

DMAW

Fundraising Fundamentals 201

February 19, 2026 | 8:30a – 4:30p



DMAW

Opening Announcements & Welcome Remarks



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

Thank You to Our Committee & Faculty



Nosa Adetiba

Director, Nationwide Donor Development
ACLU



Robert Connelly

Senior Vice President
Integral, LLC



Kylee Lorio

Associate Director of Digital Marketing,
Human Rights Watch



Fernando Santos

Director, Development & AI Solutions,
4Site Studios



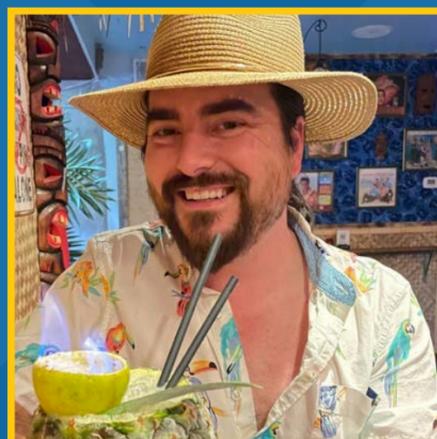
John Blackwell

Director, Strategic Analytics, Membership,
The Nature Conservancy



Rebecca Sparenberg

Vice President of Digital Marketing
Humane World for Animals



Bryan Casler

Vice President, Digital Strategy
4SiteStudios



Amy Sukol

Principal
Lautman Maska Neill & Co.



Victoria Heckler

Vice Presiden
Mal Warwick Donordigital



Teresa Weaver

Vice President, Client Strategy
O'Brien Garrett



Thank You to
Our Sponsors!



PMG

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!

Finding calm in the chaos.



Bridge to Integrated Marketing & Fundraising Conference
Gaylord National Hotel & Convention Center
National Harbor, MD | July 29-31, 2026

Where Fundraising, Marketing & Innovation Connect

July 29–31, 2026 • National Harbor, MD

Join thousands of nonprofit leaders for breakthrough ideas, compelling education, and powerful networking.

Program details: 2026bridge.eventscribe.net



DMAW

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!

Welcome & Learning Objectives

What You'll Learn Today:

1. How integrated direct response works across channels
2. How to overcome challenges and seize opportunities in today's fundraising landscape
3. Advanced tactics simplified for practical use
4. How to apply data, testing, and creative strategy in your own programs

Overview of Direct Response

What is "Direct Response"?

Core Channels:

Mail, Digital, Phone, DRTV, Social, Face-to-Face

Goals:

Measurable Response and Long-Term Donor Value, Faculty Roundtable

DMAW Roundtable Discussion #1



Direct Response Acquisition: Advanced Strategies & Breakthroughs



Robert Connelly

Senior Vice President
Integral, LLC



Nosa Adetiba

Director, Nationwide Donor Development
ACLU



Rebecca Sparenberg

Vice President of Digital Marketing
Humane World for Animals

(Re)grounding... acquisition 201

- Acquisition is important beyond getting new donors
- Bring in the right donors, right time, but with the right expectations
- It's an investment, not a revenue center
- Success measured over time

Understanding Acquisition Today - The Challenges

- Rising costs
- Declining response rates
- Shrinking Donor Files
- Data privacy laws
- Internal pressure for immediate ROI

Understanding Acquisition Today - The Opportunities

- Smarter targeting
- Multi channel entry points
- Smarter testing
- Data data data!

Prospect List Sources

- Outside Lists
 - List rentals/exchange
 - Co-ops & modeled lists
 - Paid digital ads
 - Multi-channel co-ops
 - Digital co-ops
- House Lists
 - Deep lapsed
 - Survey responders
 - E-activists

Understanding Acquisition Today

Acquisition is an investment, not a revenue center. Success should be measured over time.

Challenges (and how to overcome them):

- Rising costs
- Declining response rates
- Shrinking Donor Files
- Data privacy laws
- Internal pressure for immediate ROI

Opportunities (*and how to take advantage of them*):

- Smarter targeting
- Channel innovations

Multi-Channel Integration

- **Mail + Digital = Stronger results**
 - Example: retargeting direct mail responders online
- **Telemarketing**
- **Methods for Evaluating Results & KPIs**
- **Why invest in acq? in diff channels?**
- **Testing strategies**

What's Worthy of Testing

Focus your testing on variables that can **unlock scale, shift strategy, or improve ROI** — not just surface-level optimizations.

Great tests challenge assumptions, inform investment decisions, and help future-proof your acquisition mix.



Use a Simple Testing Framework

Test what informs decisions, not just what creates noise.

Use a simple framework:

- **Channel** – Does this new channel open up a sustainable source of volume?
- **Audience** – Are we reaching a segment with higher value or retention?
- **Creative/Messaging** – Are we framing our offer in a way that increases conversion?

Example:

Rather than testing envelope colors in Direct Mail, test whether a new audience segment or a higher-urgency message can lift response and long-term value.

Types of Data in Fundraising

Donor Data

Donor data encompasses information about individuals or organizations that contribute to fundraising efforts.

This data is crucial for building relationships and understanding donor behavior.

Donation Data

Donation data includes details about the contributions made by donors, such as amounts, frequency, and payment methods.

Analyzing this data helps organizations identify trends in giving.

Engagement Data

Engagement data refers to information about how donors interact with fundraising campaigns, including email opens, event attendance, and social media interactions. This data informs future strategies.

What's Worthy of Testing

Interpreting Data

Data analytics focuses on interpreting collected data to extract meaningful insights that guide decision-making and strategy development.

Analyzing Donor Behavior

Understanding donor behavior is crucial for organizations to tailor their fundraising strategies and maximize contributions.

Campaign Performance Analysis

Analyzing campaign performance metrics helps organizations evaluate their effectiveness and improve future initiatives.

Demographic Trends

Identifying demographic trends allows organizations to understand their audience better and customize their approaches for greater impact.



Case Study #1

Started with a viral ad the ACLU ran in the New York Times the day after the election

Dear President-elect Trump:

In case you had any doubt,

**WE ARE THE
AMERICAN CIVIL
LIBERTIES UNION.**

And we're not moving to Canada.

So, rest assured that when you target immigrants, dissidents, and your political opponents – we will challenge you in the courts, at state legislatures, and in the streets.

Surely, you remember the landmark lawsuits we won against you on family separation, the U.S. Census, and immigrants' rights – some of which were decided by judges you appointed.

During your last presidency, we brought 434 legal actions, including 250 lawsuits, against your administration's anti-civil liberties agenda.

We also mobilized the power of our more than 1 million card-carrying members into the streets, at airports, and in state capitals.

We've developed a comprehensive roadmap to defend our rights beginning on day one. We're not new to this.

At the ACLU, we play the long game. We've been around for 105 years and seen 19 presidents come and go.

That's why any attempt to roll back the nation's civil liberties on our watch will be hard fought and met with the full power of our resistance.

Steadfast and determined to make ours
a more perfect union,
we remain,

THE ACLU

Created a winning Acquisition Co-Control that included a poster-sized reproduction of the ad

ACLU 125 BROAD STREET, 18TH FLOOR
NEW YORK, NY 10004-2400
ACLU.ORG/REPRESENT

NONPROFIT ORG.
U.S. POSTAGE
PAID
ACLU

YOUR RIGHTS. OUR MISSION. JOIN US.

Ms. Jennifer A. Donor
Address Line 1
Address Line 2
Address Line 3
Address Line 4
Address Line 5

Printed on Recycled Paper 064-YR

ACLU 125 BROAD STREET, 18TH FLOOR
NEW YORK, NY 10004
ACLU.ORG/REPRESENT
ANTHONY D. ROMERO
EXECUTIVE DIRECTOR

We're not moving to Canada.
We're staying here to fight.
Will you join us?

Dear Friend,

The American Civil Liberties Union (ACLU) and those who fight with us, are making it clear to the Trump administration that we are here to stay.

Today, my question to you is: will you join us?

By becoming a member today, you will ensure that when the new administration attempts to separate immigrant families, restrict access to abortion and reproductive healthcare, or weaponize the federal government against protesters and political opponents, the ACLU will be there to fight back.

Join us. Please rush your gift of \$35, \$50, \$100, or more today.

Become the newest card-carrying member of the ACLU, joining steadfast and determined supporters defending our rights and freedoms.

Make no mistake about it, the Trump administration poses a threat to our fundamental freedoms. The fear that so many of us are feeling right now is very real.

At the ACLU, we're channeling fear into action. We believe that, together, we are powerful enough to change the course of our nation's history and defend our most fundamental rights and freedoms.

That is why the ACLU has a concrete plan to fight back. When President Trump comes for our communities, he's gotta get past all of us.

- If they try to take birth control off the shelves and prosecute abortion providers, we will continue to fight for reproductive healthcare in the courts, in Congress, and in the states. On election day, Missourians voted to end the state's total abortion ban. The ACLU was in court right away to demand that access to abortion in the state be restored without delay.

Dear President-elect Trump:

In case you had any doubt,
WE ARE THE AMERICAN CIVIL LIBERTIES UNION.
And we're not moving to Canada.

So, rest assured that when you target immigrants, dissidents, and our political opponents — we will challenge you in the courts, at state legislatures, and in the streets.

We also mobilized the power of our more than 1 million card-carrying members into the streets, at airports, and in state capitals.

Surely, you remember the landmark lawsuits we won against you on family separation, the U.S. Census, and immigrants' rights — some of which were decided by judges you appointed.

We've developed a comprehensive roadmap to defend our rights beginning on day one. We're not new to this.

During your last presidency, we brought 434 legal actions, including 250 lawsuits, against your administration's anti-civil liberties agenda.

At the ACLU, we play the long game. We've been around for 105 years and seen 19 presidents come and go.

That's why any attempt to roll back the nation's civil liberties on our watch will be hard fought and met with the full power of our resistance.

