Have you ever found treasure in your own backyard? If not, maybe it’s time you took a look at your lapsed donor file. Although it may not seem like a valuable resource, it is an untapped universe of people who have proven their affinity for your cause.

The reality is, many organizations rely solely on acquisition to feed their house file. Each year, they invest millions in donor acquisition campaigns that may earn as little as 70 cents on the dollar. Even some of the best acquisition efforts earn only 90 cents on the dollar, and are viewed as successful programs. Although this loss is typically recovered after the newly acquired donors make their second or third contribution, it might be two or three years before the nonprofit reaps any reward for its initial effort. That’s a long time to wait to raise much-needed funds in today’s competitive fundraising environment. Meanwhile, many organizations try a variety of acquisition methods to grow their donor file when the answer truly does lie “in their own backyard.”

Instead of letting a lapsed donor file collect dust while you launch yet another costly acquisition campaign, stretch your return on investment with a well-planned reactivation campaign. Many organizations are discovering that a reactivated lapsed donor is significantly more valuable than a newly acquired donor. They are finding that the lapsed donors have a greater affinity for the organization, and, from a financial perspective, they are not starting in the red, as they do when they acquire a donor through the mail. Lapsed donors are also more likely to give again in the future because they are essentially repeat donors.

Unsure? Test.

As with any direct marketing campaign, testing is the key to success. It can’t be stressed enough: Test and measure, test and measure, test and measure. It is not necessary to roll out a campaign to your entire file that goes back 10 years and has hundreds of thousands of lapsed contributors’ names. Test and measure the results until you determine the point at which it is no longer cost-effective to continue. Some organizations may only be able to tap into donors who are three-years lapsed, while others may be able to dig even deeper if the appeal is compelling. When determining the giving level that is most effective for your organization, be sure to be as empirical as you were when considering giving
The 2005 – 2006 Leadership
Following are the members of the DMA Nonprofit Federation’s Advisory Council with leadership responsibilities:

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Angie Moore
American Cancer Society

Vice Chair
Tim Burgess
Domain Group

Members
Mary Arnold
Christian Children’s Fund
Kelly Browning
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Jack Doyle
Amergent
Craig Floyd
National Law Enforcement Officers Memorial Fund
Lindy Litrides
Litrides & Associates
Mary Arnold
Christian Children’s Fund
Kelly Browning
American Institute for Cancer Research
Phil Claiborne
Elks Magazine
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Easter Seals
Bobby Dean
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Jack Doyle
Amergent
Craig Floyd
National Law Enforcement Officers Memorial Fund
Lindy Litrides
Litrides & Associates

Letter from the Vice Chair
Timothy Burgess, Co-Founder and Senior Strategist, Domain Group

Have you ever tried to define your job to a friend or family member? I was pondering this a few weeks back, and asked a couple of industry colleagues to suggest a proper definition. Here’s what we came up with:

“Direct marketing for nonprofit organizations and direct response fundraising utilize multiple media channels — direct mail, telephone, the Internet, newspapers, magazines, inserts, radio, and television — to educate and motivate individuals to make contributions, volunteer their time, and advocate on behalf of nonprofit organizations in order to accomplish specific humanitarian, social, economic, health, environmental, religious, public policy, or political objectives.”

That’s a mouthful, for sure. But this definition properly captures what the members of the DMA Nonprofit Federation do every day in our jobs.

Three phrases from this definition stand out to me as very significant.

First, “utilize multiple media channels.” Our industry has changed remarkably over the past few years as our methods of communication have evolved. It’s not just about direct mail any longer, although direct mail remains a central communication channel. Outbound telemarketing, the Internet, print advertising, statement and product inserts, and radio and television are playing an increasingly important role. I hope you have started to experiment in these alternative channels.

Second, “motivate individuals to make contributions, volunteer their time, and advocate on behalf of nonprofit organizations.” All of us in the Nonprofit Federation are engaged in doing much more than just raising money. We are helping nonprofit organizations engage fully with their constituents on multiple levels, including recruiting volunteers and helping constituents advocate for the causes they cherish. Those of us involved in fundraising are actually providing a wonderful service to people who want to do good things with their money and time.

Finally, the third important phrase from this definition is, “in order to accomplish specific humanitarian, social, economic, health, environmental, religious, public policy,
That explains why we do our work. It’s a reminder that we are engaged in an enterprise of significant value. It’s an affirmation that what we do as direct response professionals for nonprofit organizations really matters.

