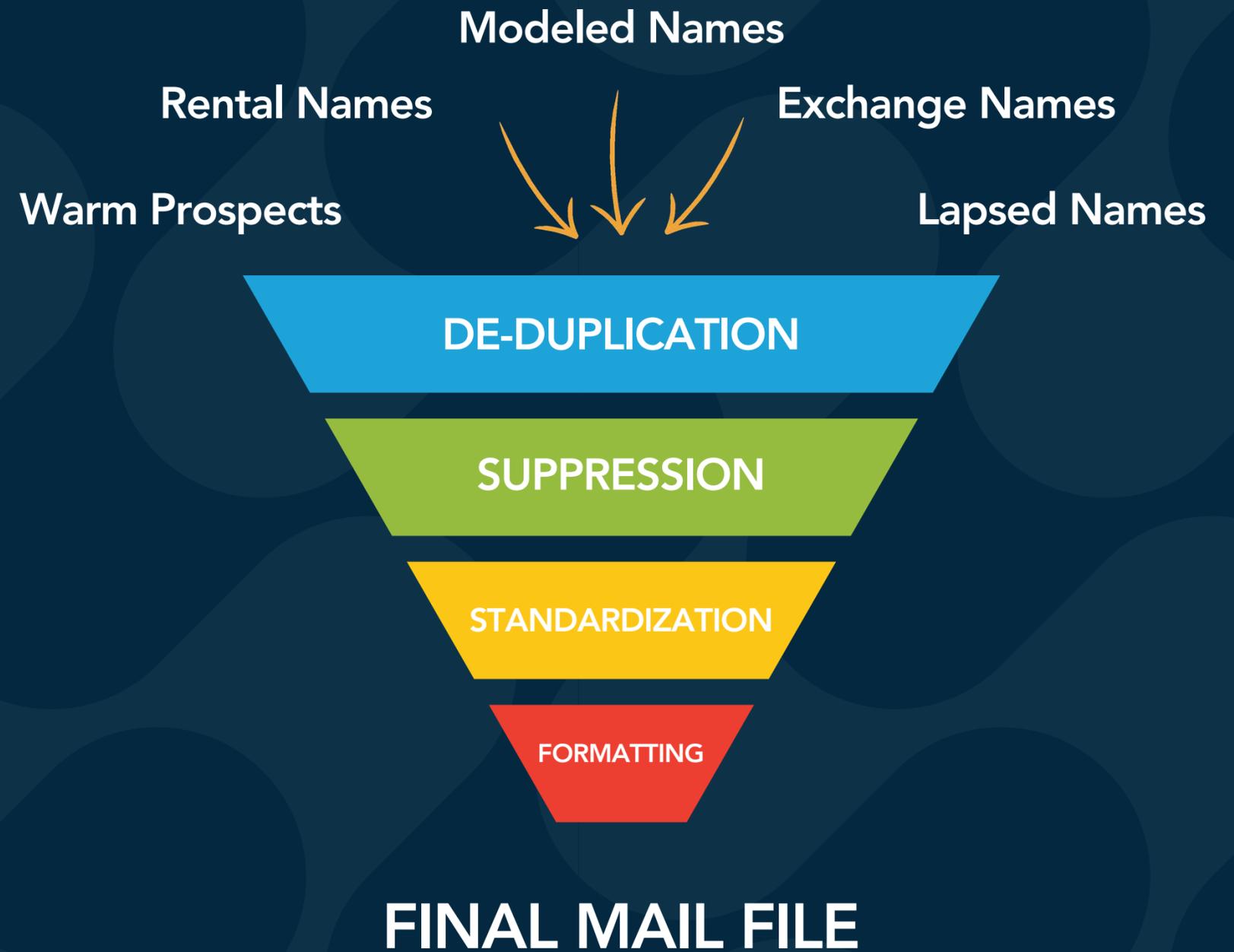
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Merge-Purge

Reformatting and merging multiple lists into one file, and removing unwanted and duplicate names.

Merge- Purge Process



Direct Response Acquisition: Getting the First Gift

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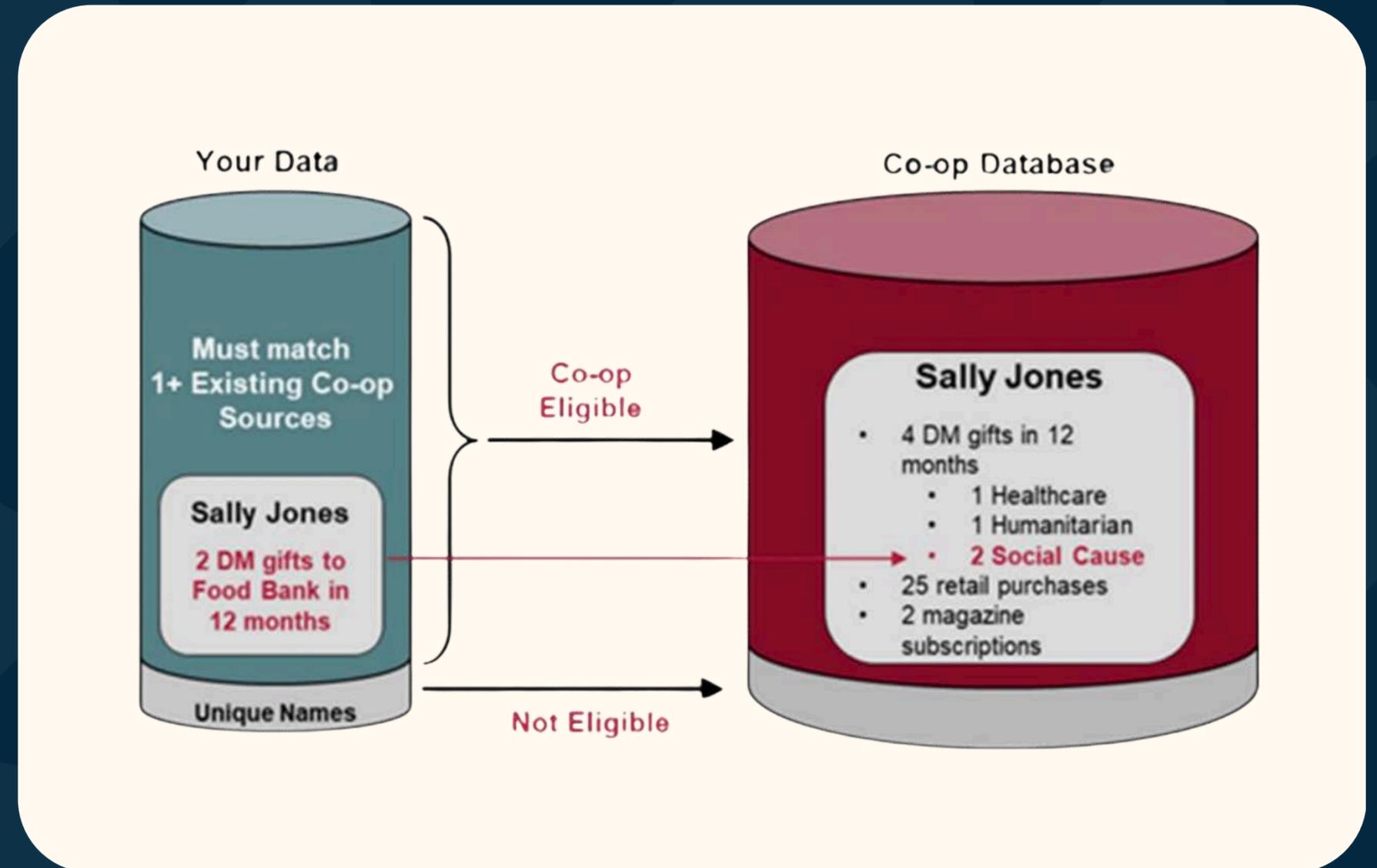
Reformatting and merging multiple lists into one file, and removing unwanted and duplicate names.