Steadfast and determined to make ours a more perfect union,
we remain,
THE ACLU

WE ARE THE AMERICAN CIVIL LIBERTIES UNION AND WE'RE NOT MOVING TO CANADA

ACLU MEMBERSHIP ACCEPTANCE
125 BROAD STREET, 18TH FLOOR • NEW YORK, NY 10004-2400 • ACLU.ORG/REPRESENT

Yes, I want to help the ACLU protect the civil liberties that we hold so dear during the Trump administration. I have signed my pledge and am joining the ACLU with a gift of:

\$35 \$50 \$75 \$100 \$250 \$500 Other \$ _____

Mrs. Jane D. Sample Card
123 Main Street
Apt 456
Anytown, US 12345-6789

MAKE IT MONTHLY! (See reverse)
 I want to get the latest news about the ACLU. My email address is: _____

To donate by credit card, visit ACLU.ORG/REPRESENT or complete the reverse side of this form. Make checks payable to the ACLU, and return in the enclosed envelope. Contributions to the ACLU are not tax deductible for charitable purposes. Thank you!

XXFINDERXXXXX XXSOURCECODEXX

Sign this pledge and return it with your gift today

THE MOMENT TO ACT IS NOW

I am proud to take my place as an ACLU member, committed to working to protect civil liberties against the threats posed by the Trump administration. I know that I am part of a movement that is ready to defend the rights that define our nation and to protect the most vulnerable in our communities.

SIGNED: _____ <Account Name>

Outcomes

Increased response rate by 58% and average gift by 26%

Improved ROI by over 200%

Think of Digital Acquisition Holistically

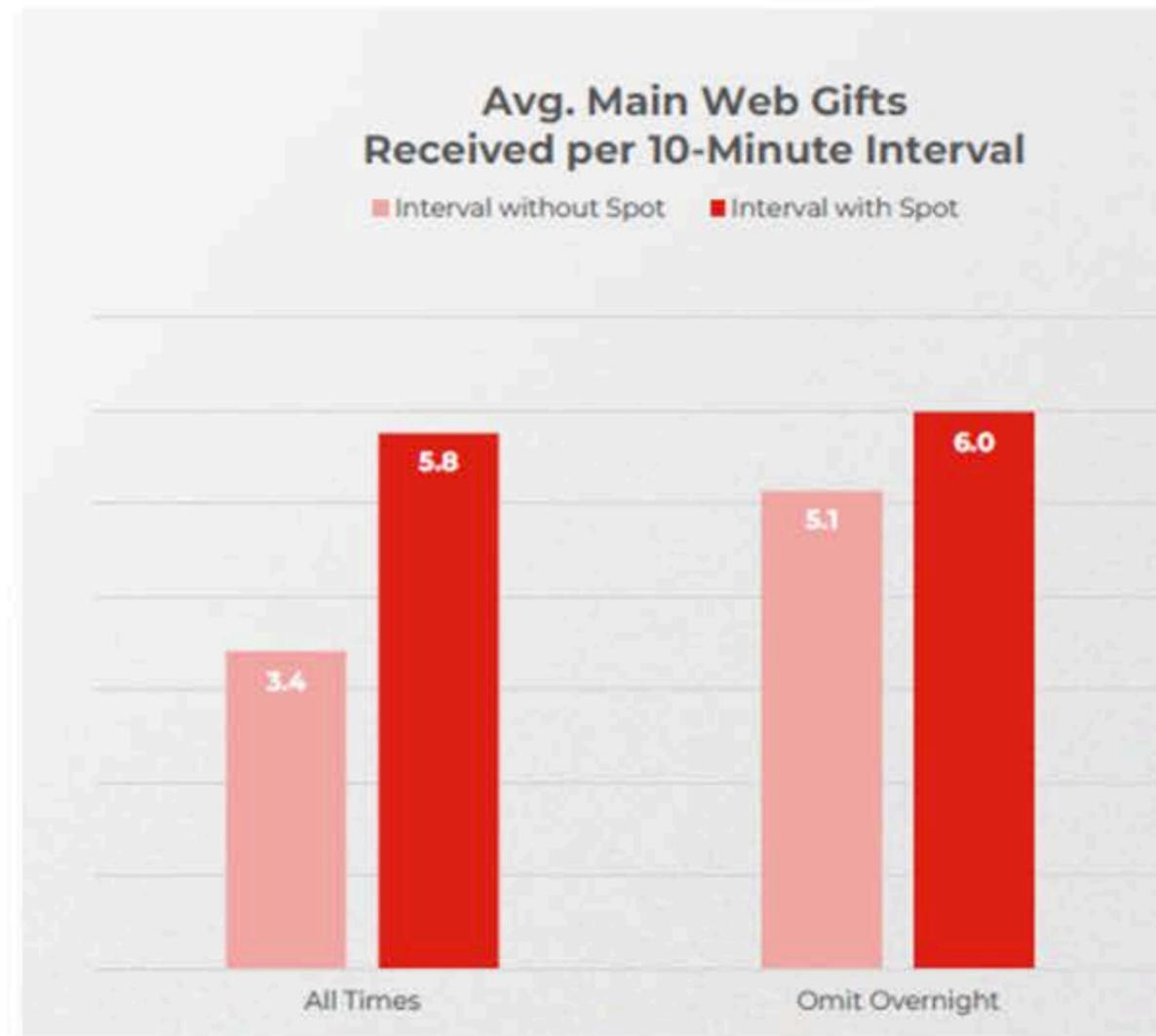
	Channel	CPD	NPDMos01	NPDMos06	NPDMos12	NPDMos18	NPDMos24	NPDMos36	NPDMos48	NPDMos60	CPD
One-Time	Web		\$128.94	\$138.16	\$153.11	\$160.37	\$167.92	\$177.94	\$185.53	\$192.69	\$0.00
	Paid Search	\$173.00	(\$0.01)	\$13.49	\$34.85	\$43.74	\$54.40	\$68.83	\$87.56	\$107.71	\$173.00
	META	\$212.00	(\$136.10)	(\$124.56)	(\$114.88)	(\$108.81)	(\$104.31)	(\$99.13)	(\$94.05)	(\$89.02)	\$212.00
	Email		\$142.30	\$165.67	\$197.31	\$215.35	\$232.24	\$257.29	\$279.46	\$293.49	\$0.00
	Display		\$147.83	\$179.47	\$187.39	\$192.19	\$196.52	\$204.75	\$212.27	\$218.58	\$0.00
			\$77.57	\$51.80	\$63.10	\$79.00	\$86.76	\$94.72	\$105.32	\$115.40	\$125.26
Sustainer	Web		\$72.67	\$202.92	\$328.52	\$436.00	\$533.13	\$694.14	\$820.06	\$926.15	\$0.00
	Display		\$39.65	\$189.22	\$334.54	\$478.89	\$611.46	\$850.29	\$982.15	\$1,102.17	\$0.00
	Paid Search	\$169.00	(\$116.67)	\$11.18	\$95.02	\$176.04	\$250.51	\$369.48	\$475.09	\$584.58	\$169.00
	META	\$187.00	(\$150.58)	(\$85.30)	(\$22.36)	\$31.51	\$80.19	\$160.88	\$223.99	\$277.16	\$187.00
	Email		\$44.18	\$177.09	\$314.10	\$447.99	\$558.28	\$773.46	\$947.34	\$1,096.08	\$0.00
			\$56.94	\$4.17	\$128.61	\$240.16	\$339.89	\$429.15	\$579.82	\$700.74	\$807.87
		\$74.78	\$45.36	\$71.97	\$100.81	\$121.02	\$139.98	\$169.55	\$194.63	\$217.65	\$74.78

Digital channels don't operate in silos — each touchpoint influences the others. It's critical to evaluate your investment holistically to maximize overall performance. Recognizing what drives donors to give is crucial for tailoring fundraising efforts and increasing contributions.

Last Click Attribution

Good for tracking cashflow, but bad at showing the whole story

- To evaluate whether DRTV is lifting giving behavior, we calculate the number of main web gifts within each 10-minute interval of the pilot period and categorize as including a DRTV spot or not.
- The average number of main web gifts received during intervals that featured a DRTV spot was 69% higher than the number received in intervals with no spot.
- With overnight airings from 2 AM through 9 AM excluded, the impact of DRTV airings was still 17% higher.



The Digital Marketing Mix

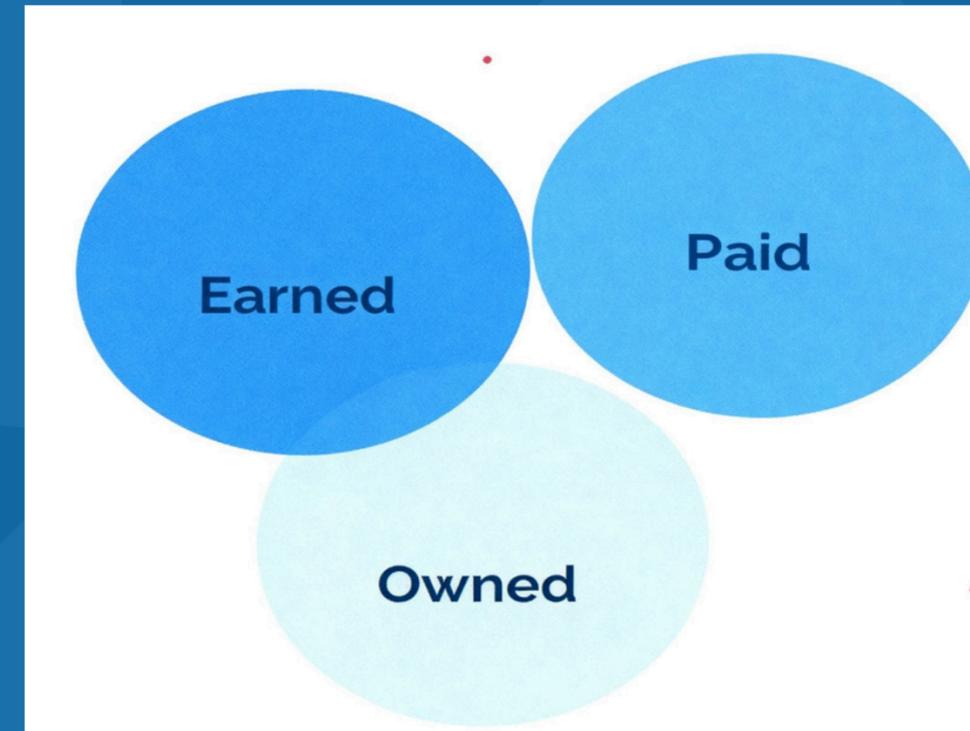
Earned:

- Social Shares
- Media/PR
- Influencer/Creator Content
- Guest Content (Blogs, Podcast)
- Search Engine Visibility (Organic search/backlinks)
- Word-of-mouth

Owned:

- Websites/ Blog (UX and SEO)
- Email/Newsletters
- SMS/Text
- Social Media Accounts
- Content Marketing (Podcast, videos, etc.)