I encourage you to make a copy of this definition and post it in your work space so you are reminded every day of the significant work you do. When you prepare an appeal letter or a newsletter, when you respond to a donor’s question, when you give donors the opportunity to share their opinion and advocate on your behalf, you are providing a wonderful service to your donors. Don’t ever think otherwise.

As you read this issue of the Journal, keep this definition in mind. You are engaged in a truly honorable profession.

Timothy Burgess is co-founder of the Domain Group, an international direct marketing firm serving nonprofit organizations in North America and Europe. He serves as vice chair of the advisory council of the DMA Nonprofit Federation, and chairs the Federation’s ethics committee. He can be reached at tim.burgess@thedomaingroup.com, or 206.834.1480.
frequency. For some organizations, the threshold may be $15, while others may start at $25. Again, the key is to test and measure every aspect of the campaign.

### Telephone Communication Works

Regardless of the giving level or how far back you dig into your lapsed donor file, the phone is an ideal channel for a reactivation campaign. A professional telephone communicator (agent) can make a warm, personalized presentation that appeals to a donor who has overlooked dozens of mailings. They can also gather valuable information about your donors, which will enable you to identify giving trends. In addition, a communicator can often convey the urgency of a funds shortage more effectively than a mailing. It is a lot easier to ignore 25 or 30 mailings than a timely plea for help from an experienced communicator who serves as a personal extension of the organization.

### So Do Letter-Writing Campaigns

Don’t be afraid to try an alternative form of lapsed reactivation. Many organizations are able to enlist the help of lapsed donors in a letter-writing campaign to their friends and family. These campaigns typically have low overhead costs, produce a very high return on investment, and spark a new interest in the donor for your cause by getting them actively involved. They also allow you to tap into a new source of friends for your organization by allowing supporters to identify potential donors. More importantly, this type of program can often allow you to utilize some of your deepest lapsed donors and lower giving levels.

### Practice Multidimensional Fundraising

If you haven’t discovered the potential of a reactivation campaign, you will be pleasantly surprised with the results. On average, there is a break-even or higher return on investment. All too often, organizations divide their fundraising strategy between renewing lapsed donors and acquisition, spending more time and money on the latter. However, acquisition and renewal complement each other and should be thought of as essential components of one strategy. A multidimensional fundraising effort will ensure a healthy house file that performs well for years to come.

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Nate Drushell is director of marketing for InfoCision Management Corporation’s nonprofit fundraising division. Since joining the company in 1997, Nate has pioneered successful fundraising campaigns for many of the world’s largest organizations. He may be reached at 330.670.5112 or nate.drushell@infocision.com.

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**Find Treasure in Your Own Backyard...**

*Continued from Page 1*

2005 NEW YORK NONPROFIT CONFERENCE PHOTOS

*See pages 28-29*
Successful Fundraisers Know When Donors Will Say YES!

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When a major disaster occurs such as Hurricane Katrina, the Dec. 2004 SE Asia tsunami, or the 9/11 terrorist attacks, donors appropriately give generously to relief efforts. Meanwhile, in the aftermath, many nonprofits focused on non-disaster missions often are concerned about the potential adverse impact on their fundraising. They worry that donors will send their charitable dollars to disaster relief groups, leaving little, if any, money for their organizations. They grapple with how best to communicate with constituents to drive giving, while being sensitive to the important needs and work of relief organizations.

However, empirical data suggest that, in aggregate, non-relief nonprofits do not suffer prolonged negative fundraising impacts following major disasters. According to research by the Target Analysis Group, the SE Asia tsunami actually may have stimulated philanthropy for these types of organizations.

Similarly, the 9/11 terrorist attacks alone did not seem to cause a significant drop in giving to non-relief charities. Target Analysis Group’s evaluation of actual giving histories from 22 national fundraising organizations indicates that the economy played a greater role in the overall fundraising performance of these groups than the events of 9/11 or the subsequent postal delivery issues due to anthrax scares.

“Despite substantial gifts for the Southeast Asia tsunami, most non-relief charities experienced strong increases in both revenue and numbers of donors in the first quarter of 2005, according to the Index of National Fundraising Performance. The index, developed by Cambridge, Mass.-based Target Analysis Group, examines giving patterns from 46 large national organizations involved in a wide variety of causes. In the first quarter (Q1) of 2005, these organizations accounted for more than 12 million donors, 15 million gifts, and almost $430 million in revenue.”

donorCentrics™ Index of National Fundraising Performance
August 22, 2005

One explanation for the limited adverse impact on non-relief agencies is that many people giving to disaster-focused nonprofits were first-time donors, versus people who routinely give to nonprofits and made a choice to give to relief groups instead of other types of organizations. Recent highly visible disasters in tandem with Internet-based marketing have tangibly contributed to expanding the donor pool.

