

Be Unique. Be Creative. Be Rewarded.

By Daniel Brown



What do a wounded veteran, an endangered tiger, a woman battling cancer, a neglected puppy and a Syrian refugee all have in common? Chances are you've been asked to "give them hope" (Figure 1).

The competition for donor dollars is fierce, and you have to say

something unique or you'll be camouflaged, blending in with the rest of the pack. So many fundraisers turn to what they think makes the cash register ring, but the real answer to sustained fundraising success is in your brand. As a nonprofit, what you're selling is a belief in your organization and a belief that you'll do something great with a donor's money. That belief can only be cemented through branding. Start there.

I'm not suggesting you chuck everything you learned about direct marketing and systematic testing; I'm imploring you to begin practicing actionable branding. Yes, that phrase is a delicious morsel of buzz word puffed pastry,

but it's also an essential strategy. Building brand and driving action are not mutually exclusive tasks and if you bring both disciplines together, you will accelerate fundraising, attract younger audiences and bridge the divide of your creative across channels.

Here's an exercise to determine if your advertising creative is struggling to achieve actionable branding:

Continued on page 12



FIGURE 1

“

I'm imploring you to begin practicing actionable branding. Yes, that phrase is a delicious morsel of buzz word puffed pastry, but it's also an essential strategy. Building brand and driving action are not mutually exclusive tasks and if you bring both disciplines together, you will accelerate fundraising, attract younger audiences and bridge the divide of your creative across channels.

”

In This Issue: The Best of Bridge

FEATURES

Be Unique. Be Creative. Be Rewarded.	1
The Evolution of the DAF	1

COLUMNS

Greater Engagement	5
Direct Marketing Data Analytics	6
Out of the Trenches	9
DMAW/EF	14

DEPARTMENTS

President's Perspective	2
DMAW Calendar	3
Quick Takes	4
News Notes	13
Member Spotlight	15

The Evolution of the Donor-Advised Fund

By Jack Doyle



There's a lot of attention on how much money is going into donor-advised fund accounts. Our take on donor-advised fund giving is from watching donor behavior.

In short, twice as much money is going into these accounts each year than is being granted out; the naysayers to this charitable giving option are expressing anger at the charitable sponsors tasked with managing these funds to grow. This might be a good time for all of us to consider looking into a mirror than out the window.

Funds are distributed to charities when the **donor** (the advisor) makes a grant request. Donors are inspired to give when asked. The more you ask, the more times they will consider it. So ask yourself how effectively (and often) are you

suggesting to all of your donor-advised fund donors that they use their giving account on your behalf?

BACKGROUND

The major charitable sponsors (Fidelity, Schwab and Vanguard) have been around for decades. The majority of their donors used the giving accounts to make annual gifts to the institutions of higher learning...undergraduate and graduate schools. Some of these schools—Harvard, Princeton, Penn and Stanford—are among the top 20 charities for grant dollars sent out by Vanguard Charitable.

In 2015, we started to observe an uptick in gifts to our clients from these funds. It was a donor-driven phenomenon. Donors just starting using their giving accounts for regular charitable

Continued on page 8

President's Perspective

The Best of Bridge!

By Mikaela King



The Bridge conference is an event I think about all year. The conference is always a whirlwind of events, decisions on what sessions to go to, networking in what feels often-times like a happy family reunion, learning about the latest solutions providers and, of course, absorbing as much as I can in a two-day festival of fundraising education.

After it's over, I have notes and ideas enough to last months of testing—many of which return results that justify the cost of Bridge for myself and my staff. With 17 tracks, over 88 breakout educational sessions, four pre-con-

ference workshops, an Art and Science Lab and four amazing general session speakers, I also think about all the interesting sessions I didn't get to attend—and we've heard from many of you who feel the same way.

So this year, we're adding a number of member benefits and other perks that give you more access to Bridge content that you might have missed. This issue is dedicated the "Best of Bridge," and we added two "Best of Bridge Lunch and Learn" events this fall. Additionally, we'll be launching a podcast to roll out more great Bridge content in the coming months, so stay tuned!

One major takeaway I had from Bridge this year was that Artificial Intelligence (AI) is not just coming, it's already here. Companies like Amazon, Apple and Google, whose reach and adoption rate mean they often set consumer expectations for the rest of us (for-profit and nonprofit alike), are already using this technology to augment the consumer experience. Siri, Apple's AI assistant, along with Google Assistant and many others, have been around for several years, and you can ask them just about anything.

While you may think of these assistants as talk-to-search, the next generation of AI is pretty impressive: Amazon announced earlier this year that consumers could donate to nonprofits through Alexa, broadening existing technology that lets you buy just about anything under the sun by asking Alexa to purchase it for you on Amazon. And AI is what drives curated social media feeds based on your interests and actions. The robots are here, and, as marketers, we need to think about how we can leverage AI for our constituents, our marketing, our products, services and mission delivery. Are you planning the resources and expertise you'll need to help you get there?

The neuroscience of marketing was another hot topic at Bridge. We as marketers often joke that we can predict a test winner because it's the version we don't like, but science and marketing together are learning more about human processing and behavior than ever before. Things like: what emotions are triggered by certain creative approaches, how and what we remember from a campaign, ask array anchoring, and how different approaches work together.

And yet, in this high-tech, fast-paced, often stressful season of year-end planning—elections—Black Friday—Giving Tuesday—year-end production—Thanksgiving—holidays—family—travel—year-end results monitoring, etc.—I hope you're able to slow down and take a moment, amidst all the chaos and deadlines, to marvel at the wonder of our world, flawed and awesome as it is, and to extend a helping hand to someone who needs it. After all, that is the real "bottom line" of this season, isn't it?

Onwards,
Mikaela
miking@ngs.org

DMAW Executive Committee & Board of Directors 2018

Executive Committee

President—Mikaela King,
National Geographic Society
202-807-3197, miking@ngs.org
Vice President/President Elect—Marie Kosanovich,
Lautman Maska Neill & Company, 202-296-9660,
mkosanovich@lautmandc.com
Treasurer—Teresa Weaver, O'Brien Garrett,
202-467-0048, tweaver@obriengarrett.com
Secretary—Melissa Ford, Mal Warwick Donordigital,
202-332-3124, melissa@mwdagency.com
Immediate Past President—Eric Rardin, Care2
703-473-2825, ericr@care2team.com