Paid - (see next slide)



**Don't try an be
everywhere!**

Paid: Something for Everyone

Cost can vary depending on platform, scale and audience.

\$

Google Ad Grant
Paid Search
Social Media Advertising
Selective Display Placement

\$\$

Google Ad Grant
Paid Search
Social Media Advertising
Expanded Display Campaigns/Programmatic
Connected TV (CTV)
Audio Advertising

\$\$\$

Google Ad Grant
Paid Search
Social Media Advertising
Expanded Display Campaigns/Programmatic
Connected TV (CTV)
Audio Advertising
Premium CTV Placements
Digital Out-of-Home (DOOH)

Make Your Ads Work - Optimize for Revenue

- Structure for Success – Optimize for Conversions
- Target High-Value Donor Segments - Utilize Lookalike Audiences
- High-Impact Creative – Video Still Rules

KPIs	Revenue
	# Gifts
	Avg. Gift
	# Sustainer Gifts
	Total Sustainer Revenue
	NEW Sustainer Revenue
	% Sustainer Revenue
	NEW Donors
	NEW Sustainers
	NEW Leads from Ads
	Revenue from Ad-Generated Leads

Align channels with behavior and goals

Consider which channels play well together.

A generous donor will match your donation today up to \$50,000.

Humane World for Animals



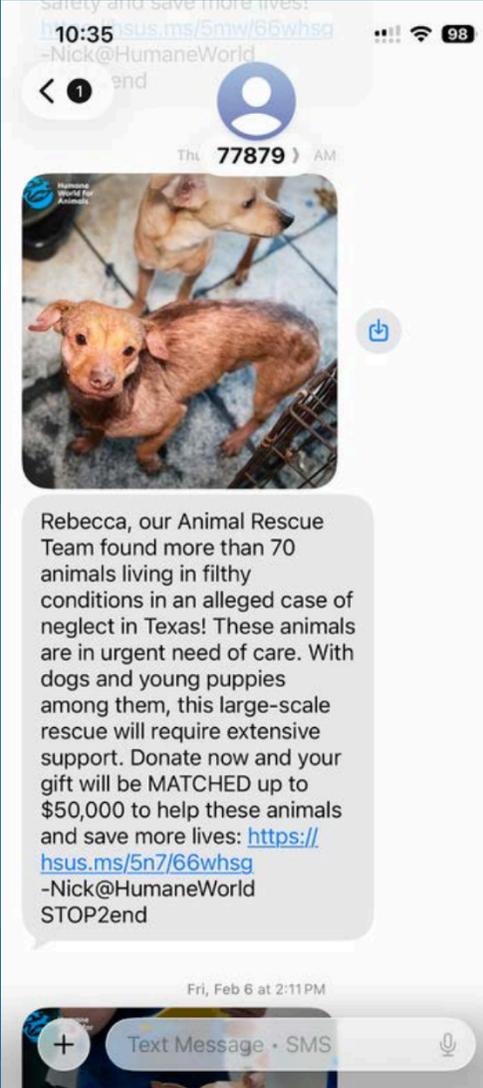
Rebecca,

Our Animal Rescue Team found more than 70 animals living in filthy conditions in an alleged case of neglect in Texas. These animals are in urgent need of care. With dogs and young puppies among them, this large-scale rescue will require extensive support.

A generous donor has stepped up with a \$50,000 match to meet the extraordinary demands of this rescue. Match funding will help provide emergency veterinary care, food and safe shelter for these animals, and support all our lifesaving efforts for animals in need. **Please give now to have your gift matched up to \$50,000.**

[Give Now](#)

10:35 sus.ms/5mw/66whsg
-Nick@HumaneWorld



Rebecca, our Animal Rescue Team found more than 70 animals living in filthy conditions in an alleged case of neglect in Texas! These animals are in urgent need of care. With dogs and young puppies among them, this large-scale rescue will require extensive support. Donate now and your gift will be MATCHED up to \$50,000 to help these animals and save more lives: <https://sus.ms/5n7/66whsg>
-Nick@HumaneWorld
STOP2end

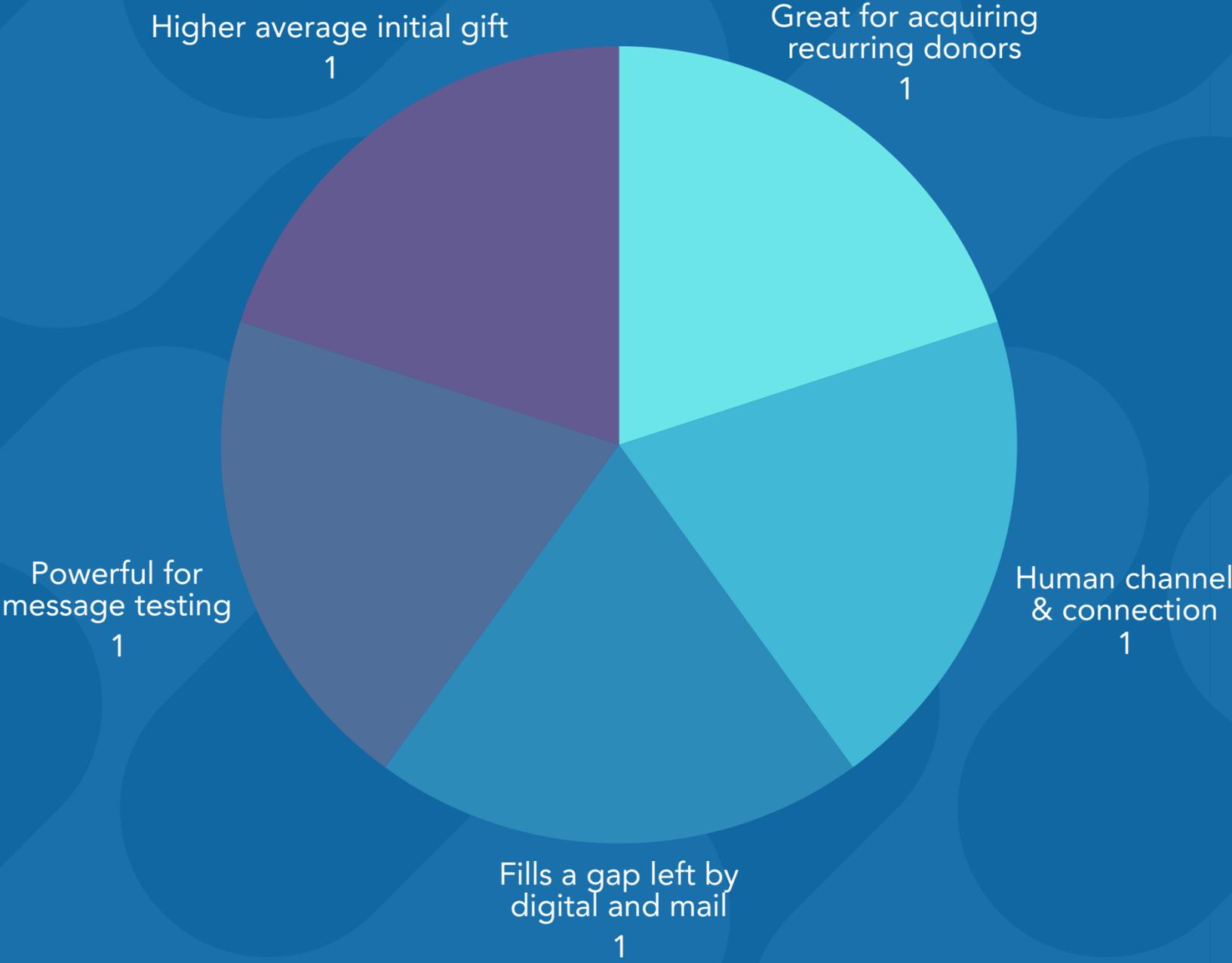
Fri, Feb 6 at 2:11 PM

Text Message • SMS

Overview of Digital Tactics

- Email
- Web Optimizations
- SMS Texting/P2P
- Paid social, search, lead gen, conversion paths
- Influencer Marketing
- Targeted Advertising
- Connected TV Ads
- DRTV

Telemarketing in 2026



Direct Mail vs. Telemarketing

While Direct Mail remains a familiar benchmark, this view helps reframe how we assess Telemarketing—positioning it within a broader, more strategic investment lens.

Channel	CPD	NPDMos01	NPDMos06	NPDMos12	NPDMos18	NPDMos24	NPDMos36	NPDMos48	NPDMos60	CPD
Direct Mail	\$121.00	(\$72.45)	(\$60.78)	(\$44.98)	(\$33.80)	(\$22.75)	(\$4.81)	\$9.60	\$21.79	\$121.00
Telemarketing	\$82.23	(\$43.02)	(\$42.25)	(\$33.23)	(\$24.66)	(\$17.09)	(\$0.24)	\$11.96	\$17.74	\$82.23

Best Practices for New Pros

Build relationships across the program and org



Learn the *Why*, Not Just the Tactic

- Ask what success looks like beyond the first gift
- Learn how acquisition connects to retention and upgrades



Respect the Economics Early

- Know your KPIs
- Learn what "acceptable" loss looks like in acquisition
- Understand payback and lifetime value basics



Optimize for Learning Before Scale

- Treat "losing" as information, not failure
- Test with intention



5 Key Take Aways

1. **Think Portfolio, Not Channel:** Evaluate acquisition investments as part of an integrated portfolio—no channel works in isolation.
2. **Cost Per Donor Isn't the Only Metric:** Consider long-term value, retention, and cross-channel impact, not just initial cost-efficiency.
3. **Test with Purpose:** Move beyond “test and learn” as a concept—design experiments that ladder up to strategic decisions.
4. **Know When to Scale:** Identify the signals that suggest a channel is ready for scale versus when it's best used as a niche tactic.
5. **Data Drives Direction:** Use historical trends, channel influence, and donor journeys to guide where and how to invest.

DMAW 11:10 AM – 11:30 AM

Roundtable Discussion #2



Thank You!!