Given this data, when a disaster hits, non-relief organizations should take a measured – versus crisis-oriented – communications approach. Consider the following three approaches.

**Approach One: Continue to Communicate and Link Your Mission**

After a respectful pause, continue mission-related e-mail communications. Start by acknowledging the disaster, and the need to fund relief efforts. If appropriate, an organization should find linkages between its mission and work with the relief efforts to make these communications salient. The Ocean Conservancy’s e-mail, sent approximately two weeks after Katrina, is a great example. In it, the group clearly acknowledged the severe impact of the hurricane and expressed sympathy for those affected by the disaster. The group then discussed the extent of environmental damage caused by Katrina and the importance of restoration efforts for the surrounding coasts and wetlands.

Continued on Page 8
Epsilon Fundraising Group

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Fundraising after Natural Disasters and Crises...
Continued from Page 6

Approach Two: Conduct a Micro-campaign

An organization involved in supporting relief efforts (even though it is not a relief agency per se) should adopt a proactive fundraising strategy using the online “micro-campaign” technique. A micro-campaign is a context-specific fundraising effort for which a group:

• Creates a campaign-specific donation form and associated content on its Web site
• Promotes the campaign on its Web site, via e-mail, and through third-party “referring” sites
• Sustains ongoing communications with constituents to update them on relief efforts and solicit additional contributions

After Hurricane Katrina, a number of nonprofits that promote animal welfare, including the American Society for the Prevention of Cruelty to Animals (ASPCA), the American Humane Association, and the SPCA of Texas – all involved in Katrina-related animal welfare operations – conducted substantial online “micro-campaigns,” raising millions of dollars in days.

Approach Three: Be a Fundraising Agent for Relief Efforts

A nonprofit can act as a fundraising agent for relief efforts, tapping its own constituency. The American Diabetes Association (ADA), the American Cancer Society, and the American Heart Association jointly contributed $1 million to the Bush-Clinton Katrina Fund. ADA also launched an online appeal to its constituency. While a non-relief nonprofit may fear that gifts solicited for a disaster group will detract from its core fundraising programs, a lift in participation rates among prospects on file is actually more likely. In addition to providing urgently needed aid in the wake of a disaster, this tactic reinforces an important message to the non-relief nonprofit’s constituency – that it is a responsible organization.

After a disaster, a non-relief agency can use the Internet as a timely and cost-effective method for communicating with its constituency, relationship building, and fundraising. An organization that is not directly involved in relief efforts should be measured, versus crisis-oriented, in its online communications. After a respectful period, communicate anew with constituents and, if appropriate, show saliency to the disaster relief efforts. A non-relief group directly supporting relief work associated with its mission should adopt a proactive online fundraising approach.

Vinay Bhagat is the founder, chairman, and chief strategy office of Convio, Inc. In the three weeks immediately following Hurricane Katrina, nonprofits using Convio’s Internet tools collectively raised more than $110 million online for related disaster relief efforts.

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One lesson we are learning after the hurricane disasters, the tsunami devastation, and the earthquakes of this year is that nonprofits are better, faster, and more responsive than government in many unique ways. Nonprofit organizations are needed now more than ever before, and fundraising has never been as important.

Look at the photos: You will see good people helping shattered lives through charity. Look at the numbers: Red Cross, Catholic Relief Services, Salvation Army – the list goes on – all had record levels of support after the disasters struck. Our non-disaster relief charities are helping in thousands of other ways each day. People are giving, and charities are helping. This is tremendous news for our sector.

In the midst of such support, like nails dragging across a chalkboard, government and media hone in on “charity fraud.” Self-appointed charity watchdog groups warn that fraud is on the rise, but isn’t it time to showcase the small victories that charities achieve each day? Not simply during bad times and major disasters, but every day, one of our 300+ organizations is doing something to improve an individual’s course in life. We can prove it. We can’t prove charity fraud will go away if we add more layers and burdens on legitimate organizations, as elected officials seek to do. Let’s not even try.