List Broker

Non-profits typically engage the services of a broker to source the best lists for acquisition mail campaigns.

Direct Response Acquisition: Getting the First Gift

Co-ops use models to find the best prospective donors in their database for your organization.



Direct Response Acquisition: Getting the First Gift

There are many types of models, but there are two common ones:

1

Response Models

Looks more closely at donor behavior and transactions to identify people who are likely to engage with your org based on their recent transactions. (For example, a sustainer model.)

2

Look-A-Like Models

Looks at your donors and finds people who have similar demographics and consumer behaviors.

“

If I Say Something Like:
“Back When I Worked At...”

“

I Want You To Say:
“Okay Boomer!”



Developing **Winning** Acquisition Creative



What Makes a Package Successful?

Here are the rules of mail and online packages.

Developing Winning Acquisition Creative

RULES FOR MAIL

Here Are The Dos!

(no don'ts in this section)



Carriers:

- Photos/No Photos
- Teasers
- Postage Treatment
- Addressing/Personalization

Developing Winning Acquisition Creative

**WHY DID THE GOVERNMENT
PARALYZE & KILL KITTENS?**



PO Box 98265
Washington, DC 20090-8265

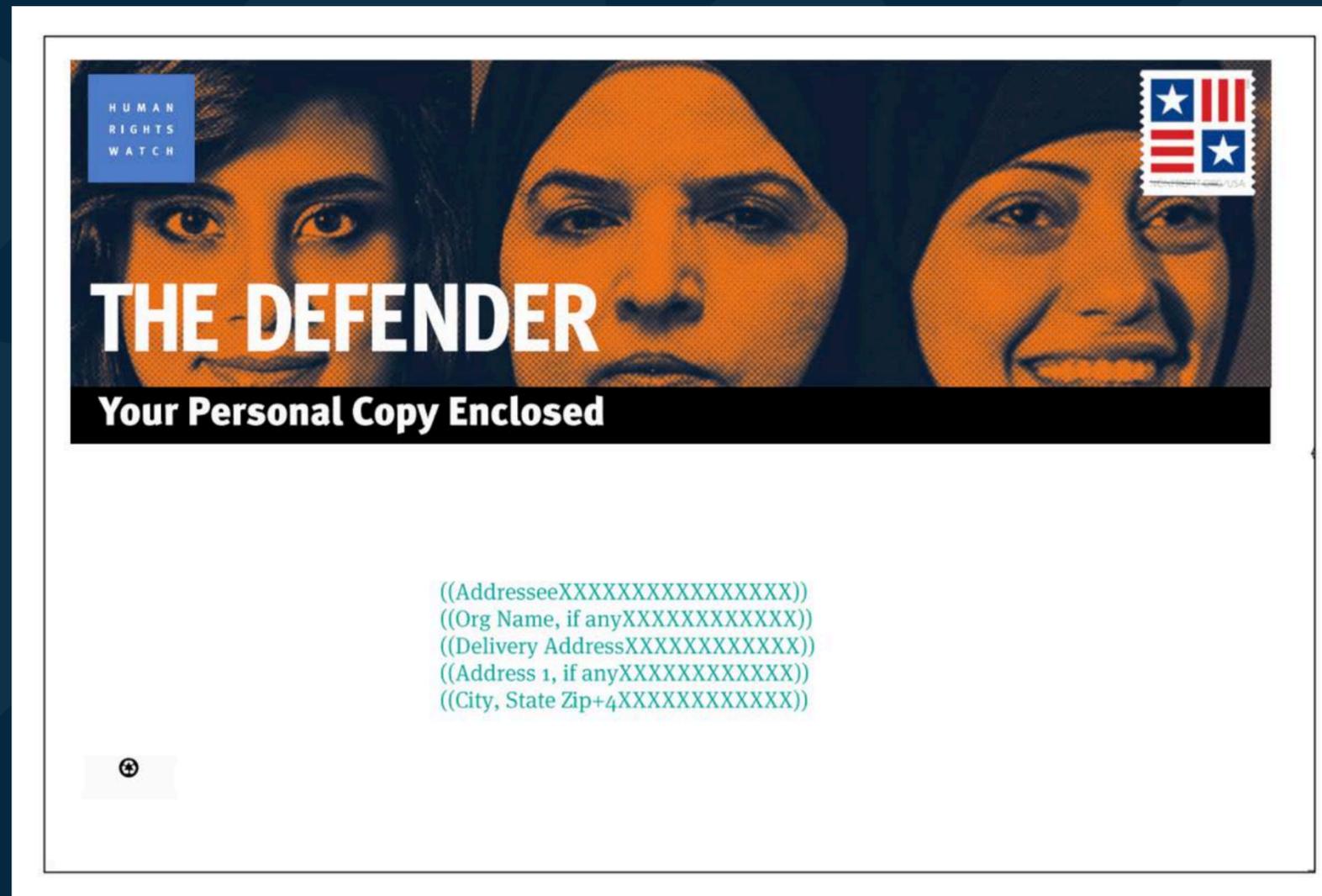
**SIGN THE ENCLOSED PETITION —
STOP THE GOVERNMENT'S
PAINFUL EXPERIMENTS ON KITTENS**