Robert Connelly

Senior Vice President
Integral, LLC



Nosa Adetiba

Director, Nationwide Donor Development
ACLU



Rebecca Sparenberg

Vice President of Digital Marketing
Humane World for Animals

Retention & House File Upgrades



Kylee Lorio

Associate Director of Digital Marketing
Human Rights Watch



John Blackwell

Director, Strategic Analytics Membership
The Nature Conservancy

Why Retention Matters

1. The cost of losing donors vs. keeping them
 - a. Balancing net revenue while easing pressure on acquisition
2. How to read and interpret retention metrics
 - a. Understanding the best KPIs per donor segment



How is Retention Measured?

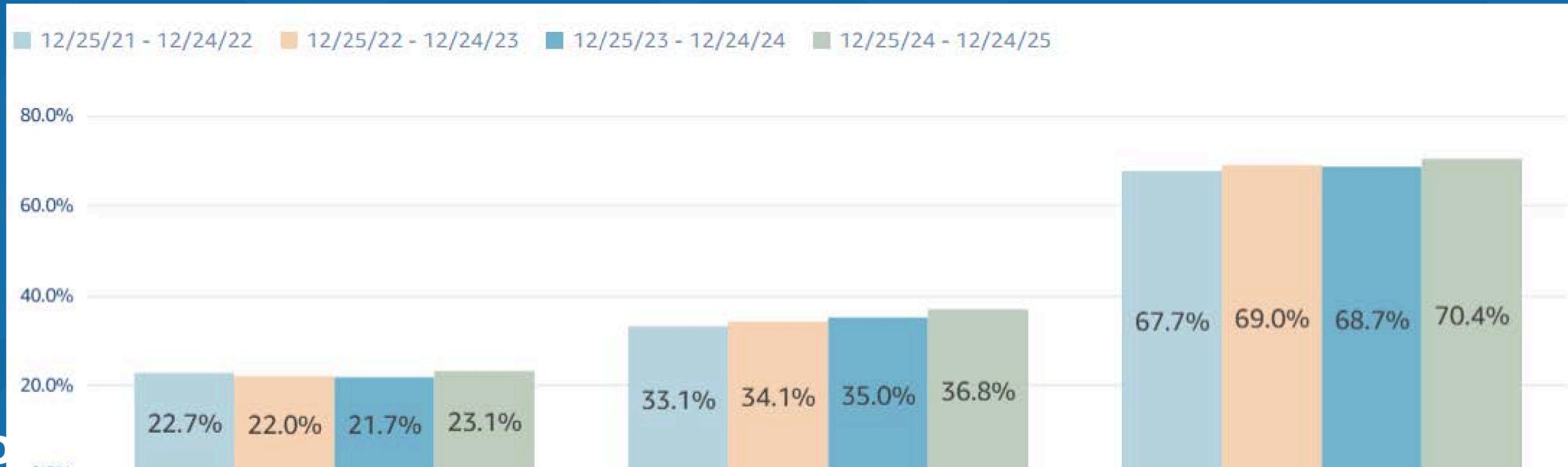
- Retention should be measured **agnostic of donor outreach strategy**
- For annual giving, the most important metric is simple:
- **Of the donors who gave last year, what percentage gave again this year**
- Retention is about **donor behavior**, not campaign structure
- A long renewal cycle (e.g., 18 months) may be appropriate and effective
 - Renewal rate is a useful metric - but **not a substitute for retention**

A healthy annual giving program ultimately depends on **strong donor retention rates**

Understanding Retention Rates

Retention is best understood in the context of a donor's life cycle

Donors who were acquired the previous year retain at the lowest rates with rates increasing each year a donor remains active



Understanding Retention Rates

Life cycles can be further broken down into detail groups

Lifecycle	12/25/22 - 12/24/23	12/25/23 - 12/24/24	12/25/24 - 12/24/25
Reinstated Prior Year	34.1%	35.0%	36.8%
Reinstated from 13-24 Mos Lapsed	43.0%	43.5%	43.5%
Reinstated from 25-36 Mos Lapsed	31.4%	30.4%	32.3%
Reinstated from 37-48 Mos Lapsed	27.3%	28.2%	29.7%
Reinstated from 49-60 Mos Lapsed	28.2%	27.6%	28.4%
Reinstated from 60 Mos+ Lapsed	25.5%	25.7%	29.8%
Consecutive Givers	69.0%	68.7%	70.4%
Consecutive 2 Years	49.8%	48.1%	51.7%
Consecutive 3 Years	63.2%	63.0%	63.3%
Consecutive 4 Years	70.9%	70.9%	71.2%
Consecutive 5+ Years	84.0%	83.5%	83.5%

How Should Upgrades be Measured?

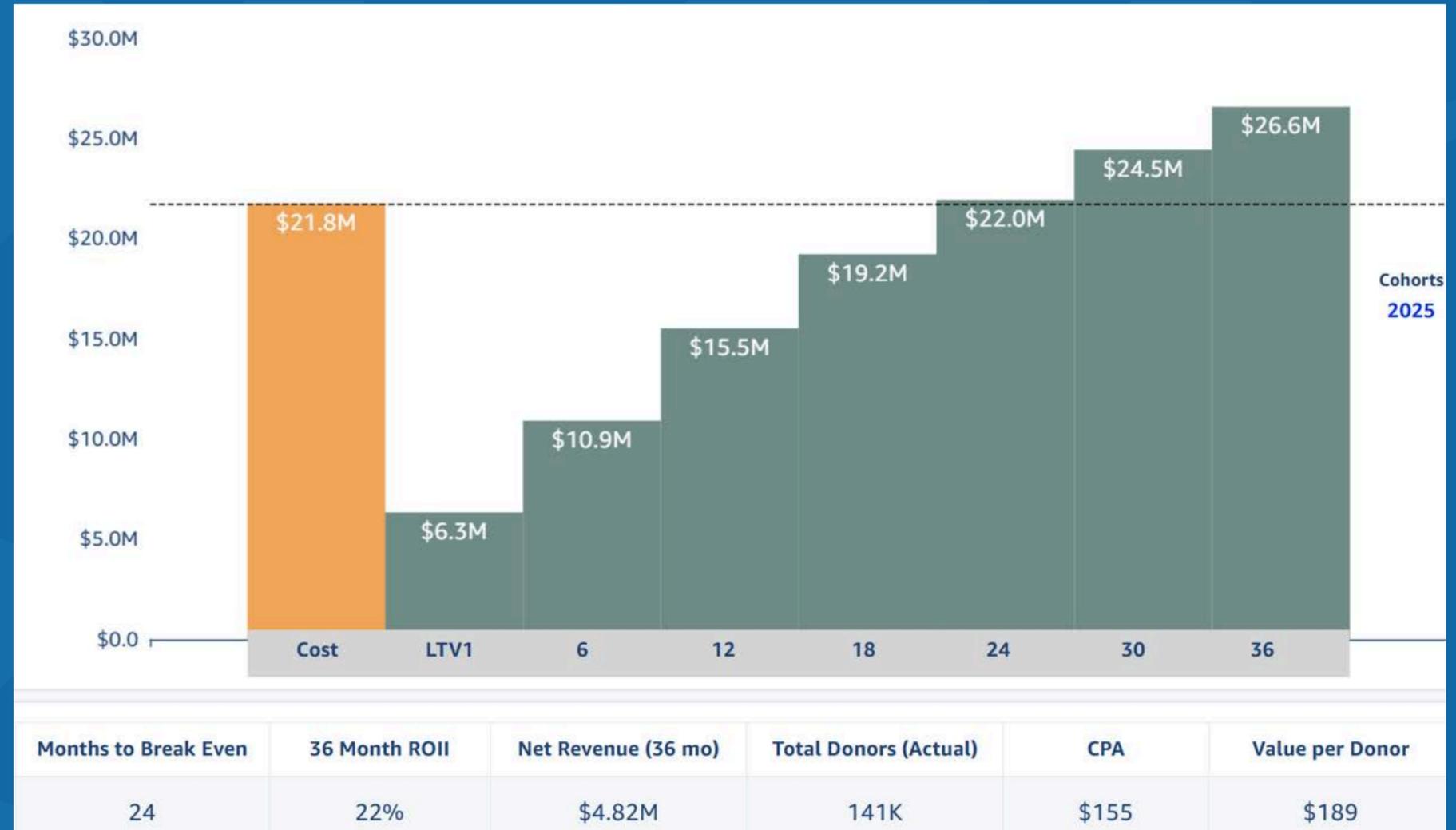
- There are many ways to analyze donor upgrades
- The core question is simple:

Did the donor give more this year than last year?

- Tracking movement into specific giving levels can be helpful but it is not foundational
- When the annual upgrade rate improves, all other meaningful upgrade metrics tend to improve as well
- A strong annual giving program is built on consistent donor upgrades over time
- Upgrades have always been important but with the rising cost of acquisition they have become a critical source of growth for most organizations

What is LTV?

LTV (Lifetime Value) reflects the amount of money we can anticipate a donor giving to an organization over the course of their lifetime.



Who Should Receive Retention Strategies?

All your segments should receive personalized retention strategies!

There are pre-lapsing and post-lapsing retention strategies.

DONATE \$50 -> BECOMES \$350

DONATE \$100 -> BECOMES \$700

DONATE \$250 -> BECOMES \$1,750

DONATE \$500 -> BECOMES \$3,500

7X ANOTHER AMOUNT >>>

Name: Brandon - This is the name we have on record associated with your email address.

2025 9x-Matched Year-End Gift: **MISSING** - according to our records, you have not yet made a donation to our \$250,000 end-of-year fundraising goal

Deadline: Midnight tonight –our 9X matching gift offer expires at midnight. Please make your gift now to ensure it is eligible to be matched.

MATCH MY GIFT 9X

**It may take our system a few hours to process your response.*

Pre-Lapsing Retention Strategies

These are strategies to implement BEFORE your donors drop off.



Premiums

Offer an exclusive premium to sustainers during key drop off windows to encourage retention.



Credit Card Expiration Emails

42% CTR!

3 emails, starting 30 days prior to the credit card lapsing

Cultivation Content

Researcher Journeys / Thank Our Researchers

You've been selected!
We want to hear from YOU:

What issues matter most to you?