So, is there a public crisis in confidence, as is painted by public reports? Are your supporters going to fade away if you do not show them shoeboxes of documentation, rather than taking them by the hand and showing them your successes?

From a measurement standpoint, we don’t know. There does not seem to be a single national metric, or single litmus test, to measure support, as you know. For now, as an organization, we will try to determine the level of confidence in nonprofits by donors through research this year, but the best story will be told in your individual response rates.

Am I saying to stick your heads in the sand and ignore negative media/third-party watchdogs? No. Combat this with the facts: show success, and for every bad story of theft, let’s swing back with factual information about nonprofit service. Remember that individuals donated over $187.92 billion in 2004 – and that over 75% of all giving is by individuals.

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Major gift fundraising is as much an art as a science. Support by individuals makes up the majority of giving to philanthropic organizations, and major gifts from individuals can account for up to 90% of annual donations to nonprofit organizations — often from as little as 5% of annual donors. Major gift officers have two challenges: The first is identifying major gift prospects (the science of major gift fundraising); the second is asking for a gift (the art of major gift fundraising).

First — Science

Identifying major gift prospects is the “scientific” part of major gift fundraising because it relies upon a number of quantifiable information sources. These include the following three sources.

- The donor’s record of prior giving. How much has a donor given to your organization? How often and how recently? An individual who has been giving $500.00 to your organization every year for several years, in fact may be a better major gift prospect than a donor who gave one gift of $5000.00 several years ago.
- Electronic database screening to identify donors with significant giving capability is another source of data.
- Finally, individuals who have shown an interest in the work of your organization can be a great source of referrals to peers who might also be willing to consider a major gift.

Once your major gift prospects have been identified, the next step is assigning a “target ask” amount to a major gift prospect, and prioritizing them for solicitation. Again, this is a relatively “quantifiable” process. To determine a target ask level, consider the donor’s prior giving history. As a rule of thumb, a major gift (payable over a number of years) should be at least five times the donor’s annual gift, and it should be considered a gift in addition to annual giving.

Another way to rate prospects is to screen names with select Board members, key staff members, and volunteers. (When sharing any financial information about prospective donors with others, especially volunteers, it is important to stress that the information being shared is confidential!) In addition to helping identify an appropriate ask amount, this screening will also help you to decide who should make the actual solicitation. Finally, has the donor given you any information or clues about his or her financial status? Are they about to retire? Or do they have children graduating from college?

Second — Art

Making the request for a major gift is the point where the “art” of major gift fundraising comes into play. When planning solicitations, it is useful to utilize cultivation/solicitation teams. Ideally, they should consist of two...
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people: One who is skilled at making the case, and one who is comfortable making the request. Also consider whether at least one member of the team is a peer of the person being solicited – someone to whom the prospect will have difficulty saying “no.”

Some key points to keep in mind when soliciting donations:

• When making the visit, be relaxed. For the most part, your major gift prospects should be prior donors who are favorably inclined toward your organization.

• Be sure to thank the prospect for agreeing to meet with you, and for their prior support.

• Although you may be anxious to make your presentation and get the request over with, don’t rush to make your case. Be a good listener, and don’t rush: Most major gift calls take 30 minutes to an hour or more, and the more information a prospect provides up front, the better positioned you will be to develop the proper solicitation approach.

• When making the case, it is important that your approach be personal and positive at all times. Remember, when you are asking for a large gift, you are representing not just yourself, but all of the institution and its stakeholders. Be enthusiastic!

• After presenting the case, have the member of the solicitation team designated to make the request ask for consideration of a gift. Be sure to put a specific dollar figure on the table. Your request should encourage the prospect to reach. Many times, major gift efforts are sabotaged by the failure to ask for as much as research has indicated the donor can give. If this is too much, the donor will let you know. By asking for too little, you run the risk of insulting your prospect.

• Once the request has been made, allow the donor to respond, no matter how tempted you are to fill the silence that inevitably occurs.
while the prospect considers the request.

• Many times a prospect will respond that he or she needs more time to consider the request. This is a positive response! Don’t push for a decision, but schedule a time (preferably within a week to 10 days, if the prospect’s schedule permits) to follow up.

Always Say Thank You

Finally, after you conclude the visit and have returned to your office, thank the donor, even if the answer is “no.” The single biggest fundraising mistake that institutions make is not thanking the donor. If the solicitation was successful, make sure a letter confirming the details of the gift is sent out promptly; a personal thank-you note from the solicitors is often a nice touch.