Board of Directors

Dennis Ashcraft, AMH Print Group
804-286-6166, dashcraft@amhgroup.us
Kate Carr, Silver Marketing
301-951-3505, kcarr@silvermarketing.com
Steven DelVecchio, AARP Foundation
202-434-6223, sdelvecchio@aarp.org
Meg Ferguson, Production Solutions
703-734-4566, mferguson@psmail.com
Roger Hiyama, Wiland
703-403-3403, rhiyama@wiland.com
Denise Hubbard, Names in the News
410-392-0313, denisehubbard@nincal.com
Karin Kirchoff, K2D Strategies
703-812-8260, kkirchoff@k2dstrategies.com
Stacie Mruk, The Nature Conservancy
703-841-3924, smruk@tnc.org
Jamie Natelson, Integrated Direct Marketing, LLC
202-261-6587, jnatelson@idm-dc.com
DeDi Oxenberg, CDR Fundraising Group
301-858-1500, doxenberg@cdrfg.com
Polly Papsadore, PMG
443-539-2603, polly@pmgdirect.net
Alan Rich, Nova Label Co.
301-386-4433, alan@novalabel.com
Rebecca Shapalis, Avalon Consulting Group
202-429-6080, ext. 110, rebeccas@avalonconsulting.net
Karen Somerville, American Nurses Association
202 491-1114, kcfsomerville@gmail.com
Pete Taylor, RWT Production
571-243-1237, ptaylor@rwtproduction.com
Jeff Thomas, ProList
301-924-4545, ext. 1022, jthomas@prolist.com
Laura Zylstra, Habitat for Humanity of Washington
DC, 202-882-4600

DMAW Executive Director

Donna Tschiffely, donna@dmaw.org,
703-689-DMAW, fax 703-481-DMAW

Postmaster: Send address changes to DMAW Marketing
AdVents, 11709 Bowman Green Drive, Reston, VA
20190-3501; email info@dmaw.org • www.dmaw.org

DMAW Marketing AdVents: (ISSN 0896-4742) is
published monthly by the Direct Marketing Association of
Washington, Inc., 11709 Bowman Green Drive, Reston,
VA 20190-3501. Periodicals postage paid at Herndon, VA
and at additional mailing offices.

Calendar of Events

TUESDEC

4

Best of Direct
6pm – 9pm
National Press Club
Washington, DC



Photos: iStock/Getty Images

WEDJAN

16

Webinar
Topic: Messaging Automation
1pm – 2pm

Deadline for registration is 24 hours before the event, space permitting.
Cancellations must be received 48 hours in advance. No-shows will be billed.
Register at dmaw.org or call 703-689-3629.

WEDMAR

6

DM 101
8:30am – 4:30pm
AARP, Washington DC



Photos: iStock/Getty Images

THURJAN

24

DMAW Annual Meeting
6pm – 9pm
SEIU, Washington, DC

WEDFEB

6

MAXI Webinar
Topic: How to Complete
Your Submission
12pm – 1pm

Note: MAXI submissions
are due by Friday
February 22, 2019 COB.

THURMAR

21

Lunch and Learn
Topic: Mid-level giving
12pm – 2pm,
SEIU, Washington, DC

Quick Takes

Every month DMAW asks people in our industry for their 'quick take' on a topic

What did you take away from Bridge that you plan to test/ implement in the next quarter/cycle/year?



One of the most exciting parts of attending Bridge is never being quite sure what sessions you will attend because of so many choices.

This year I found myself at the session on DRTV—or DITV as they are now calling it. I last ran a DRTV campaign almost 18 years ago, so as you might have guessed things have changed.

What I found so exciting about the session was how an old-school marketing tool can be made new (from capital "D" Direct to capital "I" Interactive) by embracing the changes in how people watch TV and interact with advertising. In the same way that face-to-face, the oldest way of getting donations, became the big new thing a few years ago, I think DITV may become a new opportunity for more organizations. While it may not be this year, I know that as soon as I can, I will be running a DITV test for Audubon.

— Steve Abrahamson
VP, Direct Response
National Audubon Society
sabrahamson@audubon.org



My focus at Bridge this year was on the important and difficult challenge of "the handoff," the gray area between direct response and major giving that might fit into a "mid-level" program.

I was interested in different presentations to learn how nonprofits have cracked the code. By observing what their donors said and what they did—paying attention to the data and the story behind it. Back at the office, our team mapped out a plan to manage the donor journey differently for this special constituency during our fall campaigns.

This meant throwing ourselves into the data and taking a fresh look at things. Solving the mystery of middle-donor engagement means having a streamlined operational approach up AND down the pyramid. It's in those very same gray areas where real conversion can happen—Amen!

— Ann Schumacher
Director, Development Services
Washington National Cathedral
aschumacher@cathedral.org



The 2018 Bridge to Integrated Marketing & Fundraising Conference had so much insight and actionable content. So, here's my shot at a variety around mobile trends that I am contemplating and prioritizing (gathered from several sessions). DYK? Mobile took over desktop browsing in 2016—so if you don't have a mobile strategy, you are behind.

But there are a variety of ways to catch up: position mobile as an engagement, retention, emergency appeal, social listening, directional fun or real fundraising channel; use SMS or Messenger for customer service with chat bots and messenger bots; and don't forget YouTube as the leading searching engine for mobile. And for direct marketers, I was reminded to use CTAs always: collecting opt-ins everywhere, adding subscribe buttons or personalizing. There's definitely integration with mobile for all.

— Karen Frazier Somerville
VP and General Manager
American Nurses Association
kcfrazier@gmail.com



The big aha for me was around system integration. Data silos are everywhere. Fundraising with non-integrated systems means that it's much harder to plan and execute a robust multi-channel campaign, but if you aren't a technical person, how do you begin to fix this in your organization?

In order to help fundraising staff bust down those data silos, I'm going to develop new trainings and resources that will map out exactly how fundraising staff can make plans to bring their systems together.

We've all embraced integrating our fundraising campaigns – bringing direct response, digital, and social channels together to put the right message in front of the right people at the right time. Now it's time to do ourselves – and our supporters – a favor and put the right data connections in place.

— Maureen Wallbeoff
Principal
Practical Wisdom for Nonprofit Accidental Techies
meetmaureen.com

GREATER ENGAGEMENT: WORDS OF WISDOM ON EVERYTHING AND ANYTHING THAT DRAWS IN YOUR SUPPORTERS AND DEEPENS RELATIONSHIPS

Do Your Middle Donors Have Middle-Child Syndrome?

By Craig DePole



Most of us remember the episode of the 1970's sitcom, "The Brady Bunch," in which Jan Brady (the middle daughter) famously says "Marcia! Marcia! Marcia!" Jan suffered from the effects of (what some call)

middle-child syndrome, which is defined as feeling excluded, under-appreciated and lost in the shadows of older (or younger) siblings.

Are your middle donors suffering from a version of middle-child syndrome? Middle donors are often caught between the high praise and high expectations applied to major donors and the expense and attention of direct response programs designed to coddle low dollar donors.

The reality is the middle donor segment is usually the workhorse in our fundraising programs. They account for less than 2 percent of all donors in our programs and yet generate upwards of 30 percent or more of annual revenue—all without receiving much attention or fanfare.

Whether you are retooling your established program or building one from scratch, there are seven guidelines to consider to ensure your program is successful:

1. Let it straddle. A middle donor program is a hybrid between your low dollar and major gifts programs. It straddles both worlds. Let it. Don't pigeonhole it into one silo or department.

2. Dedicate a staff person to middle donors. It's worth it. Trust me! This person needs to have the skills to work with various teams, as well as the ability to leverage technology to develop relationships with middle donors.