WCO061

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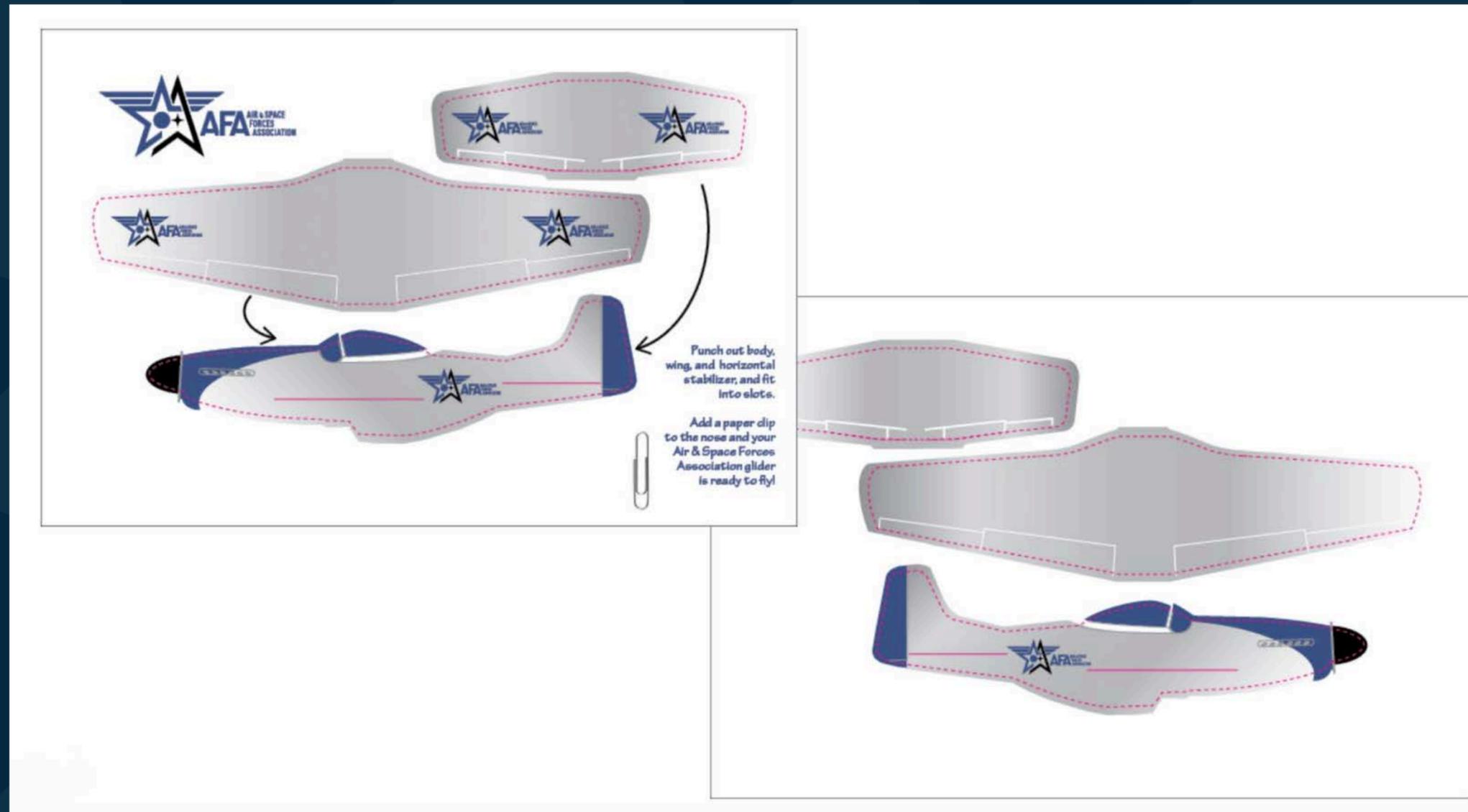
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Reply Devices:

- Affirmation/Yes Statement
- Check Box
- Ask String + Other
- Asterisk statement/Handwritten copy/Circle
The Ask Amount
- Donor Name and Address



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Gift Process Center
PO Box 2010,
Milford, NH 03055

Yes! You can count on me to provide a peaceful dignified home, complete with nourishment, enrichment and health care, for more than 220 chimpanzees at the sanctuary. Enclosed is my special year-end gift:

*This amount will really help.

<\$Ask1 > <\$Ask2>* <\$Ask3> My Best Gift \$ _____

Make my gift monthly.

Thank you for your generosity.

<IDXXXXXXX>

<NAME>

<ORG>

<ADDR2>

<ADDR1>

<CITY, STATEZIP>



April

My check is enclosed.

I prefer to donate with a credit card (see reverse).

Please email me with chimp updates!

SCAN TO
DONATE



Put your gift to work immediately at

SavetheChimps.org/donatenow

<SCANLINE 123456789012345>

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Letters:

- Type/Type Size
- Salutation
- Johnson Box
- Clear Ask on Page 1
- Signature of Sender
- PS with Reference to the Ask with Urgency



Kenneth Roth
Executive Director



Effective today, I am directing the Texas Health & Human Services Commission's Refugee Resettlement Program to not participate in the resettlement of any Syrian refugees in the State of Texas

Governor Greg Abbot of Texas to President Barack Obama

November 16, 2015

((Addressee))
((Org Name, if any))
((Delivery Address))
((Address 1, if any))
((Address 2, if any))
((City, State Zip+4))
((Country, if not USA))

Dear ((Salutation)),

In the aftermath of the Paris terrorist attacks in November 2015, 31 U.S. governors refused to accept Syrian refugees in their states. Even if governors had that power (which they don't), their logic is *reprehensible*. Security is empowered by the defense of human rights, not threatened by it.

You've no doubt noticed the blatant Islamophobia and shameless scapegoating of Muslims that has become part of today's political landscape.

So when an elected official in the United States promotes hatred, racism, and fear-mongering through proposed anti-refugee policies, Human Rights Watch believes that **you and I have the responsibility to step in.**

Will you help? Sign the enclosed petition to influential Governor Sam Brownback, former chair of the Senate Refugee Subcommittee. (More about him in a moment.) With enough voices chiming in, we could persuade him to change his close-minded stance.

Return your petition to me and I'll have it delivered with all the others to Governor Brownback so he knows that Americans from coast to coast, including **you**, want him to reject fear-mongering and show support for those fleeing horrific oppression.

I hope you'll join us today and help to make an ongoing difference.

Please join Human Rights Watch with a donation of \$35 or more to help us uphold human rights across the world.