It is impossible to “over-thank” a donor.

Stephen Manzi is executive vice-president of Changing Our World, Inc, a leading philanthropic and fundraising services firm combining innovation with sound fundamentals. He can be reached at smanzi@changingourworld.com.

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Sending a timely, relevant thank-you letter in return for any gift is the prudent and mannerly thing to do—both in our private lives and in business. It’s all about preserving a relationship, communicating appropriately, and establishing and maintaining a personal style.

Miss Manners taught us the rules of etiquette when writing personal thank-you notes, but what of a donor program with hundreds, thousands, or millions of donors? What are the rules? And who gets to write them?

Rather than jump on my personal soapbox, I sought the advice of nonprofit development professionals and agency consultants. Surely, some of the best and brightest would point me to a sound strategy and set of rules.

It didn’t happen. The answer is, there are no absolute rules. In fact, many top fundraisers I surveyed could not come to a consensus as to how to acknowledge a gift. Here are some of their thoughts.

When to Say “Thanks”

Everyone on my panel did agree that a speedy reply by mail is vital. More than a dozen professionals claim they send a thank-you communication within two days to two weeks of a donation— with the average being less than a week.

The acknowledgement should come in the mail and reflect the style and mission of the organization. E-mail gifts should be recognized immediately with an e-mail reply.

John Graham, vice president of ministry advancement at In Touch Ministries in Atlanta, GA, says, “Timing is critical. Mail your receipts daily. Response and cash flow will improve dramatically. Do not send receipts out weekly or monthly. When this happens, donor bonding is eroded, contribution revenue is not maximized, and cash flow is deferred.”

A long view comes from Ken Burnett, author of Relationship Fundraising, and chairman of the Cascade Group: “All gifts should be acknowledged. It’s only polite. Plus, a prompt and appropriate thank-you leads to bigger gifts. The lady who sends you $10 today may in the future leave you a bequest of her house on Key Biscayne. But only if you are nice to her. If you are not, or ignore her—well, what do you think?”

Mal Warwick, founder and chairman of Mal Warwick and Associates of Berkeley, CA, has sympathy for the mountain of work involved: “Same-day turnaround is ideal. In the real world, less than one week is often the best that I can hope for.” As for sending a thank-you note for every gift, Warwick says there may be exceptions. “Acknowledge all gifts—when the client is willing to spring for the cost. Certainly $15 and up or $25 and up, if they’re really hard-nosed.”

But, if you are wrestling with whether or not to acknowledge every gift, think about the average gift of your donor file. Brian Terpstra, account director at LW Robbins and Associates in Holliston, MA, advises doing a quick file audit first. “For some nonprofits with the average gift in the $10 to $12 range, it is vital to acknowledge at the lower end. Low donors may be the critical mass the nonprofit has on its file,” he says. “For others, with average gifts in the $15 to $50 range, it may not be cost-effective to acknowledge the $5 and $8 donors. Compute the lifetime value of each segment.”

Terpstra advises to be sure to pay special attention to first-time donors. They may be testing a new relationship with you. It’s up to you to make them feel a part of your family. He says, “First-time donors should always be made to feel special. They deserve more of a welcome message, and should be sent more information about the organization. Better yet, send new donors a welcome kit to let them know more about your organization and give them more opportunities to give you feedback regarding why they gave. Include other ways the donor can communicate with you (Web, e-mail, call-in number). The more you can stay connected to new donors, the better.”

Building an early relationship is key. Johanna Antes, director of support for the RTN Family Stations, a group of
Christian broadcasters, really makes her first-time donors feel at home. “First-time donors of any amount receive a thank-you phone call from one of our on-air announcers. Our donors are positively shocked when they get a call. They hear these people on the radio every day, so they are excited to hear them on the phone.” There may be a lesson for all of us here. You may not have a radio personality as part of your team, but a call from a staff member to a new donor might help your organization stand out.

“Thanks” and “Please” in the Same Letter?

Should you ask for another gift as part of a thank-you? This is where my experts disagree.

Ken Burnett says, “No. Never. That’s not a thank-you, that’s a further solicitation. Though many won’t say so, most will be offended.”

Warwick agrees, “No!! Research among donors shows no matter how lucrative this might be, it’s counterproductive. Our job is to recruit and cultivate donors for the long term. Asking for gifts in thank-you’s is an immediate turn-off to many donors.”