3. Mind the gap. Much like when boarding the metro, the gaps between giving levels offer the greatest risk. The process for moving a middle donor up into major gifts or a major donor down into the middle donor program is one that should be formalized with clear business rules and intentional hand-offs. To be effective, this process must go beyond database queries and involve individual assessments for each donor being moved.

4. Leverage technology. For middle donor programs, technology is your friend. Use Outlook mail merges, handwriting production

techniques and other tools to replicate the appearance of a personal touch to a broader audience more efficiently.

5. Share impact. Middle donors are passionate about your cause and interested in the work you do. Engage them with additional and more in-depth content, while leveraging cost efficiencies within the existing low-dollar direct response program. The number of donors in a typical middle donor program is often too small to do any reliable, statistically significant testing, so save your efforts

7. And lastly, aim to surprise and delight. Be creative and be flexible in your efforts to steward your donors. Try new ideas and explore different channels of delivery. Take advantage of the many little moments throughout the week, month or year when your mission is being fulfilled and share that experience with your middle donors. They will appreciate the personal touch and become even more engaged.

The analysis shows that when we give more care and attention to our middle donors, they



Photo: iStock/Getty Images

and aim to offer middle donors an inside look and deeper appreciation for the work they help fund.

6. Optimize the donor experience. While bringing in revenue is always the goal, make sure your organization is focused on creating positive donor experiences above all else. Try to see the organization from the donor's perspective. Look beyond one mailing or one interaction and focus on the entire donor journey. Also getting your organization to view revenue from all channels as part of the middle donors' revenue attribution will help reveal the full perspective of the donor's experience.

develop into the loyal, appreciative donors we rely on for planned gifts and major gifts in the years to come.

Craig Depole is the senior VP of Newport ONE. Craig has been raising funds for great causes for more than 20 years. He gets a lot of joy out of bringing together his right brain creativity and his left brain scientific analysis to help nonprofit organizations create a better world. He has raised millions upon millions of dollars and helped foster long term relationships with donors through multichannel, donor-centric, integrated fundraising strategies. He can be reached at cdepole@newportone.com.

Fundraising STATs: Just the Facts on Fundraising Statistics

By Caity Craver



To help answer the frequently asked question, *how are we doing compared to other organizations?* Caity Craver, Ben Miller and Jonathan Benton armed a standing-room-only crowd with the answers at their Bridge Conference session. “Just the Facts on Fundraising Statistics” distilled the key “need-to-know” metrics for direct marketers. With those metrics in hand, participants could assess both their own performance and compare it to the sector as a whole. The session’s stats were generated from two of the most important data assets available free to nonprofits.

DATA ASSET A: THE FUNDRAISING EFFECTIVENESS PROJECT

Through the all-volunteer effort of donor software firms and analysts, The Growth in Giving Initiative’s Fundraising Effectiveness Project (FEP) has created the largest database of donations that has ever been compiled. This anonymous dataset comprises data from more than 17,000 organizations. The FEP reports on fundraising performance quarterly and annually. Among the software firms involved were

Bloomerang, ClearView, DonorPerfect, Blackbaud’s eTapestry and NeonOne. It’s an all-volunteer effort, and, in addition to the CRM companies were the Association of Fundraising Professionals, the Urban Institute, the Philanthropic Services for Institutions, DataLake, Concordia University New York, The Do Good Institute and DonorTrends—all chipping in to make this monumental project a reality.

DATA ASSET B: THE M+R BENCHMARKS STUDY

This benchmark designed and produced by M+R Strategic Services is the only one of its kind, focusing exclusively on online transactions from nonprofit donors. It contains an extensive array of data points from 154 nonprofit participants. The benchmark covers each single digital interaction with a supporter: an email opened, a donation made, a petition signed, a website visited, an ad clicked, a Facebook post liked or a tweet retweeted. All told, these add up to 4,699,299,330 email messages, 527,754,635 web visits and 11,958,385 donations. The top take-aways for 2017 were as follows. Overall Fundraising Trends (from the Fundraising Effectiveness Project):

- Donor retention has been less than 50

percent for more than a decade.

- Decline in retention signals problems ahead.
- High-dollar donors are increasing in value. Mid-level and major donors are increasingly more important to organizations.
- New donors account for more than 40 percent of an active file.
- Online Fundraising (from the M+R 2018 Benchmarks Study):
 - Overall online revenue increased by 23 percent in 2017, accelerating from 15 percent growth the previous year.
 - Revenue from one-time gifts increased by 19 percent, while monthly giving revenue increased by 40 percent.
 - Monthly giving accounted for 14 percent of all online revenue in 2016, and 16 percent of online revenue in 2017.
 - Email messaging drove 28 percent of all online revenue in 2017.
 - Nonprofits received \$42 for every 1,000 fundraising emails sent.

WHERE ARE WE NOW?

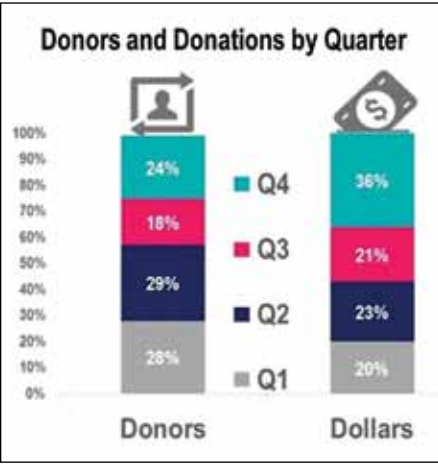
By the end of 2017, the industry seemed to be making a comeback from the earlier recession years. Thus, we rang in 2018 with a sense of optimism that this would be the year donor retention and revenue would rebound.

But...when the FEP first quarter report was released, our optimism dwindled. Donor Retention was down. Revenue was down. Things were looking not looking good. However...there was a silver lining—the under \$250 donors had an increase of 3.7 percent as compared to the same period last year. This was the only segment that had positive change. Perhaps we were overly optimistic at the end of 2017. Some say results exceeded expectations because of newly passed tax reform laws, others think it could be related to the disaster response from 2017 Hurricanes Harvey, Irma and Maria. Results from Q2 2018 are concerning.

- Donors are down -6.6 percent from -6.2 percent in Q1.
- Revenue continues to be down (silver lining: \$1,000+ donors did close the gap a little).

WILL WE CATCH UP?

Take a look at the figure below. This graph depicts the amount of revenue that is generated in each quarter. Not surprisingly, the majority of donations are generated in Q4. This means we can expect to see slow progress between now and the end of October. However, the second quarter gen-



erates the majority of donors—averaging 29 percent. Consequently, the next month looms large for many organizations.

WHAT CAN WE DO ABOUT IT?

- Make sure your software [CRM] provider is contributing their anonymous data to the Fundraising Effectiveness Project.
- Participate in the M+R Benchmarks Survey
 - Know your numbers
 - Have you retained more donors in Q2 than you did last year?
 - Has revenue increased or decreased?
 - Once you have your retention and revenue numbers you can evaluate:



RECOMMENDED ACTION STEP: Set strategies according to where you are on the chart above.