(For a donation of \$50 or more, we'll send you in thanks a Human Rights Watch t-shirt with the words "Tyranny Has A Witness" in Arabic.)

Why stand with us? Because Human Rights Watch does something no one else can do: Get access at all levels—from victims on the ground to the highest levels of government—to make meaningful change. First, we *investigate*. We have over 80 researchers and more than 20 local offices worldwide. Then we *expose*. Our reports are so rigorous and unbiased that the

350 FIFTH AVENUE, 34TH FLOOR • NEW YORK, NY 10118-3299

HRW.org/join-now

RECYCLED PAPER

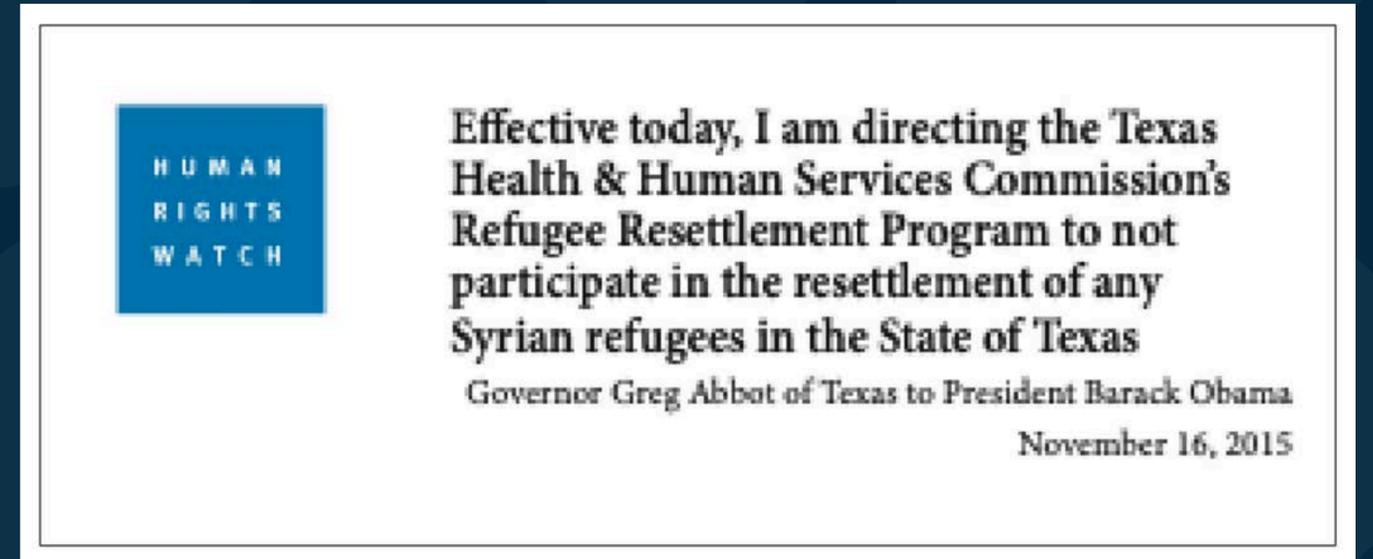
100% SOY INK

DMAW

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Johnson Box:

- A Johnson Box is commonly found at the top of letters, containing the key message. Its purpose is to draw the reader's attention to this key message first, enticing them to read the rest of the letter.
- It has also been adapted to the email format, with the goal of ensuring the most attention-grabbing content in the email is visible in the preview pane of an email reader.



Developing Winning Acquisition Creative

Inserts:

- Support the ask and mission
- Inserts should never detract from the ask by asking prospects/donors to do something else – drive them online to take a survey, etc.



Welcome to the Conquer Cancer Community!
Thank you so much for your generous support. We are thrilled to have you join us as we strive to conquer every cancer, for every patient, everywhere. Together, we're funding breakthrough research into disease, treatment, and vital programs for people with cancer.

Your generosity changes lives and enables us to expand the horizons of cancer research in ways that were previously unimaginable. With your help, we're advancing cancer care by funding groundbreaking research, innovative clinical trials, new therapies, and more.

Thanks to the compassion and generosity of people like you, Conquer Cancer®, the ACCO Foundation, is that much closer to creating a world where cancer is preventable or curable, and every patient is healthy.

Thank you for joining us at this moment!

Nancy E. Raley
Nancy E. Raley, MD, MPH
Chief Executive Officer

Making Bold, New Scientific Ideas a Reality
New and better cancer treatments can't happen without the compassionate support of people like you. Your generosity is the catalyst that turns sweet ideas into action, and ideas into life-saving treatments and cures.

Your gift is already helping to accelerate cancer research by funding oncologists who are:

- **Pushing** new ground in treatment and prevention for every cancer.
- **Facilitating** research for every type of cancer, including supportive care practices, with remarkable results.
- **Providing** an informative hub for people living with cancer, their caregivers, and more.

Leading the Way in Cutting-Edge Times
Thanks to new breakthroughs like artificial intelligence, the field of oncology is rapidly changing. At Conquer Cancer, we're committed to supporting the most innovative work from start to finish. Your gift catalyzes **advancements that save lives and forever change the conversation around cancer care.**

For example, in 2022, we provided funding to support the research of Dr. Gill Sauter-Peterson, who's exploring how artificial intelligence can be used to analyze breast MRI and identify areas at high risk of cancer recurrence. The future of conquering cancer will require transformative imaging and diagnostic tools, and, thanks to you, the future is here.

Building Hope for Every Patient
Your gift changes the lives of patients everywhere, no matter their diagnosis.