But Tim Burgess, president of The Domain Group of Seattle, takes the opposite view. “Absolutely. Giving donors the opportunity to give again is a great service to the donor. Remember, the donor made a well-founded decision to give because they wanted to give. They are emotionally bonded to your organization.”

Many nonprofits take a middle ground. Terpstra reports, “Recognize their generosity, but also let them know the need is still great and an “additional gift” would be helpful. The gift ask in the acknowledgement should be softer. Add a reply envelope or a wallet flap envelope with some standard gift asks on the flap if you are not comfortable including an “extra gift” reply form in your acknowledgment.”

Does saying “thank-you” and “please” at the same time pay off? Organizations report that as much as 15% of their donor income can be tracked back to a request made when acknowledging a gift.

Continued on Page 18
Besides building relationships and fundraising, acknowledgements serve an administrative purpose, too. The Internal Revenue Service (IRS) requires that 501(c)(3) organizations must inform donors in writing of the value of their charitable contribution for all gifts of $75 or more when the donor receives a substantial premium or benefit in exchange for a contribution. The IRS has explicit guidelines that explain when an item, like a keychain, is not substantial, and doesn’t need to be reported. These figures are adjusted each year for inflation.

And donors who make a gift of $250 or more, regardless of a premium, must obtain a written document from the charity either on paper or via e-mail, to qualify for a tax deduction. Charities are not required to acknowledge high-end gifts unless the donor requests them, but it has become common practice because it just makes sense.

The IRS wants any written thank-you to contain:

- The donor’s name
- The name of the organization
- The amount of the contribution
• A description (but not the value) of a non-cash contribution

• A statement explaining whether the nonprofit provided any goods or services in return for the gift. If no goods or services were provided, this must be stated

* A description and good-faith estimate of the value of any goods or services provided in exchange for the gift

Some charities send a thank-you after every gift. If you wait for a year-end wrap-up, get them out as quickly as possible. Remember that the donor must receive the document by the earlier of: the date on which the donor files her tax return for the year in which the gift was made, or the due date of the tax return including extensions.

Acknowledge significant gifts in a first-class letter. That’s just good fundraising practice.

The bottom line: Design an acknowledgement piece that fits the style and mission of your organization. Using an attractive envelope, receipt, and thank-you letter that affirms the donor’s relationship to your organization is a must. If you do decide to ask for a gift, make sure you have a well-designed reply device, and include a reply envelope. Do your homework to ensure you are meeting IRS and USPS regulations. But, most of all, respond quickly! It’s the mannerly thing to do.

Tom Hurley is president of the not-for-profit division of DMW Worldwide. DMW Worldwide is a full-service direct response advertising agency with offices in Wayne, PA; St. Louis, MO; and Plymouth, MA. You can reach Tom at 774.773.1200 or thurley@dmwdirect.com.
As reported in the last issue of the Journal, (September 2005, Vol. 8, Issue 3) a small group of nonprofits and companies joined in a new DMANF Leadership Summit in Denver, Colorado this past June to hone in on a single challenge. The group was selected for their expertise and length of service in the fundraising community to ensure that all attendees had senior-level experience. It was highly interactive and intensive.

The conference was developed and led by Phyllis Freedman and Mindy Gumb.

The goal was to bring together a small group of top nonprofit direct marketing leaders from around the country for a strategic discussion on one single topic, what is known as the Holy Grail for direct marketers, the concept of a true constituent focus as a core business strategy across organizations.

**A CRM Gold Standard**

The first conclusion reached at the Denver Leadership Summit was that leaders need to take the next step to identify how to move valuable programs ahead to align with what constituents are expecting – a new gold standard of Customer Relationship Management (CRM). As direct marketers, we all have hopes, dreams, and good intentions about fully integrating constituent relationship management into our programs and organizations; we are all committed to this idea. We all believe it is absolutely the correct thing to do. Yet, few of us are able to make progress in this area.

Our previous article focused on the first two topics addressed at the Summit: Integrated Communications and Organizational Change. Following are conclusions drawn by the group regarding one of our greatest challenges - working with our organizations’ CFOs on financial matters. Clearly, there is a great deal of work to be done in this area.