- How do you compare against yourself?
- How do you compare against the sector?

The quadrants above represent these comparisons. Are you a challenger, leader, Climber or troubled? For example, if you are a “leader,” strike while the iron is hot. Things may not always be this good, so make sure you capi-

talize on your successes. If you are a “challenger,” you have been making some improvements, which is a step in the right direction, but you must identify those areas where you still are lagging behind and focus your efforts there. For the “climbers,” you need to determine if last year was just a blip or if there are larger issues underlining your results. Finally, the “troubled” organizations need to seek immediate help. The red flags are up, and it is time to make some serious changes in your fundraising program.

Visit FundraisingStats.com to stay on top of all the latest industry trends, all compiled on one site. Looking for more Stats? See you July 10 through 12 at #Bridge19. Caity Craver is CEO of DonorTrends. She can be reached at Caity.Craver@DonorTrends.com or 866.948.9363 ext. 108.



Photo: iStock/Getty Images

HOW TO HACK THE BRAINS OF DONORS, MEMBERS AND OTHER HUMANS

PRESENTED BY NANCY HARHUT, CCO, HBT MARKETING

DMAW ANNUAL BUSINESS MEETING, KEYNOTE & NETWORKING RECEPTION

THURSDAY, JANUARY 24
6-9PM | SEIU | WASHINGTON, DC

DMAW
Direct Marketing Association of Washington

Evolution of the Donor-Advised Fund
Continued from page 1

giving and in response to natural disasters. On the receiving end, it produced a mixed reaction of excitement for the increasing funds, but an uncertainty for what to do. The funds were coming from another 501(c)(3)...do we thank them? Why did they send us money? Who asked them to send us the money and what do we do with them?

It was a rare case to find anyone doing a good job of donor stewardship for the donors who initiated the grant requests.

TODAY
An average donor (without a donor-advised fund giving account) will determine how much they give based on “an amount I feel I can afford after basic expenses and personal discretionary spending.” Their charitable giving comes from their checking account. This is where the overwhelming amount of support comes from.

Donors of all kinds indicate they would give more if they had greater insight into the impact of my giving. Most organizations understand this. You know you need to engage with your donors so they can recall at least one satisfying outcome/impact of their giving.

Everyone in development is fully aware of the magnitude of funds being managed in donor advised fund accounts...something approaching \$100 billion...with a “b.” These funds can only be used for charitable purposes. Fidelity manages over \$20 billion, Schwab manages \$12 billion and Vanguard manages \$8 billion based on the latest fiscal year reports.

The near-term challenge for engaging donors with a donor-advised fund giving account is getting the word out often that you do accept donor-advised fund grants and are grateful for donations of any amount. The charitable sponsors themselves advertise “advice” to their own investor donors better than most nonprofits who receive the funds.

Charities can encourage donor-advised

fund gifts in a number of ways to achieve a common goal of increased, sustained support.

1. Charities should promote acceptance of donor-advised fund grants on their websites and in all their direct marketing communications.
2. Charities should acknowledge donor-advised fund donors. Most grants from Schwab Charitable and Fidelity Charitable include the donor names.
3. Charities should add the DAF Direct widget to their website, which allows individuals to grant from their donor-advised fund directly.

Schwab Charitable Donors Indicate...
“Having a Schwab Charitable account helps focus my giving strategy and increase the dif-



Photo: iStock/Getty Images

ference I can make each year.”
“My Schwab Charitable account makes it easy to donate appreciated stock to small charities that would not be able to accept it directly.”

FIDELITY CHARITABLE DONORS INDICATE...
“I made contributions back in the early days, and the amounts have grown over time. Fidelity Charitable has allowed me to give more, because I have more to give.”

“I’ll tell you, when you can do things for people you know really need it, really get good use out of it, you get a lot of satisfaction.”
“My passion for giving comes from helping the less fortunate. I get the most emphatic pleasure out of it. Hopefully, in my own little way, I’m making a little bit of difference in people’s lives.”

Doesn’t this sound just like what your donors tell you? These are regular, compassionate people who have set aside some funds so they may enjoy charitable giving for years to come.

Yes, you will hear of the extraordinary, large gifts. But for the most part, ongoing recurring gifts from a donor advised fund account will be in range of \$50, \$100, \$200, \$500 and \$1,000.

You should be encouraging anyone who has ever used a giving account for a grant of any amount, even the modest ones, to consider giving at a leadership level because they have the funds to consider it (which sets them apart from the regular donors relying on today’s balance for discretionary funds).

What’s next? Private label donor-advised funds offered directly by the nonprofit charity to its major donors. Morgan Stanley is an example (not an endorsement) of a bank who will manage a private label donor-advised fund for nonprofit organizations...they require higher minimum balances but will manage the funds for a lower cost basis. The benefit to all parties is the major donor can invest the funds with you and will work with you annually on advised grants to anyone; and you can manage

the relationship to greater donor satisfaction. You would expect to be one of the successor beneficiaries.

Oh, it might not need to be said to some generations, but there is an app for your smartphone for Fidelity Charitable donors.

Jack Doyle is president of Amergent. He has been involved with providing fundraising consulting services to a variety of nonprofit organizations since 1978 and celebrated his 30th anniversary of service at Amergent in 2016. He can be reached at jdoyle@amergent.com.

TESTING & TACTICS: PROVEN TECHNIQUES TO BOOST YOUR RESULTS

Don’t Get ‘Creative.’ Get Tactical!

By Moira Kavanagh & Dennis Lonergan



It’s a common marketing misconception: great creative sells. But great creative for nonprofit marketing, it pains us to say, isn’t about gorgeous copy and design. It’s about the data- and motivation-driven tactics behind those words and graphics. At Bridge 2018, we presented our tips for raising more money by, well, not getting too creative. Here are a few.

ASK NOT ‘WILL YOU CONTRIBUTE,’ BUT ‘HOW GENEROUSLY WILL YOU GIVE?’
Great fundraisers are actually great salespeople. Bad salespeople say, “Will you please buy my product?” Great ones say, “How many can I put you down for?”

It’s the same in fundraising. When shaping your offer (your ask), be confident in your product (“my organization’s awesome”). There’s no doubt it’s worthy of the prospect’s support; you just have to

facilitate their generosity. Rails-to-Trails Conservancy (Figure 1) demonstrated this principle in its calendar email campaign. In a test between attractive prose vs. simple order form, the form achieved double the response!

GET PERSONAL.
Some of the most effective copy isn’t even original: it’s the reader’s name! Use it whenever you can for a measurable response boost. Be resourceful with data, too: use relevant information specific to the donor, like a variable paragraph about local happenings or a fundraising goal for their city.

How you personalize a name can also spike response, as it did for Planned Parenthood Votes Ohio (Figure 2), where a personalized note in ballpoint pen showed through the envelope’s window.