TAKE THE SURVEY



HUMAN RIGHTS WATCH

HUMAN RIGHTS WATCH

?

Test your human rights knowledge!

↓

TAKE THE QUIZ



Human Rights Watch is powered by people like you.

Thank you for your support in 2025.



WE ALL BLED THE SAME COLOR

MIS Padres

BORN FROM DREAMS That crossed borders AQUI Estamos!

HUMAN RIGHTS WATCH

Personalized Content

Name: Brandon - This is the name we have on record associated with your email address.

2025 9x-Matched Year-End Gift: **MISSING** - according to our records, you have not yet made a donation to our \$250,000 end-of-year fundraising goal

Deadline: Midnight tonight –our 9X matching gift offer expires at midnight. **Please make your gift now to ensure it is eligible to be matched.**

MATCH MY GIFT 9X

**It may take our system a few hours to process your response.*

Post-Lapse Retention Strategies

Post-lapse does not always mean after a donor has completely fallen off your file.

It can also apply to hitting your website, but not completing a donation.

Abandoned Cart Emails

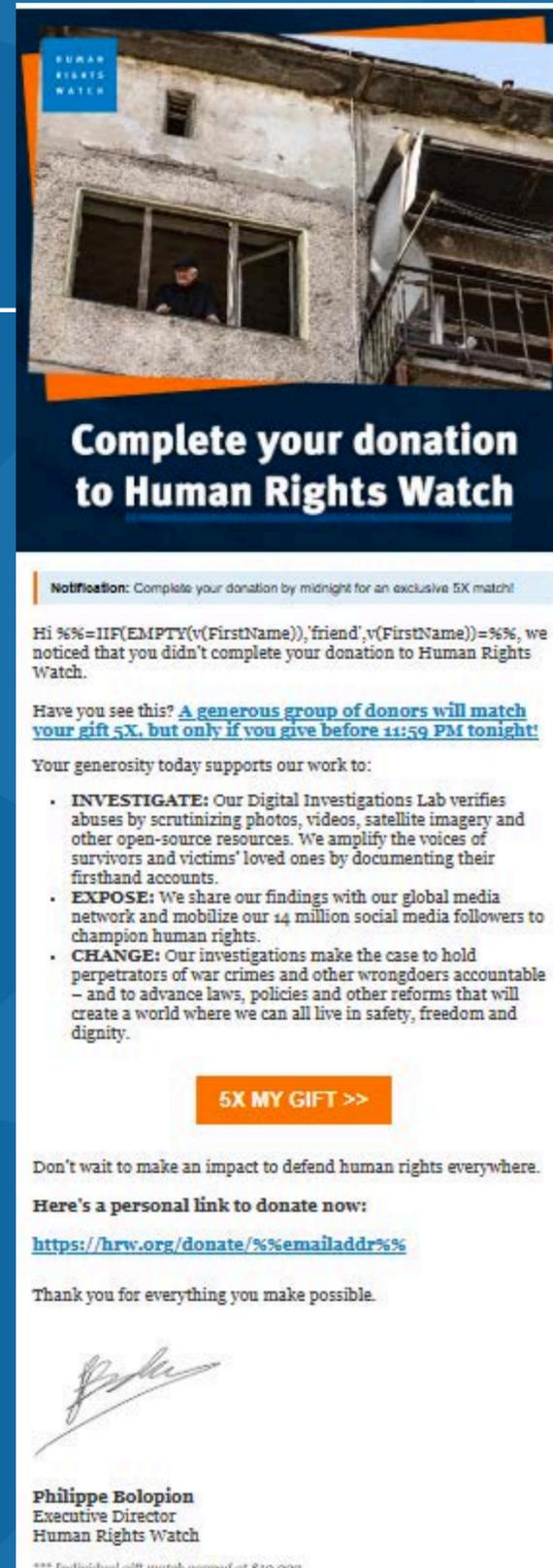
Offer an exclusive match

\$3,000 in additional

revenue/yr

7.28% CTR in December

DMAW



HUMAN RIGHTS WATCH

Complete your donation to Human Rights Watch

Notification: Complete your donation by midnight for an exclusive 5X match!

Hi %%=IIF(EMPTY(v(FirstName)), 'friend', v(FirstName))=%%, we noticed that you didn't complete your donation to Human Rights Watch.

Have you see this? [A generous group of donors will match your gift 5X, but only if you give before 11:59 PM tonight!](#)

Your generosity today supports our work to:

- **INVESTIGATE:** Our Digital Investigations Lab verifies abuses by scrutinizing photos, videos, satellite imagery and other open-source resources. We amplify the voices of survivors and victims' loved ones by documenting their firsthand accounts.
- **EXPOSE:** We share our findings with our global media network and mobilize our 14 million social media followers to champion human rights.
- **CHANGE:** Our investigations make the case to hold perpetrators of war crimes and other wrongdoers accountable – and to advance laws, policies and other reforms that will create a world where we can all live in safety, freedom and dignity.

5X MY GIFT >>

Don't wait to make an impact to defend human rights everywhere.

Here's a personal link to donate now:

<https://hrw.org/donate/%%emailaddr%%>

Thank you for everything you make possible.



Philippe Bolopion
Executive Director
Human Rights Watch

*** Individual gift match capped at \$10,000

Ads Retargeting

Place a pixel on your website or donation form and retarget everyone that lands on that page.

Upgrading Strategies

- No ask strategy is ever fully optimized - across donation forms, mail, or telemarketing
- Most organizations know their approach can be improved
- Yet truly clear wins from ask-optimization tests are uncommon
- Small tactical changes tend to drive incremental results
- This makes strategy more important than perfecting any single ask
- Segmentation matters everywhere, but nowhere more than in upgrade strategy



Sustainer First Approach

SELECT DONATION TYPE



MONTHLY GIFT

ONE TIME GIFT



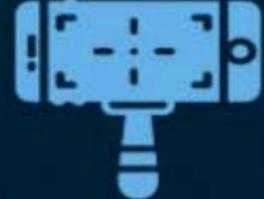
A monthly gift helps us respond to urgent human rights abuses and plan ahead.

Symbolic Giving



\$15

Covers the cost of satellite telephone service for a researcher investigating and exposing human rights abuses in the field.



\$50

Covers the cost of 2 recorder kits that allow our researchers to record interviews with victims, helping with accurate reporting and research on the ground.



\$100

Funds the publication of an advocacy report that exposes the truth and creates awareness of key human rights issues.



\$200

Covers the cost of first aid trauma kits, which provide researchers with tools needed when on mission in under-resourced communities.

Impact Receipts & Lightbox Upsells

- Receipt acknowledging tangible impact, followed by an ask to increase their monthly gift
- Lightbox upsell after the completion of a gift, prompting an increased 1x gift or a recurring gift

DMAW 12:10 PM – 12:30 PM

Roundtable Discussion #3



DMAW

Lunch w/ Faculty

12:30 PM – 1:30 PM



Sustainers: Advanced Strategies for Growth



Rebecca Sparenberg

Senior Vice President
Integral, LLC



Kylee Lorio

Associate Director of Digital Marketing
Human Rights Watch



Nosa Abetiba

Director, Nationwide Donor Development
ACLU



John Blackwell

Director, Strategic Analytics Membership
The Nature Conservancy

Sustainer Basics

- **What is a sustainer?**
 - Frequency (monthly, annually, quarterly, etc.)
- **Why recurring donors matter**
 - Benefits to organization
 - Benefits to donor
- **"Sustainer First" mindset**

What is A Sustainer?



A donor who makes recurring gifts to your cause or organization.



MONTHLY



ANNUALLY



QUARTERLY

What is A Sustainer?

So...What exactly does it mean to be sustainer first?



Benefits of a Sustainer First Program

What do you think are some of the benefits of a Sustainer First program?

Benefits of a Sustainer First Program

What do you think are some of the benefits of a Sustainer First program?

1. Retention – it's easy!
2. Lifetime Value – it's easy!
3. Dependable Revenue – it's easy!
4. Cost-Efficient – it's easy!
5. Anything else?



Growing Sustainers

- **Sustainer acquisition/conversion methods**
 - Email, telemarketing, digital, SMS, Face-to-Face, CTV, DRTV
 - Give example of multichannel sustainer invitation campaigns
 - Sustainer modeling/tagging
- **Upgrade efforts and techniques**
- **Premium Use in Acquisition & Recapture**
 - Exclusive & Timely Premiums
 - (Reactivation w/Window Cling)
 - Balance between Premium vs. Non-Premiums
- **Sustainer Maintenance/Recapture Tactics**
- **Retention and cultivation touchpoints that build affinity and increase lifetime value**