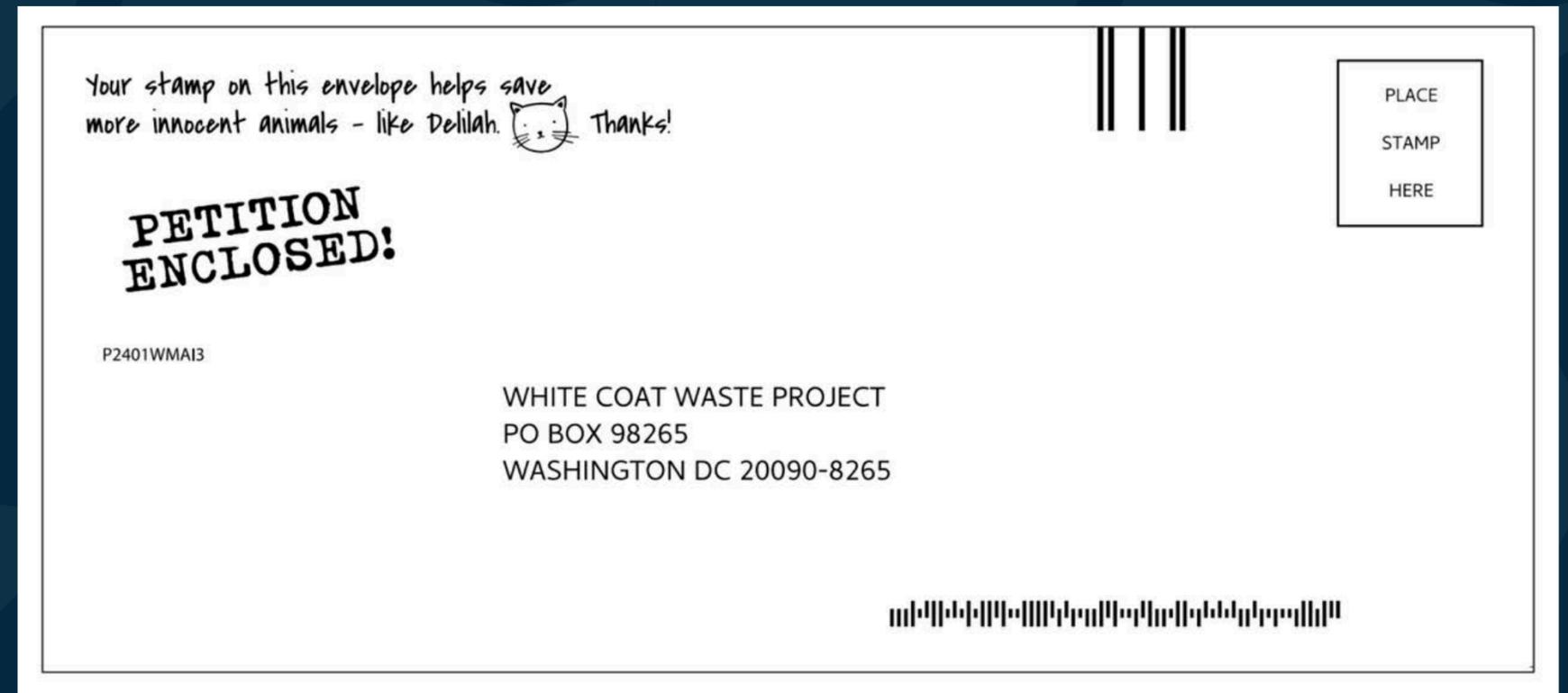
We work globally and fund research for every cancer. When we have time to better support our cancer, those lessons can often be applied across specialties, inspiring more informed research that we all benefit from.

Conquering cancer requires that we all join together. We're thankful you're on the team, too.

Developing Winning Acquisition Creative

Reply Envelope:

- Fits in carrier
- Reply device fits in the envelope
- Postage treatment



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Copy – The Lede

Outline the **main points of the whole story** in its **first paragraph** and answer the five w's:

- Who
- What
- When
- Where
- Why

Copy – The Ask

There should always be an ask on page one.

An ask for a donation.
Give them three amounts because nine out of ten times they'll go for the middle one, if you only give two they will go for the lower \$ amount.

Copy – The Ask

Always add a P.S. or postscript to your letter.

- There are two parts most recipients read first. Their name and address, then they jump to the back page to see who it's signed by and read the PS.
- This is an area to reinforce your ask and the WIFM(What's In it For Me?).

Developing Winning Acquisition Creative

Copy – Language

This isn't a term paper or scholarly article.

Your letter's language needs to be somewhat vernacular and more personal/conversational.

- I wouldn't fuss too much about proper grammar. Correct Spelling yes—correct facts absolutely



Copy – Donor Focused

Why should they care?

WIFM

- What's In It For Me?

Developing **Winning Acquisition Creative**

Rules for online change on a seemingly daily basis with changes in content restrictions, BUT...

Developing **Winning** Acquisition Creative

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- Digital is an instant-consumption medium; most people read an email for 3 seconds only, and spend even less time looking at a digital ad.

Developing **Winning** Acquisition Creative

Rules for online change on a seemingly daily basis with changes in content restrictions, BUT...

- Digital is an instant-consumption medium; most people read an email for 3 seconds only, and spend even less time looking at a digital ad.
- Call out common creative phrases across the two channels and also where the differences are.

Developing Winning Acquisition Creative

The image displays two side-by-side acquisition creatives. The left creative is a blue and white advertisement for a Bible prophecy course. The right creative is a black and white advertisement for Doctors Without Borders, featuring a photograph of children in Gaza and a red 'LEARN MORE' button.

Left Creative:

Check out my brand-new free Bible prophecy course!

ptv.org
Activate your free online course today » [Learn more](#)

Right Creative:

ACCESS TO CLEAN WATER IS NOW
EXTREMELY SCARCE IN GAZA

[LEARN MORE](#)

MEDECINS SANS FRONTIERES
DOCTORS WITHOUT BORDERS

PHOTO: MOHAMMED ABED, OCTOBER 12, 2023 ©

Measuring Success

- Focus on outcomes not outputs



Measuring Success

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- Key metrics are channel agnostic



Measuring Success

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- Key metrics are channel agnostic
- Avoid vanity metrics
 - Metrics that measure outcomes, but not the desired outcome
 - Email open rate—is your desired outcome to get email opens?
 - Click rate, followers, impressions, and exposures are often vanity metrics

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- Avoid ROI, especially in acquisition
 - Acquisition is the investment
 - The return comes later, with resolicitation
- What is the desired outcome in acquisition?

Measuring Acquisition Success

- Goal of acquisition—to acquire as many qualified donors as possible at an acceptable cost
- Key metric—cost per donor or cost per acquisition (CPD, CPA, CPO)
 - Note: Avoid ROI

Measuring Acquisition Success

Cost Per Donor/Cost to Acquire Calculation (Total Revenue - Total Costs) / Donors

- Total revenue—all of the revenue from this campaign
 - Across all channels, if this is a multi-channel campaign
- Total costs—all of the costs from this campaign
 - Media (postage), list, production, backend premiums
 - Agency, creative design and execution, staff
 - Across all channels

Measuring Acquisition Success

Cost Per Donor/Cost to Acquire Calculation (Total Revenue - Total Costs) / Donors

- Donors – number responses from (new or reactivated) donors attributed to this campaign.
 - Across all channels, if this is a multi-channel campaign
 - Incremental donors, when adding a new channel or effort

Measuring Success – Incrementality Calculations

- When adding a new channel or effort to a program with many existing channels and efforts.
- Measure the incrementality, the additional orders that the new channel or effort ads.
- A holdout test is the most common, simplest way to do this.