BUILD, FAIL AND REBUILD SMART.
Creating effective direct response campaigns is less about whether a prospect will read it and more about whether they’ll respond. This doesn’t mean giving up authenticity, facts or warmth. But it does mean keeping a cold, hard focus on what works and what doesn’t and being prepared to dump non-performing creative no matter



FIGURE 2

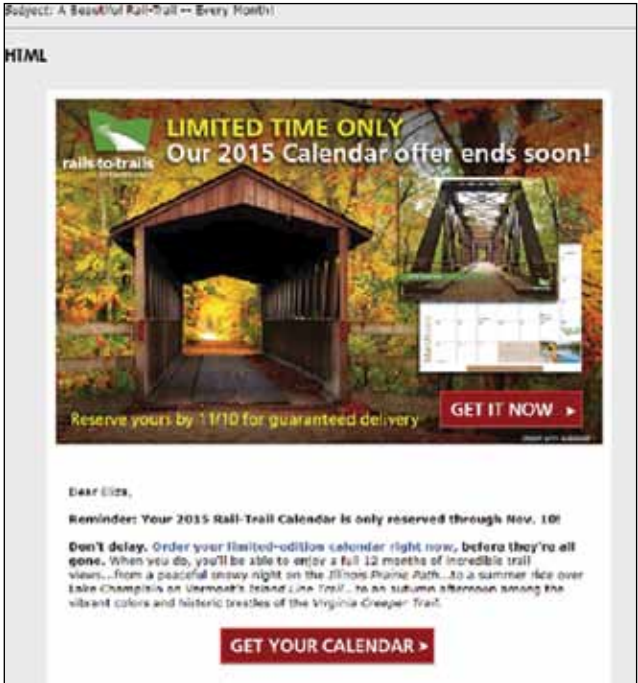


FIGURE 1



“YOU SHOULD BE ENCOURAGING ANYONE WHO HAS EVER USED A GIVING ACCOUNT FOR A GRANT OF ANY AMOUNT, EVEN THE MODEST ONES, TO CONSIDER GIVING AT A LEADERSHIP LEVEL BECAUSE THEY HAVE THE FUNDS TO CONSIDER IT.”

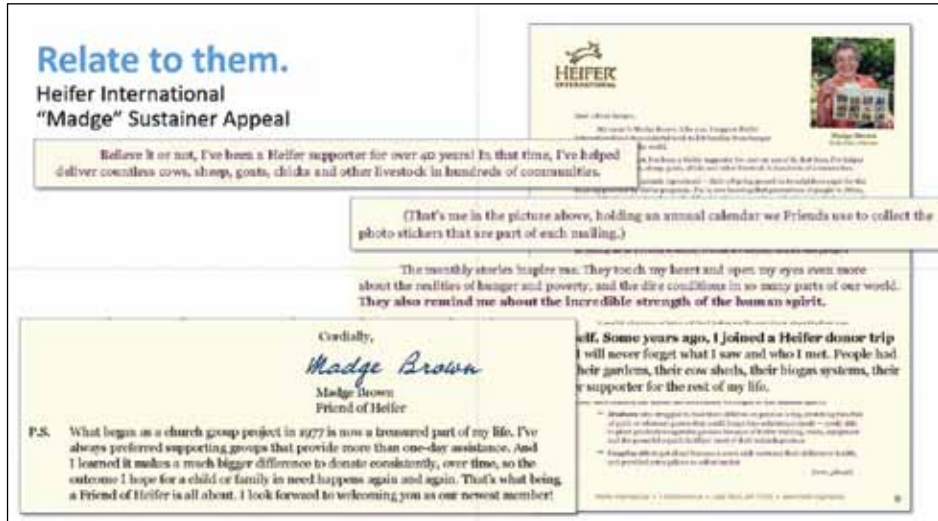


FIGURE 3

how much you love it.

When developing a campaign, think first of tactics you've already found effective with your supporters. For instance, participation certificates, deadlines, matching gift challenges, program-based personalization, certain premiums, etc. Identify those specific tactics and formats based on data before you think creatively about shaping your message to that framework.

Even then, don't get too attached; develop your creative so it can be tested and assessed quickly. If it fails, that's OK! Most do. By testing and process of elimination, you'll integrate other tactics with measurable potential to succeed.

MAKE THE APPEAL ABOUT THEM. It's easy to get caught up in how great your organization's numbers are—the millions helped, thousands fed, dozens of countries impacted. That's all fine, but donors are more interested in your cause than your competence. A great way to do that is to validate your cause—and their support—by a donor peer.

This sustainer invitation from Heifer International (Figure 3) is written from one of the program's longest-tenured members, a delightful Little Rock woman named Madge. In her own voice, she speaks to the prospect's primal concerns: to be on the right side of a good cause, following folks with similar values, confident they're making a good investment. Marge's letter delivers that in spades.

APPROACH FROM THEIR OWN BACKYARD.

Surveys are a somewhat hoary engagement device, but they work. Make yours work better by tailoring it to your donor's

life as much as possible. This National Park Foundation package (Figure 4) asks prospects to represent their state, in this case Oregon, in an important survey about our wonderful parks. It's further personalized with parks in their state. If your issue supports an even deeper connection, ask questions that actually mean something and give prospects greater motivation to answer and give. Compassion & Choices (Figure 5, page 11), which advocates for medical aid in dying and improved end-of-life care, cut to the heart of one of their foremost objectives: encouraging every American to have an end-of-life plan they can trust will be implemented.

DRESS DOWN.

We all love beautiful packages we post on our refrigerators. But the sad fact is that plain and simple invariably beats bright and colorful, especially when a package is transactional in nature, like this National Parks