Sustainer Acquisition

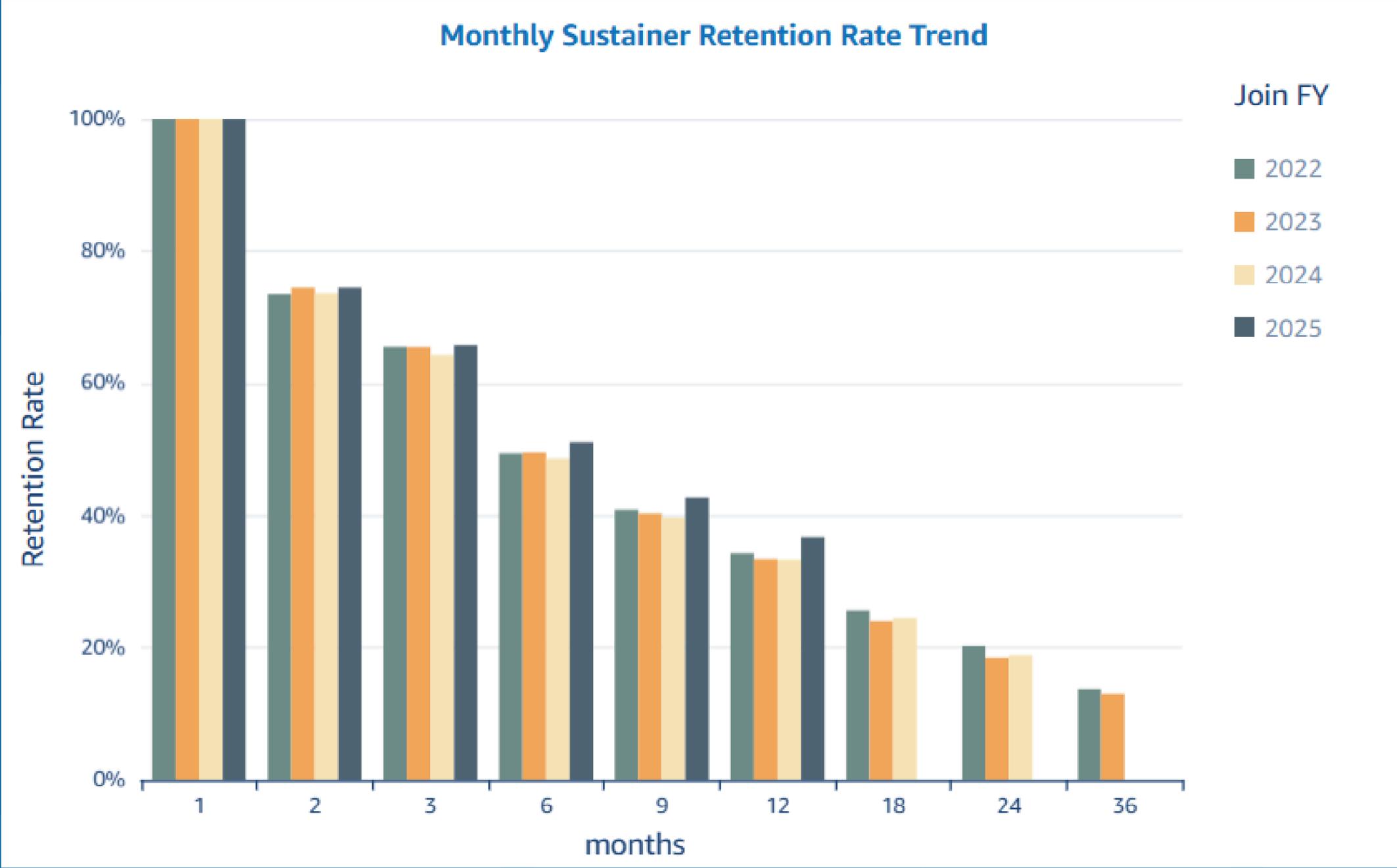
- Direct Mail
- Telephone
- Texting
- Email
- Social Media
- Digital Advertising
- Face to Face/Door to Door
- Organically through one or a combination of the above



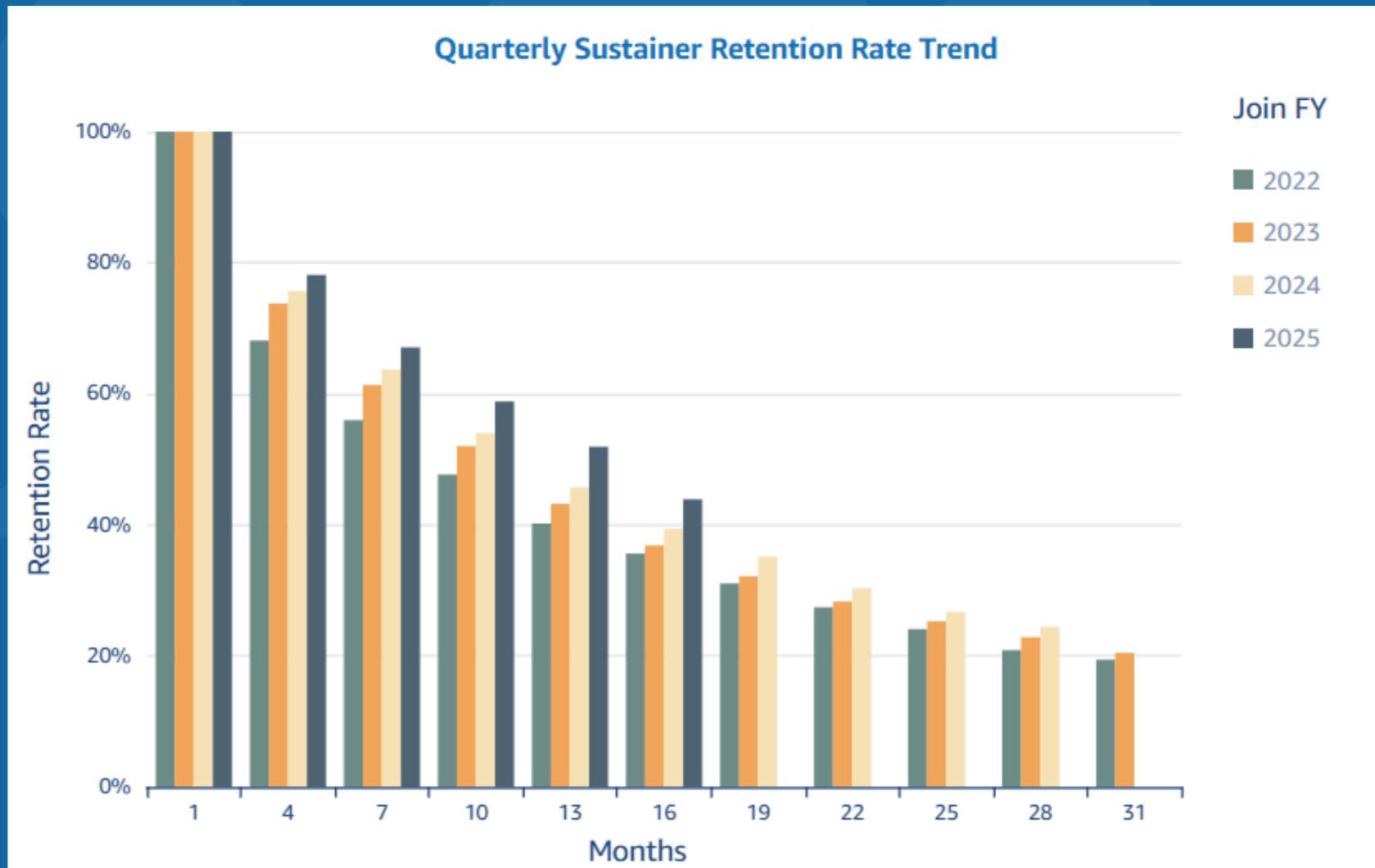
Why Effectively Tracking Sustaining Donor Metrics Matters?

- Acquiring new sustainers or converting existing donors can be expensive, but often worth the investment
- Because costs are high, performance tracking is essential
- Metrics allow you to justify continued investment OR pivot when returns don't materialize
- Spending ~\$300 to acquire a sustainer can make sense if payback occurs within ~22 months
- Sustaining programs require upfront time and investment, but can become the most dependable source of net revenue
- When budgets tighten, sustaining programs are often cut first when in many cases, they should be cut last

Tracking Sustainer Activation - Monthly Donor Rates

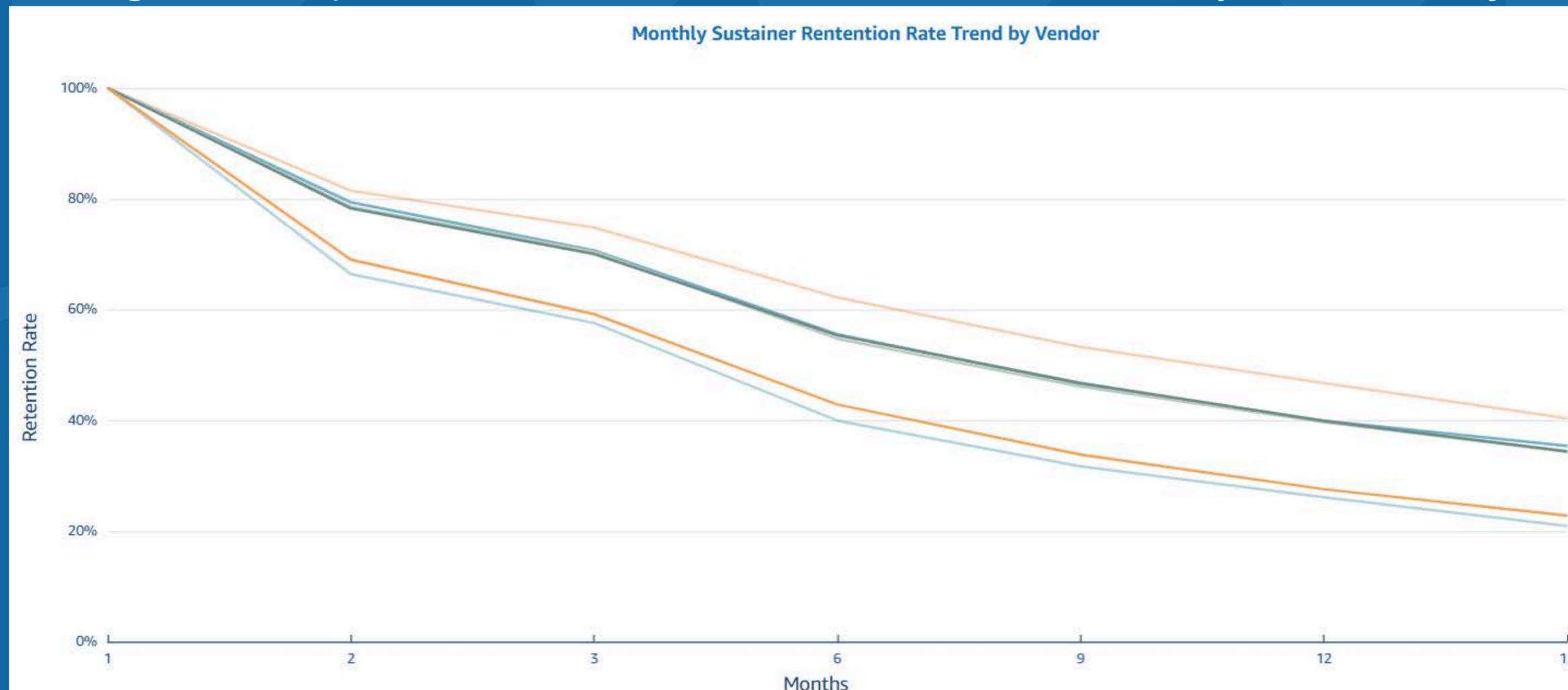


Tracking Sustainer Activation - Quarterly sustainers typically remain active longer