Thank You!!



Steven D. Fleshman
Founder/Creative Partner
DR2



Joe Harr
Marketing Strategist AARP



Victoria Heckler
Vice President Mal Warwick
Donordigital



Yanni Saratsis
Vice President, Client Services
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DMΔW

Lunch w/ Faculty

11:30 AM – 12:15 PM



Donor Retention: Keeping Your Donors Engaged



Joe Harr
Marketing Strategist AARP



Victoria Heckler
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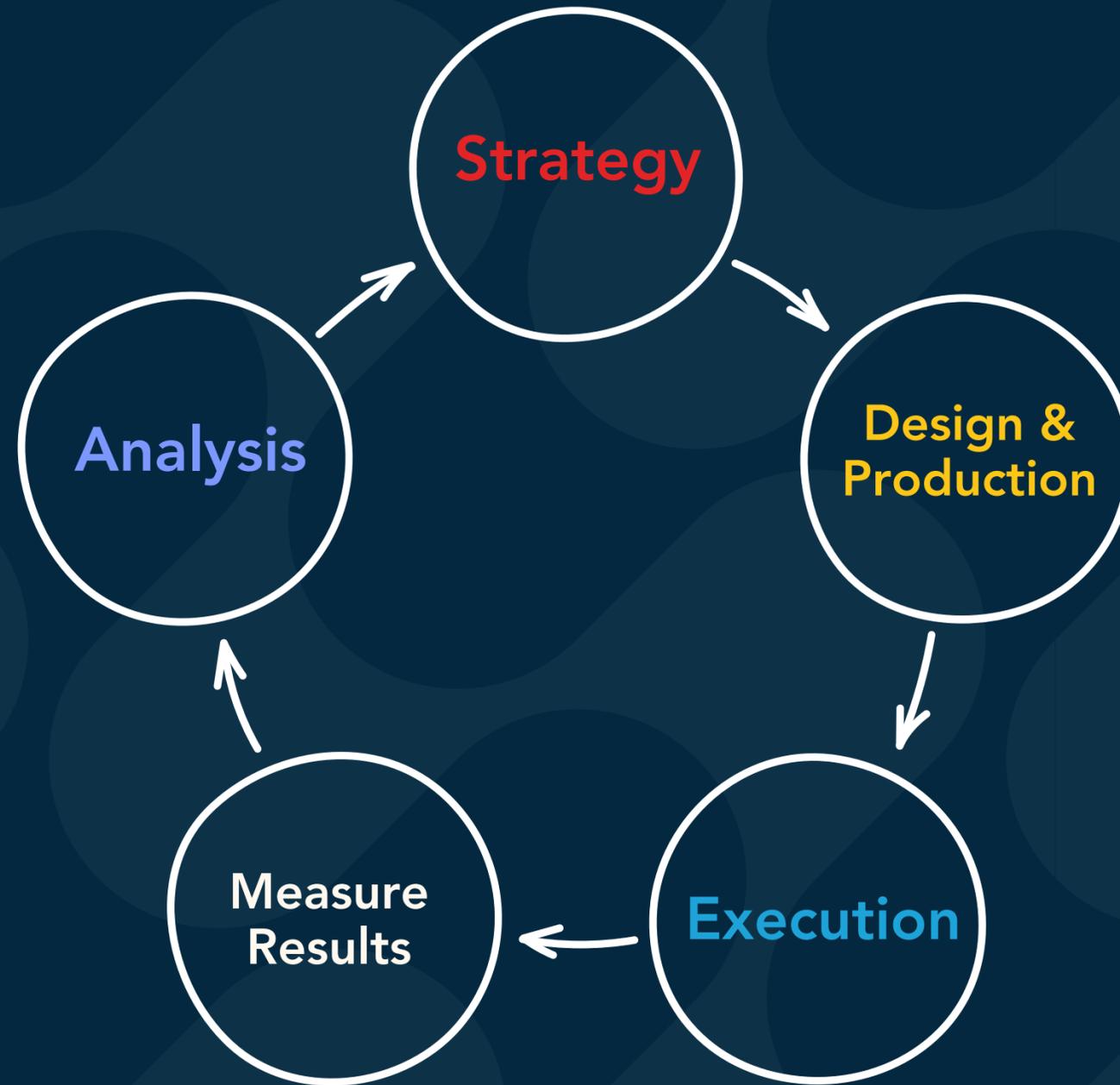


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Donor Resolicitation, Retention, and Upgrades



Using Data to Drive Strategy

- **RFM:** Recency (when a donor last gave); Frequency (how often or how many gifts a donor has given); Magnitude (what is the largest amount a donor has given). These are key metrics used in direct mail segmentation and analysis.
- **Segmentation:** Grouping subsets of donor data based on a defined set of parameters.

Donor Resolicitation, Retention, and Upgrades

- Focus on outcomes, not outputs
- Key metrics are channel agnostic
- Avoid vanity metrics
- If you must use ROI, now is the time to start measuring it
 - Acquisition is the investment
 - The return is all resolicitation, which is lifetime value
- What is the desired outcome in this campaign? For the donor? For the organization?

Donor Resolicitation, Retention, and Upgrades

How you define success depends on your desired outcome:

- Net revenue
- Net per thousand (NPM)
- Number of donors
- Donor retention
- Renewal rate
- Lifetime value or long-term value (LTV)
- Sustainer recruitment
- Mid-level and high-dollar cultivation
- Analysis lifecycle

Donor Retention: Keeping Your Donors Engaged

Metrics

- **Net revenue:** Total revenue less total costs; measures the profitability of one campaign or effort.
- **Net per thousand (NPM)** Net revenue/Number mailed (in thousands); used as a measure of fundraising effectiveness.
- **Number of donors**
- **Donor retention:** How many donors who gave last year gave again in this year; generally measured by donor life cycle?

Donor Retention: Keeping Your Donors Engaged

- **Donor life-cycle:** common descriptions for how long a donor has been affiliated with an organization. Generally New, 1st NewRenewed, Lapsed, Lapsed reactivated, Multi-year (often broken-out in 2 year, 3 year 4 year and 5+ years)
- **Renewal rate:** percentage of universe that renew their support; may also be referred to as a conversion rate or reactivation rate depending on the type of campaign.
- **Sustainer recruitment:** number of new or reactivated monthly donors that pledge in a campaign or effort.