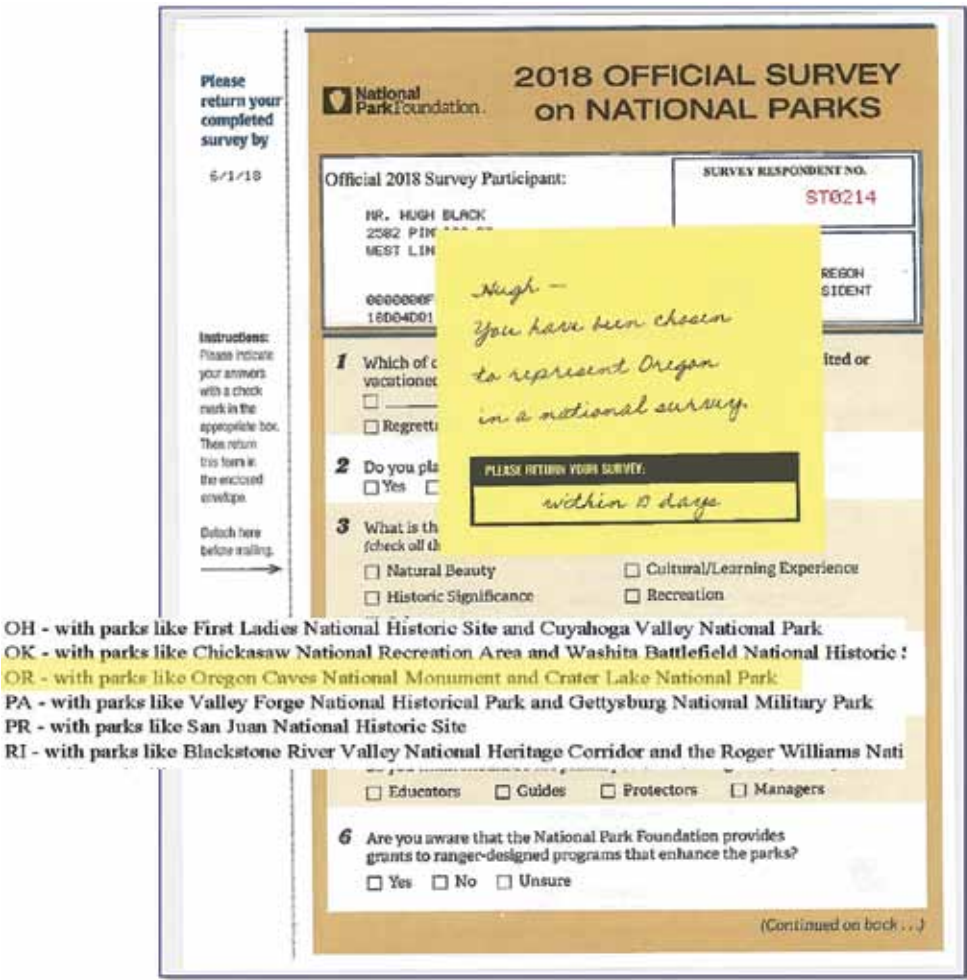


FIGURE 4

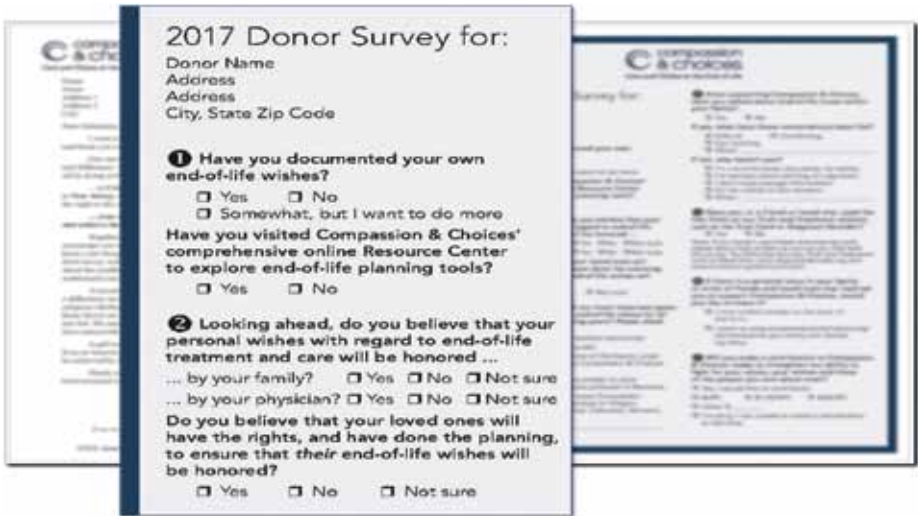


FIGURE 5

Foundation calendar receipt (Figure 6). The four-color carrier we loved was soundly defeated by much drearier alternatives. And while there may be no accounting for taste, there's also no way around response rates.

A FINAL WORD ON CREATIVE.

And now, a confession. We think great direct response is WILDLY creative! No other medium requires quite the same mix of critical thinking, original analysis or contemplation of human motivations, from fear to desire to compassion. True, it may look like a homely order form, or a plain



FIGURE 6



AN INDUSTRY VETERAN
SERVING A DIVERSE
GROUP OF CLIENTS
FOR MORE THAN
37 YEARS.

LET US PARTNER IN YOUR SUCCESS
TOGETHER WE CAN MAKE IT HAPPEN

Color Digital
Printing

Laser
Personalization

Inkjet
Addressing

List
Hygiene

Data
Presorts

Direct Mail
Services

Custom
Projects

Conference
Packages

Fulfillment

WWW.AMIDIRECT.COM
703-370-0382

brown closed face carrier, or just a name scribbled in ballpoint pen; but in nonprofit direct marketing, we see nothing less than art—and hope for the world we believe in.

Dennis Loneragan is president and creative director at Eidolon Communications in New York. He can be reached at dbf@eidolonnyc.com

Maira Kavanagh is president and founder of MKDM. She can be reached at mkavanagh@mkdmc.com or (434)295-6041.

Be Unique. Be Creative.
Be Rewarded.

Continued from page 1

take all of your fundraising creative and print it out (even your digital ads, emails and video screenshots). Now pin it to the wall. When you glance at it, is it all speaking the same visual language? When you read it, is it all speaking with the same voice? This is the donor experience.

Over a year ago, Habitat for Humanity NYC was suffering from inconsistent messaging and conflicting campaign elements. It was affecting their brand understanding among donors and their bottom-line. My creative team worked with Habitat NYC to rebuild their fundraising creative from the ground up using two powerful strategies.

1. BRAND CONSTRUCTION

It isn't possible to capture your uniqueness if you don't know what makes you truly unique. Use classic branding exercises to construct a unique brand promise from the basic values of your organization.

For Habitat NYC, the "brand house" seemed most apropos (Figure 2). From their foundational values of "everyone deserves a decent place to live" and "unite New Yorkers around the cause of affordable housing," we worked our way up the house to define the brand promise of "New Yorkers shape New York." It was a concept that would guide everything that followed.

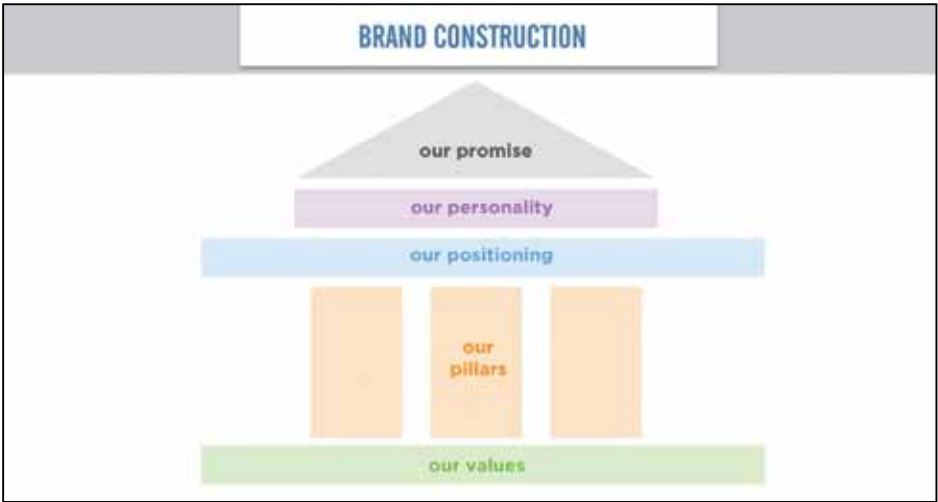


FIGURE 2

2. UMBRELLA CAMPAIGN

Boil down the core message of your cause. With your brand promise in tow, create a campaign concept that can be an umbrella for all your channels—from direct mail to digital, and everything in between. Make it a simple platform that you can build anything on top of. For Habitat NYC, the campaign we created would illustrate how the organiza-