Optimizing Performance

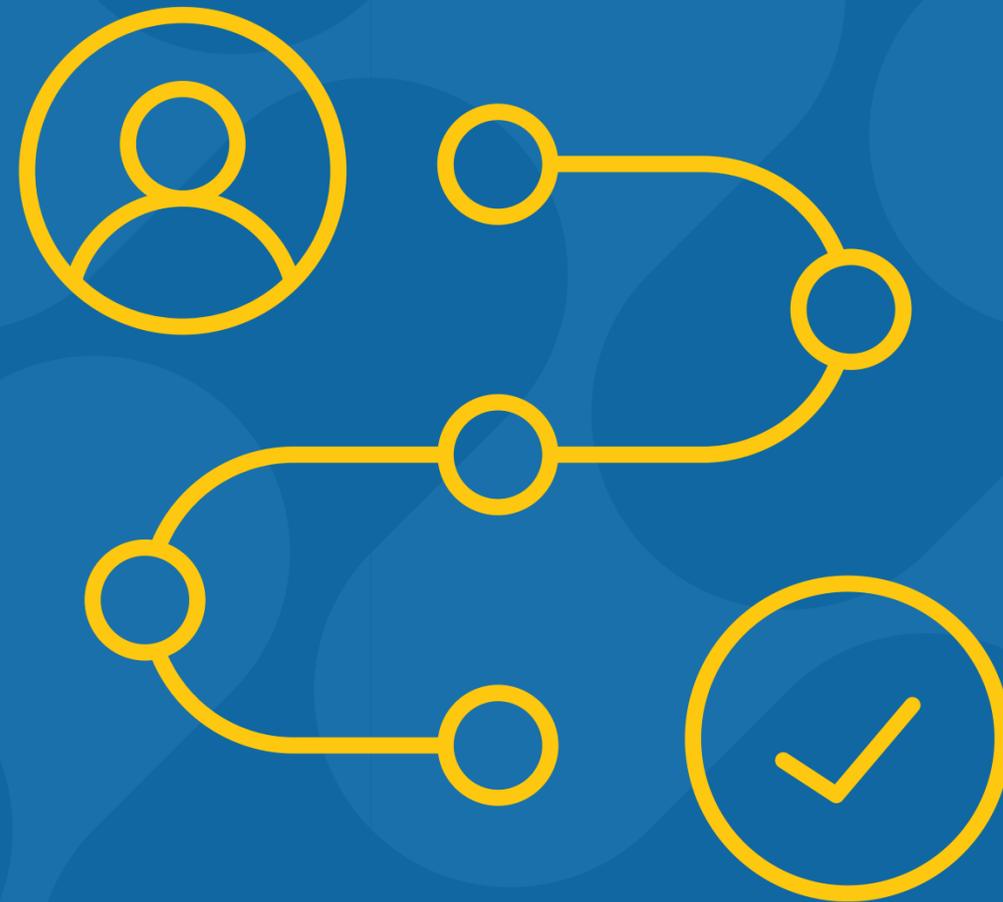
- Channel and vendor performance can vary dramatically in cost and value
- Focusing only on volume can mask underperforming investments
- Optimizing the mix improves payback, retention, and long-term value
- Sustainable growth depends on where sustainers come from - not just how many



Always Be Upgrading...

Things To Consider:

- Relevant asks
- Premiums & incentives
- Matches
- Their journey so far...



Recapture: Don't Leave Money on the Table

Soft Recapture

Automated payment
retry and credit card
updater services



Hard Recapture

- Email & Direct Mail
- Phone Calls & SMS
- Retargeting Ads



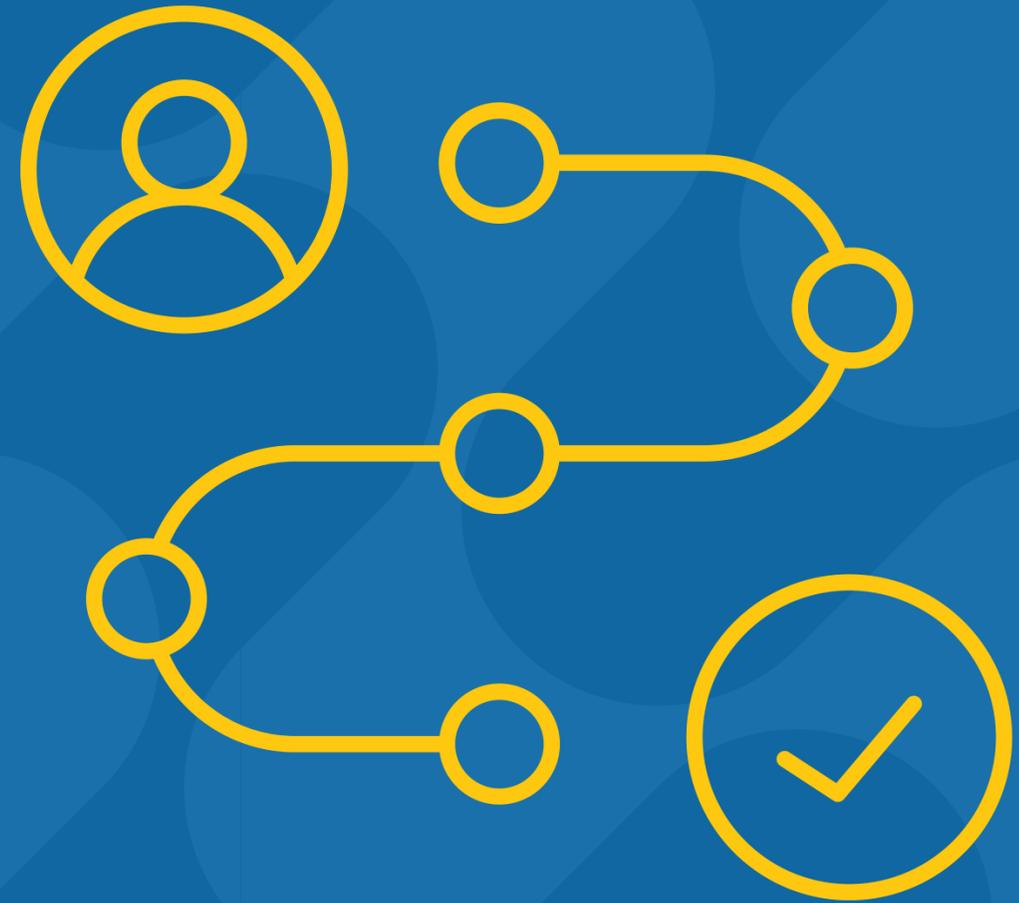
A Word on Retention...CULTIVATION

- Build affinity!
- How? Thank you cards, member cards, anniversary gifts, texts, calls and emails



New Technology & Channels

- DAF Sustainers & Tracking
- Propeller
- Is Meta still working?
- Any other new tech for sustainer acq?



DMAW

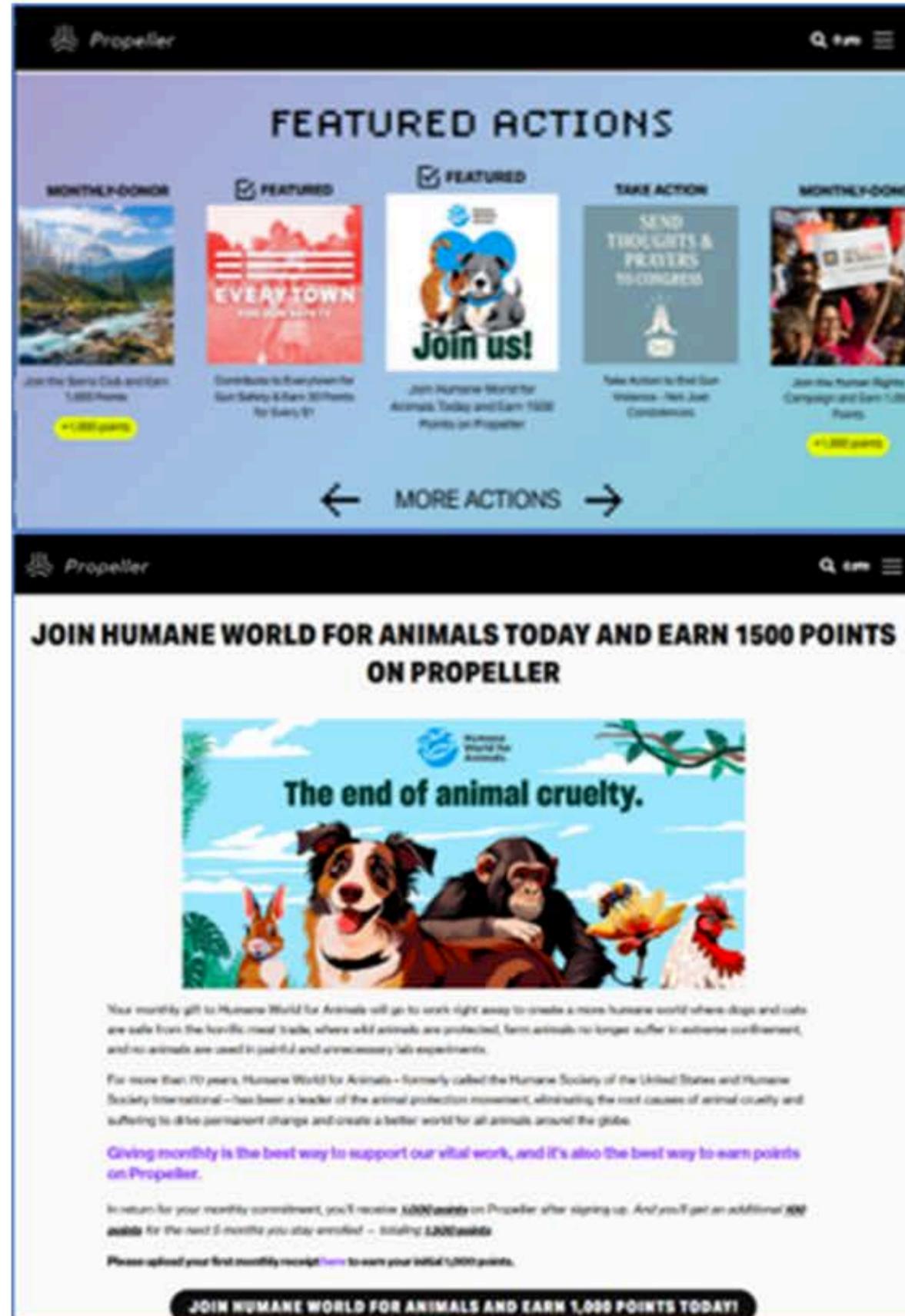
Mini Case Study - Sustainers



Test & Scale

Don't be afraid to try new platforms.