Donor Retention: Keeping Your Donors Engaged

- **Long-term value:** The value of donors over a longer period of time. Typically measured in 3-year or 5-year increments.

What Does A Successful Donor Journey Look Like?

- A donor journey should be looked at from the perspective of a donor mountain, NOT a donor funnel.
- Why? You (the organization) needs to do the work to steward the donor up the mountain.
- When looking at acquisition, we like to follow the 'mountain' path

Your Goal



Your Donor

Your Goal



Your Donor

Your Goal



YOU are
the Guide!



Your Donor

Donor Retention

Acknowledgement – a letter or email recognizing a donor's recent gift.

Cultivation (sometimes used interchangeably with "stewardship") – the process of building a relationship with your donor(s), engaging with them, and getting them to give again (and again). In direct marketing lingo, "cultivation" often refers to a type of communication with a donor that **does not** include a hard ask – an envelope is not an ask.

Donor Retention

Donor Journey/Experience – the sequential path an organization’s supporters follow to learn about your organization, become interested in its mission and goals, are motivated to give, and remain engaged with the organization afterward (so they can continue to give).

Retention – engaging existing donors so that they continue to support your organization year after year.

Donor Retention – Donor Experience

Acquisition

Donor Retention – Donor Experience

Acquisition

Thank You

Donor Retention – Acknowledgement Program

- Elements of Winning Ack Program
 - Timing/Turnaround–As quickly as possible!
 - Which gifts to acknowledge?
- Legally–gifts of \$250+
 - Best Practice–All gifts should get a (hard copy) acknowledgement if your org can manage it
 - To save on cost, consider email acks for online donors.
- Separate Welcome Series
 - May be first gift or new giving level or club, monthly donors.

Donor Retention – Acknowledgement Program

- An acknowledgement is more than just a tax receipt; it is a relationship-building tool—personalization, conversational & grateful tone.

Donor Retention – Acknowledgement Program

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- Second Gift Conversion – to include or not to include (what's right for your org)?

Donor Retention – Acknowledgement Program

- An acknowledgement is more than just a tax receipt; it is a relationship-building tool—personalization, conversational & grateful tone.
- Second Gift Conversion – to include or not to include (what's right for your org)?
- How to get repeat gifts – ASK!

Donor Retention – Donor Experience

Acquisition

Thank You

Second
Gift Ask

Donor Retention – How to Get Second, Third Gifts?

- **Channels are similar, strategies will differ.**
 - Copy–tone, topics, and art might all be different.
 - Acknowledge that they've already given and address why you still need more \$\$ NOW (urgency is key).
 - Include the impact of giving.

Donor Retention – How to Get Second, Third Gifts?

- **Personalization**

- Since you have more info on donor, can be more specific.
- Ask amounts.
- Name, previous gifts, potentially specific interests, etc. Too much can feel forced and be counter-productive.

Donor Retention – How to Get Second, Third Gifts?

- **Personalization**

- Since you have more info on donor, can be more specific.
- Ask amounts.
- Name, previous gifts, potentially specific interests, etc. Too much can feel forced and be counter-productive.

- **Timing**

- Reneals vs. Addt'l asks.

Donor Retention – Donor Experience

Focus on Big Milestones!

Acquisition

Thank You

Second
Gift Ask

Cultivation

Winning Cultivation Strategies

- “People give to people.”
- Gratitude Messages: phone; written; email; text.
- Impact Reporting: describe the impact of donors’ gifts.
- Anniversary/Milestone Acknowledgements.
- 1-to-1 Communications vs. Mass Marketing.
 - “Handwritten” notes/personalization and emails that are plain text.
 - Segmentation & Targeting for Cultivation.
 - You don’t need to do ALL of this for EVERYONE—but you should be doing SOME of this for EVERYONE.
 - Real Pen Personalization, Handwritten fonts, Digital Printing.

Donor Retention – Donor Experience

Focus on Big Milestones!

Acquisition

Thank You

Second
Gift Ask

Cultivation

Appeals/
Renewals

Donor Retention – Donor Experience

Focus on Big Milestones!

Acquisition

Thank You

Second
Gift Ask

Cultivation

Appeals/
Renewals

Upgrade
Asks

Thank You!!



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NextAfter

DMAW

Refresh & Networking w/ Faculty

1:35 PM – 1:45 PM



DMAW

Roundtable Discussion w/ Faculty

1:45 PM – 2:00 PM



Donor Upgrades: Inspiring Your Donors to Give More!



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Donor Upgrades

- **Pipeline Upgrades (low\$>midlevel>major>legacy).**
 - This is where multichannel efforts should be the focus—offline and online can work in concert to try and upgrade donors.
 - A lot of your major donors started their lives as small, \$10 donors, and have been cultivated over the years to grow their giving.
 - Don't ignore those small donors!
 - If your email system supports it, you can create an automated email series toward donors (also known as a "drip" campaign).
- **Sustainer** (upgrade by frequency).
- Marketing specifically for "other" ways to give—DAF gifts, IRA, stock gifts, crypto, etc.

Donor Upgrades: Inspiring Your Donors to Give More

- **Upgrade:** Marketing efforts tied to increasing the donors' value to the organization. Both increasing gift frequency.
- **Cultivation:** The process of learning about, engaging with, and ultimately converting your audience into repeat supporters.
- **Stewardship:** Donor stewardship is the relationship-building process that occurs after a donor makes a gift. The main purpose of stewarding your donors is to inspire them to give again.

Donor Upgrades: Inspiring Your Donors to Give More

- **Donor Advised Fund (DAF):** A charitable investment account for the sole purpose of supporting C3 charitable organizations.
- **Sustainer:** Regular support of the organization. Generally, monthly, although donors can give quarterly or annually.
- **HPC:** Highest Previous Contribution. Maybe time-bound for example HPC24.
- **MRC:** Most Recent Contribution. The last gift a donor has made. Also called **MRG**.

Donor Retention – Donor Experience

Focus on Big Milestones!

Acquisition

Thank You

Second
Gift Ask

Cultivation

Appeals/
Renewals

Upgrade
Asks

Sustainer
Invitation

Anatomy of a Successful Sustainer Program

- Make sure your internal processes can accommodate monthly givers:
 - Acknowledgements
 - Cultivation
 - Recapture
 - Maintenance
 - Upgrades
 - Customer Service
 - Database/CRM

Anatomy of a Successful Sustainer Program

- Invitation/Acquisition
 - Online/Email
 - Direct Mail
 - Telemarketing/SMS
 - Face to Face
 - DRTV/Connected TV

Anatomy of a Successful Sustainer Program

Stewardship/Cultivation

Upgrading

Receipting/Acknowledgement

- Annual Receipts
- C3 vs. C4 \pm – do you acknowledge C4 sustainers?
- Online Sustainers – Automated Thank You after each gift?