FIGURE 3

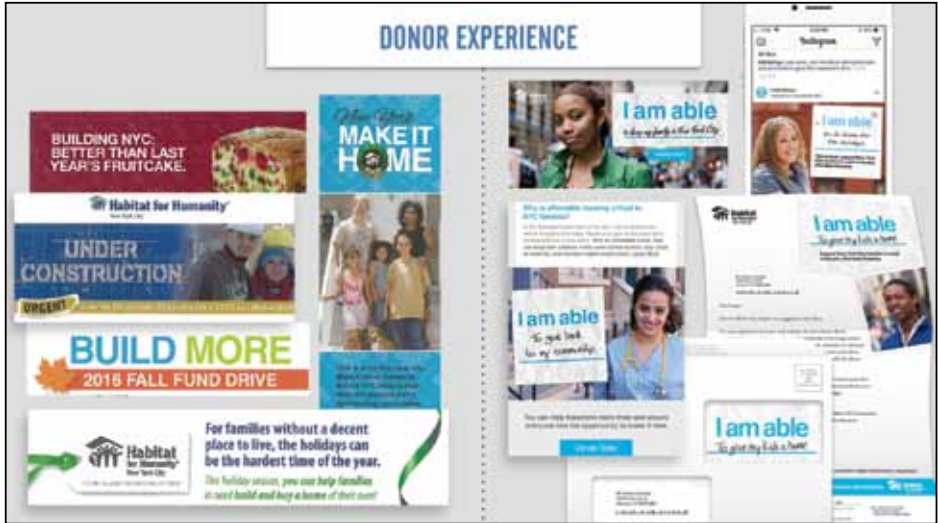


FIGURE 4

sation platform made it possible and made sure each touch point was connected.

By creating a strong thread between all fundraising communications, your touchpoints won't compete with each other and you will gain donation intent from your audience more quickly. Just one look at Habitat NYC's donor experience before and after the umbrella campaign illustrates this effect (Figure 4).

Your donors' attention span is eight seconds or less. The average donor supports three to four organizations and is solicited by many more. Surprise them with an unexpected visual theme that breaks through. Quickly communicate why they should care about your cause. Tell them something they've never heard before. And let your brand drive everything you put in market. You need to be creative. You need to be unique. You will be rewarded with long-term success instead of short-term gains.

Daniel Brown is the executive creative director at True North and spearheads the creative strategy for global nonprofit and consumer brands. Daniel can be reached at daniel.brown@truenorthinc.com and is seeking stalkers on LinkedIn.

Marketing AdVents

FAST-ACTION DIRECTORY

DMAW Headquarters email: info@dmaw.org
DMAW Headquarters phone: 703-689-DMAW (3629)
Articles: Submit to Nhu Te, Editor, 215-238-5431 Email: dmawadvents@dmaw.org
AdVents Advertising: Terri Jones, 703-471-4902 Email: tjones@dmaw.org
Inserts: Require prior approval, must be related to DMAW events and meet USPS requirements. Contact DMAW HQs for more information.
Job Exchange: Submit via email to Ann Walsh, ann@dmaw.org, to receive a reply confirming cost. Payment required prior to posting online. Deadline for print version is the 15th of the month preceding publication. All ads posted to website within 24 hours. Costs: Members - \$100 for first 50 words and \$1 for each additional word. Not-Yet-Members - \$200 for first 50 words and \$1 for each additional word.
News Notes: Submit items of professional interest or significant personal news about members to Editor Nhu Te.
Deadline for Articles and News Notes: 15th of the second month preceding issue date (e.g., deadline for May issue is March 15).
Subscriptions: Marketing AdVents is a member benefit of the Direct Marketing Association of Washington, Inc. A variety of individual and corporate memberships are available. Contact DMAW 703-689-DMAW (3629) for details.
Publisher: Direct Marketing Association of Washington, 11709 Bowman Green Drive, Reston, VA 20190-3501 website www.dmaw.org.

Executive Director: Donna Tschiffely 703-689-3629, donna@dmaw.org
Editor: Nhu Te 215-238-5431, dmawadvents@dmaw.org
Advertising: Terri Jones 703-471-4902, tjones@dmaw.org
Design: Albert J. Gaspari NAPCO Media, 215-238-5366

Marketing AdVents is published monthly by the Direct Marketing Association of Washington, Inc. to inform its 1,000+ members in the Mid-Atlantic region of current DMAW events and programs, present articles of professional interest, and provide marketing professionals the tools and education to excel in the direct marketing arena.

Mount Royal
Printing & Communications
6310 Blair Hill Lane
Baltimore, MD 21209
410-296-1117

NAPCOMEDIA
1500 Spring Garden St.,
12th Floor
Philadelphia, PA 19130
215-238-5300

News Notes

● **The United States Postal Service** has filed notice with the Postal Regulatory Commission of price changes that will take effect on Jan. 27, 2019, according to a USPS press release. The proposed prices, which have been approved by the governors of the USPS, are raising Mailing Services products roughly 2.5 percent—increase in price will vary from service to service. If the PRC is in favor of the price increases, the new prices will include a \$0.05 increase in the price of a First-Class Forever stamp (\$0.55 vs. original \$0.50). Additionally, The single-piece additional ounce price will be reduced to \$0.15—a two ounce stamped letter, like a wedding invitation, will cost less to mail, decreasing from \$0.71 to \$0.70, the release said. Before the new prices are to take effect on Jan. 27, the PRC will review the new proposed pricing.

● At the 2018 International Fundraising Conference, which took place in Noodwijkhout, Holland, **Geoff Peters, chair-**



man of the board for Creative Direct Response Fund-raising Group, presented during the "Big Room Session." There, he discussed human biometric response to fundraising stimuli. According to a press release, the scientific study of neurofundraising is helping nonprofits understand, measure and increase effectiveness within a targeted donor base. Peters has played an important role in the founding of the direct marketing industry's first an only neuromarketing lab, which has been devoted to nonprofit fundraising for the last two years. During his presentation, he discussed verified test results that show that the lab helps identify barriers to giving through the review of landing pages, DRTV ads, direct mail packages and more. "I am excited about bringing something new to the process of helping charities accomplish their missions. I couldn't be prouder of our team and the breakthroughs they have accomplished and the effect this is having on charities all over the globe," Peters said.