- **About:** Platform works by incentivizing their users to take actions in exchange for points. We expect lower average gift and retention than typical sustainer, but CPA is 1/3 our typical cost.
- **Pilot:** flat CPA of \$75 for Propeller to recruit 333 sustainers for a fixed cost of \$25,000.
- **Expectation:** Recoup roughly \$13,547 by EOY (54% over the first four months). Assumes a \$12 average gift (based on HRC data) and retention similar to F2F.



Select monthly gift amount

\$20

\$30

\$40

\$50

\$100

\$ Other

- Send a Humane World for Animals Window Cling.



Window Cling Premium Sustainer Reactivation Effort

- The Lapsed Monthly Donor renewal appeal offered a free "Pets Inside" window cling as a thank-you for restarting a monthly gift.
- The email achieved a 29% open rate and a 0.79% CTOR, which is strong for donors who have been lapsed.
- It brought in 95 reactivated monthly donors and \$2,298 in reactivated sustainer revenue, with a 0.09% conversion rate. The 0.09% conversion rate is slightly above national fundraising benchmarks.
- A Premium T-Shirt offer will be sent to any lapsed sustainers who did not initially respond.

DMAW 2:00 PM – 2:15 PM

Roundtable Discussion #4



Thank You!!



Rebecca Sparenberg

Senior Vice President
Integral, LLC



Kylee Lorio

Associate Director of Digital Marketing
Human Rights Watch



Nosa Abetiba

Director, Nationwide Donor Development
ACLU



John Blackwell

Director, Strategic Analytics Membership
The Nature Conservancy

Co-Ops & Matchbacks: Refining Donor Targeting with Data-Drive Strategies



Robert Connelly

Senior Vice President
Integral, LLC

Co-Ops: What They Are & Why They Matter

- What is a Co-Op?
- What are Co-Ops used for?
- Why nonprofits use them for acquisition
- Pros & Cons of Co-Op use

What is a Co-Op?

“Collaborative databases where nonprofits share donor info to improve targeting for acquisition (often Direct Mail or digital).”



Why Co-Ops Matter

Fundraising co-ops give you access to smarter, more scalable acquisition by tapping into collective donor intelligence.

- Access to high-propensity donors beyond your own file
- Pre-qualified audiences based on giving behavior
- Scalable source for cold acquisition

When used strategically, co-ops help expand your reach, improve targeting, and inform broader acquisition decisions—making them a valuable asset in a modern fundraising mix.

Key Considerations

While co-ops offer strong potential, their success depends on how thoughtfully you approach list selection, volume, and overlap.

- Not all co-ops are equal—match quality varies
- Requires volume to test effectively
- Be mindful of overlap across co-ops and your own list

Treat co-ops as a strategic input, not a plug-and-play solution—ongoing analysis and refinement are key to unlocking their value.



Strategic Guidance



Use Co-ops When:

- You need cold audience scale but want more precision than list rentals
- You're optimizing Direct Mail and want to lift response rates

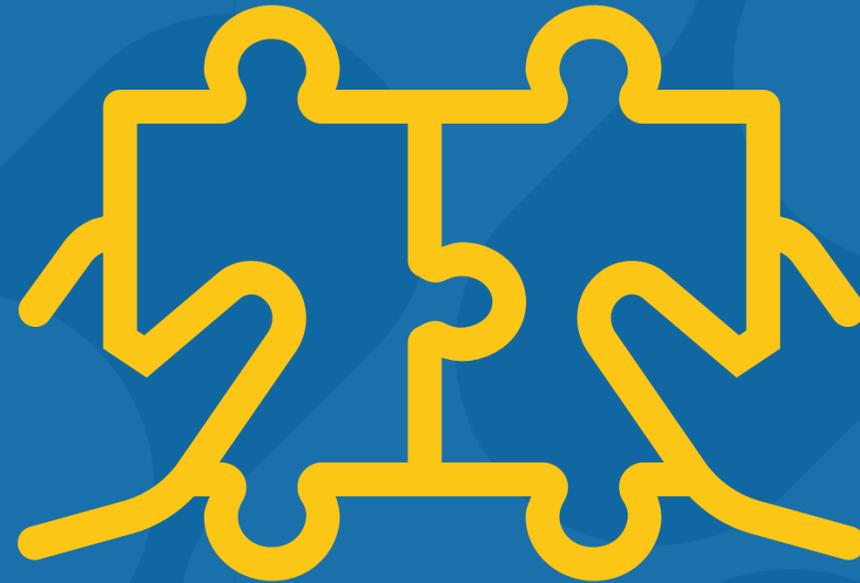


Monitor For:

- Net new donors vs. overlap with other sources
- Performance by co-op and list selects
- Long-term value—not just initial response

Matchbacks Explained

- Matching gifts back to original campaigns
- Why matchbacks are crucial for measuring real ROI
- The “new” attribution – direct mail response isn’t just about reply devices any more



What is a Matchback

A matchback is the process of linking a donor's gift back to the **original campaign that prompted it** — regardless of how the gift was ultimately made (e.g., online, by phone, by mail).



Revealing the True ROI

Many gifts are credited to **general channels** (e.g., online) but were prompted by other efforts like Direct Mail or Telemarketing.

Without matchbacks, high-performing campaigns can appear underperforming—and vice versa.



Reflect Real Donor Behavior

Donors **increasingly** respond in different channels than they were solicited in (e.g., getting a mail piece, then giving online).

Matchbacks account for cross-channel conversion, offering a more complete performance picture.



Inform Future Strategy

Insights from matchbacks can inform creative, targeting, and channel prioritization.

Turns short-term campaign data into long-term strategic value.



DMAW 2:45 PM – 3:00 PM

Roundtable Discussion #5



Thank You!!



Robert Connelly
Senior Vice President
Integral, LLC

DMΔW

Refresh & Networking w/ Faculty

3:00 PM – 3:15 PM



AI in Fundraising



Bryan Casler

Vice President, Digital Strategy 4Site Studios



Fernando Santos

Director, Development & AI Solutions
4Site Studios

Three Ways AI is Showing Up

AI is no longer just a tool, it's a teammate:

- Inside your current software
- Off-the-shelf tools
- Custom-built solutions



AI Inside Your Current Software

The lowest-risk AI wins are already hiding in your tech stack:

- Gmail / Inbox tools - Configurable summaries of email threads, newsletters, and news
- Google Sheets - AI functions to generate custom formulas from plain language
- AI in the browser - Aggregate and synthesize data across multiple open tabs

Where Are You Already Paying the “Manual Tax”?

- What recurring fundraising work feels predictable, time-consuming, and low-value?
- Where does human effort add the least strategic differentiation?

NPS Example:

- A National Park Service ranger who, in 45 minutes, used natural language to build an AI tool that automated tedious paperwork. This single tool is estimated to save the service 7,000 days of human labor a year ([ref](#)).

Off-the-Shelf AI Tools

What's different now:

- Agentic workflows (multiple AI tasks running in parallel)
- AI as collaborator, not just responder
- Rapid experimentation at low cost

Examples:

- AdvocacyAI, Claude (Chat / Vibe Coding), Manus - Deep Research (Bought by Facebook), Miro/Notion
- Multi-variant message testing, Persona-specific copy generation, Engagement simulations, Digital engagement officers / conversational AI

What Would You Test If It Were 10× Easier?

- What donor messages, offers, or engagement ideas never get tested due to time or cost?
- What hypotheses are stuck in someone's head instead of being validated?

Custom-Built AI Solutions

When custom makes sense:

- Core operational bottlenecks
- Data sensitivity & governance concerns
- Differentiated supporter experience
- Long-term cost control

Examples:

- Automated reconciliation agent, Internal reporting copilots, Organization-specific engagement models, Voice-aligned advocacy or Fundraising AI - Your custom systems can improve as models improve
- n8n - Automation Workflow

Where Would Owning the System Matter Most?

Dolor sit amet consectetur adipiscing elit:

- What fundraising function would you not want dependent on a vendor roadmap?
- Where does control, privacy, or customization create real strategic advantage?

Practical Takeaways You Can Act on This Quarter

Dolor sit amet consectetur adipiscing elit:

- Identify one reconciliation or reporting workflow to automate
- Create a standing testing audience for messaging & offers
- Assign an internal owner for AI experimentation (not IT-only)
- Engage vendors with clearer AI requirements
- Budget for AI as capability, not tooling

DMAW 3:45 PM – 4:00 PM

Roundtable Discussion #6



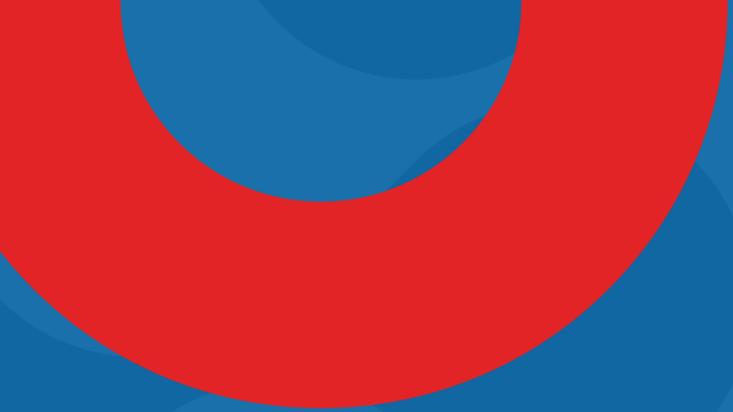
Thank You!



Bryan Casler
Vice President, Digital Strategy
4SiteStudios



Fernando Santos
Director, Development & AI Solutions
4Site Studios



DMΔW

Closing
Panel/Q&A/Final
Remarks





Thank You to
Our Sponsors!





Thank
You!

4250 N. Fairfax Dr., Suite 600
Arlington, VA 22203

(703) 689-3629

info@dmaw.org

www.dmaw.org