Anatomy of a Successful Sustainer Program

- 1x Asks in Appeals – frequency and call out their monthly support.
- Think through how and when a sustainer is communicated with . . .do you add them to all mailings/emails/digital targeting? Do you leave them off in general but add in select appeals?
- And don't ask them to become a sustainer in a 1-time appeal.

Donor Retention – Donor Experience

Focus on Big Milestones!

Acquisition

Thank You

Second
Gift Ask

Cultivation

Appeals/
Renewals

Upgrade
Asks

Sustainer
Invitation

Legacy
Giving Ask

Donor Retention – Donor Experience

Focus on Big Milestones!

Acquisition

Thank You

Second
Gift Ask

Cultivation

Appeals/
Renewals

Upgrade
Asks

Sustainer
Invitation

Legacy
Giving Ask

Engagement/
Volunteer
Opportunities

Using Data to Drive Strategy

- **RFM:** Recency (when a donor last gave); Frequency (how often or how many gifts a donor has given); Monetary or Magnitude (what is the largest amount a donor has given). These are key metrics used in direct mail segmentation and analysis.
- **Segmentation:** Grouping subsets of donor data based on a defined set of parameters.

Midlevel & Major Marketing Strategies

- “Midlevel” vs. “Bridge”
 - Midlevel programs should be deliberate—not an afterthought; should not be “shoehorned” into or out of the low\$ DM program schedule.

Midlevel & Major Marketing Strategies

- **Successful Strategies**

- Acquisition—either by upgrading from low\$ DM or specifically targeting via acquisition channels.
- You need to ask to get—do not gatekeep your midlevel donors.
 - Most of these donors upgraded from low\$ DM—don't stop mailing them, maybe email them in a different fashion.
- Layer on personalization and personal contact—midlevel donors like to feel connected to your organization – give them “insider access.”
 - Newsletters, briefings, Zoom calls, meetings, they like to be in the know.

Midlevel & Major Marketing Strategies

- Treat them like “investors”–they’re “shopping for impact.”
 - Midlevel donors are seeking out a peer group-folks that share their philanthropic interests.
 - Many midlevels are just starting out in their philanthropy – they looking to the orgs they support for guidance on how to spend their charitable \$\$\$
 - DAFs – market to donors who have given via DAF in the past, etc.
- Making the jump to Majors
 - How has this changed since the pandemic, with the lack of in-person contact?
- Contact Cadence

How Does Planned Giving Relate to Direct Response Fundraising

- Direct Response donors are generally excellent PG prospects.
- Most of the planned gifts are coming from direct response donors.
- Purposeful about marketing PG to the direct response.
- Opportunities outside of development in newsletters, etc.

Planned Giving – Key Definitions

- **Planned Gift:** a gift, current or deferred or both, that is not made from cash/credit cards but rather from assets. 90%+ of all “planned gifts” are legacy gifts in a will or living trust.
- **Bequest:** a deferred gift of money or assets under the terms of a will (or a living trust).
- **Legacy Gift:** a gift that arrives after a donor’s lifetime. Includes bequests and beneficiary designations, and donor can change their plan at any time. (**CGA**)

Planned Giving – Key Definitions

- **QCD:** Qualified charitable distribution or IRA Rollover gift. A current (lifetime) gift made directly from a donor's IRA to charity. Only available to donors aged 70.5 or older.
- **Beneficiary Designation:** a deferred gift made when a charity is named as the recipient of life insurance proceeds or retirement plan benefits after the person's lifetime.

PG Marketing Is Still Marketing...

- **Lead Generation**
 - Identify donors with a propensity for leaving a planned gift.
- **Qualification**
 - Confirm interest & timing.
- **Cultivation**
 - Maintain relationship and interest between donor and organization.

PG Marketing Is Still Marketing...

- **Solicitation**

- Asking for the right legacy gift at the right time (when donor is creating or updating estate plan).

- **Stewardship/Retention**

- Over 40% of legacy gifts will be lost to attrition.
- Overall organization stewardship is more important than legacy-specific stewardship.

...With A Few Key Differences

1. Donors do not have to reply.
2. Campaign results are not monetary and can be harder to measure.
3. Response metrics are different.
4. ROI cannot be measured campaign by campaign.
5. There are 3 lifetime opportunities to make a gift—marketing impact is cumulative:
 - a. Now: Stocks, Bonds, Real Estate, or other property.
 - b. Split Interest: Gift Annuities, Charitable Trusts, Pooled Income Fund.
 - c. Deferred: Life Insurance, Retirement Plan Benefits, Bequests.

Thank You!!



Joe Harr
Marketing Strategist AARP



Victoria Heckler
Vice President Mal Warwick
Donordigital



Steven Kehrl
Sr. Vice President, Development
PETA Foundatiion



Yanni Saratsis
Vice President, Client Services
NextAfter

DMΔW

Refresh & Networking w/ Faculty

3:00 PM – 3:15 PM



DMAW

Roundtable Discussion w/ Faculty

3:15 PM – 3:30 PM



Where Do We Go From Here?



Steven D. Fleshman
Founder/Creative Partner
DR2



Joe Harr
Marketing Strategist AARP



Victoria Heckler
Vice President Mal Warwick
Donordigital



Steven Kehrli
Sr. Vice President, Development
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Yanni Saratsis
Vice President, Client Services
NextAfter



Amy Sukol
Principal Lautman
Maska Neill & Co.



Teresa Weaver
Vice President, Client Strategy
O'Brien Garrett

Where Do We Go From Here?

How can you continue your own educational journey?

- DMAW Events
- Mentorship
- Podcasts

What trends do we see on the horizon?

- Multi-channel
- AI

Words of Wisdom From The Pros

1. If your organization is not asking your donors for a gift, someone else is.
 - a. The median # of organizations a donor supports: A donor may have the capacity to make big gifts, but may have only a small interest in your organization.
2. Your donor isn't keeping a scrapbook of what you mail them.
3. If you aren't giving to organizations yet—start! You'll learn a lot about fundraising in the process.
4. The only reason not to give to charity is because you need charity.
5. You are not your target audience...just because you (or the org) doesn't like creative because of a personal bias, doesn't mean it won't work. **TEST TEST TEST**



Thank
You!

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Closing Remarks



Victoria Heckler, Vice President Mal Warwick Donordigital



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