Photo: iStock/Getty Images



2018 THE BEST of DIRECT
Spotlight on Achievement

Tuesday, Dec 4
6-9PM
National Press Club
Washington, DC

Hall of Leaders Award
Industry All-Star
Rising Star
Volunteer of the Year
Partner of the Year
DMAW-DMAW/EF Key Contributor Award
DMAW Board Appreciation Award

KATE CARR
JIM DOYLE
JOSEPH GOETZ
STEPHEN GODBOUT
L&E MERIDIAN
AMERICAN UNIVERSITY
JEFF THOMAS

DMAW Educational Foundation

Out of the Mouths of Marketing Babes

By Bruce Gregoire



I have been fortunate to spend the last 18 years as adjunct professor in the graduate marketing program at the Carey School of Business, Johns Hopkins University.

When I begin each class, my first question to students goes something like this: "How many of you have a visceral reaction to getting what you might call, 'junk mail'?"

These students are getting their MBA, most with a marketing degree. Half or more will raise their hand.

This moment in time begins the student's journey into direct marketing. I share this to create a picture of what you should expect when meeting a fresh-faced MBA student: More often than not, a blank slate. You also may find, as I have, their refreshing inno-

cence and eagerness to learn new topics.

But it helps to take a step back and consider how important DMAW/EF and DMAW have become in offering training and education for direct marketing "newbies." Consider the following conversations and typical student misunderstandings:

CONVERSATION NO. 1: DIRECT MAIL IS A WASTE.

Conversation No. 1 reality check: A business can't afford scatter-shot marketing, but rather, needs to chase the highest ROI, which means "targeting"—how it works, what metrics are most valuable (specifically RFM analysis) and, most importantly, repeated testing to find what works.

STUDENTS LOVE WAR STORIES

At some point the "what works" discussion veers toward the famous quote from John Wanamaker (1838-1922), the department store magnate from Philadelphia. He is credited with coining the phrase, "Half the money I spend on advertising is wasted; the trouble is I don't know which half."

This story resonates with students. They get it.

Most of them have encountered the 80/20 rule at some time in their journey. Targeting—especially with direct mail—exemplifies this narrative. I tell students direct marketers are trained to measure success using A/B split testing. Holding back a test group and comparing results to the mailed portion can establish the "lift" of the mailed portion. Students see this as similar to the "controlled experiments" they did back in science class in younger days...which brings us to the overall importance of storytelling with new students.

Marketing success stories (and also stories of dramatic marketing failure) occupy a special place with students—and this is where DMAW/EF helps us shine.

More than anything else, working profes-

sionals bring to the table occasional war stories and real-life experiences that illustrate the content a textbook cannot.

In November 2012, just days after the re-election of President Obama, my scheduled guest speaker was forced to cancel. So instead, I encouraged the class to pivot to the very topical news of the day: the extremely targeted and successful outreach by Obama's social media campaign—really the first of its kind. As luck would have it, I had a small group of savvy social media students who could explain that success story to the remainder of the class.

CONVERSATION NO. 2: CRM IS THE DOMAIN OF TECHNOLOGY

Conversation No. 2 reality check: Most students have heard of CRM [Customer Relationship Management]. Many assume CRM means technology. In truth, this is a limited view because CRM is both a technology and a philosophy of customer focus, namely, putting the customer at the center of all operational functions.

Sometimes students miss this point completely. One in particular comes to mind. Despite my emphasis for eight weeks describing customer focus versus staff convenience, he smiled throughout his final class presentation, so happy to describe how a CRM installation at his workplace was going to make his life so much easier. OUCH!

Thank you for helping recognize the role the Educational Foundation plays—and, with your help, will continue to play—in educating today's marketing workforce about the vital role of direct marketing and CRM.

Bruce Gregoire is founder and CEO of WiseGuys Marketing, in Falls Church, Va. Since 1998, WiseGuys has helped direct marketers target their customers with the right offer at the right time—using RFM algorithms and data-driven CRM software. In addition, Bruce teaches CRM in the graduate marketing department of the Carey Business School, Johns Hopkins University. For further questions about CRM, Bruce can be reached at (703) 941-8109.

Did You Know?

The DMAW/EF, a separate nonprofit organization from DMAW, relies heavily on contributions from DMAW members to fund its work.

Please donate today!



Member Spotlight

As a young girl, Claire Moore was very interested in marketing and advertising—her walls were plastered with magazine ads. She also was involved in volunteering and fundraising for various charities, so direct marketing fundraising married her two passions. She believes that the time spent working in the sector is worth it because she is doing a little part in helping make a difference with the great clients she works with.

After college, she started with ABD Direct and has been with the company for over eight years. In her time at ABD, she has played an essential role on all stages of direct response. In her earlier years, her focus was on production and then into project management; now, she is involved in creative and strategy. She's lucky to work with a lot of different clients, trying to make the world a better place by saving the environment and animals; fighting for human rights; providing international humanitarian relief; and fighting for women's rights.

Location: Reston, Va.

Education: Radnor University, Bachelor of Business Administration in Marketing

DMAW Member Since: 2010
Who do you consider your mentors?

My parents will always be my sounding board and mentors. When I was younger, they made sure to instill a strong work ethic in my with all my chores I despised at the time—and by helping me with my blueberry muffin business. My parents also stress the importance of taking a moment to pause and appreci-

ate life with family and friends. In the industry, Joe Manes, who always makes work fun with his humor and creativity, and Marie Dullea-Prentice, whose compassion for her clients and colleagues was admirable. I learned so much of direct response from her, but, more importantly, her wisdom in all aspects of life.

What advice would you offer a novice who wants to move up in direct marketing?

Look for inspiration for an upcoming campaign everywhere. I covet looking through my mailbox every day to see what different companies are sending me: invitations, magazines, even bills have great techniques you can pull from. It's so important to bring fresh ideas to the table when you are having a project brainstorm.

What is the most helpful step you took to advance your direct marketing career?

I always try to take initiative and volunteer to take on more tasks, so I can hone my skills and learn more about direct marketing. When I have a new area of interest I'd like to learn more about, I reach out colleagues or look for DMAW events on the topic.

Tell us about your volunteer experiences with DMAW.

I have attended many DMAW events, and I am looking forward to volunteering in the future.

Describe yourself in three words.

Organized, creative, caffeinated.

Describe your life in six words.
Balancing work, family, friends and health.



CLAIRE MOORE

Account Executive
ABD Direct

claire.moore@abdata.com

Claire's Favorites



Restaurant Fiola Mare



Films "The Game"



Books "How to Walk Away"
by Katherine Center



Music No Doubt, 311, Calvin Harris



Leisure Interests Pilates, traveling, cooking, reading, enjoying chocolate and wine.



Quote "Our lives begin to end the day we become silent about the things that matter." — Dr. Martin Luther King, Jr.

WHAT WE DO BEST:

PRINT. MAIL. INNOVATE.

Japs-Olson Company is your direct mail production solution provider.
To receive our sample kit, contact Debbie Roth at
debbie.roth@japsolson.com or 952-912-1440.



JAPS-OLSON COMPANY
Commercial Print & Direct Mailers