**3. Bending the Financial Mindset**

Problem: Turning thoughts to the return on investment (ROI). As marketers, how many of us are measured by how much revenue our direct marketing (DM) appeals bring in? What about the constituent who started in the DM program, and grew through a series of upgrade plans, then ultimately upgraded to a major gift program, and gave a huge gift? What about the constituent who started in DM, then was taken over by a major gift officer who

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thought this donor had potential, but then caused revenue loss in DM? What about the little $10 donor who has been giving for 20 years and then left a $5mm legacy? How can we as direct marketers help make better decisions on how to spend our valuable dollars?

We live in a world driven by internal metrics of internally evaluated programs. How can we begin to migrate into a more robust ROI evaluation, and how might we present that case in an objective manner? Following is some sage advice garnered at the Summit:

• Be creative when seeking approval from management. While management buy-in is essential, it does not have to be from the CEO. Start with educating your CFO and finance team about the impact of DM in other areas of the organization, and share your insights about how the “organizational” value of a DM donor would look if other sources of revenue were taken into consideration. Depending on your organization, you might want to start with the controller, not the CFO, and refine your “pitch” before you set your sights on the CFO.
• Be extremely well prepared and armed with information before tackling your CFO and finance team. Have examples of donors who started in DM and graduated to other levels of giving in the organization; bring factual data analysis to the table.
• Conduct learning labs and pilots to better demonstrate the impact of DM donors throughout your organization. Data can tell the story explicitly and help develop thinking about a more robust ROI model.
• Think of integrated metrics, not just in fundraising terms. A fully developed model would consider multi-channel impacts, multi-program impacts, and DM impacts on other department programs.

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(non-fundraising departments). This should be viewed in multiple ways: Are they giving through other means in the organization, are they using services from other areas in the organization, and are they volunteering for other areas in the organization?

- Conduct benchmarking and analysis to understand the interplay between channels, touch points, lifecycles, services, volunteerism, and giving.

**The next Leadership Summit will take place June 13 & 14, in Tucson, Arizona. If you are a senior-level fundraiser and wish to be on the invitation list, please e-mail Helen Lee at Hlee@the-dma.org.**

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**NONPROFIT Q & A**

**Question:** When is the best time to send an e-newsletter?

**Answer:** Below are a couple of strategies to determine the optimal time to send an e-newsletter:

- Survey your subscribers via email as to what time of the day they would most like to receive emails – and give them a half dozen time periods to choose from. Then send emails to the responding subscribers based on their preferences.

- Assuming you have an opt-in form on your Web site, allow the subscribers to select the time period they’d like to receive emails when then subscribe.

- Conduct a mini focus group by contacting a dozen of your subscribers and finding out what time they’d like to receive emails. Use these conversations to also learn what types of information and format would be most valuable and preferred.

- Test. The best method is always to conduct split tests. Segment your list into equal random groups and email the identical message to each segment at key time periods (keeping in mind differences by time zone).

- Consider segmenting based on time zone. Since it sounds like you have their mailing addresses, segment your list according to their state/zip code and corresponding time zones. When you’ve determined optimum mailing times this ensures that your message reaches subscribers across the country all at the same local time period.

**Provided by:** EmailLabs - Tel: 866.362.4522 - Web: www.EmailLabs.com
Good morning! It’s my pleasure to welcome you all to this year’s New York Nonprofit Conference. And I want to extend my thanks to our co-chairs Dick McPherson and Beth Athanassiades for all of their time and effort that have made this event happen. They’ve worked with our great staff to assemble an impressive two days of sessions and speakers, and to ensure that – by the end of tomorrow – you’ll leave here with fresh ideas about how you can make direct marketing work harder to reach your current and prospective donors, and to deliver results for the important causes your organizations represent.

DMA is proud to support the work of our Nonprofit Federation that makes specialized events such as this one possible. Because, while the basic principles of direct marketing remain the same for us all, the needs and goals of direct marketing practitioners – from one industry segment to the next – vary considerably, and this is certainly the case for those in the nonprofit arena.

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From charitable nonprofits reaching out to donors, to nonprofit associations and organizations working with their members, DMA is committed to all of our Nonprofit Federation’s members. And we’re committed to you, not only as fellow practitioners of direct marketing, but also because the ultimate goals of your organizations are so important to all of us and our society.

Charitable giving and fundraising are essential elements of our country and help define what it is to be an American. In this relatively young country of immigrants, we’re known for hard work and the pursuit of the American dream – but giving back is no less a part of what makes us Americans. At every level of society, Americans are marked by their capacity to share what their hard work has brought them – and our history is filled with examples.

One need look no further than the generosity demonstrated in response to the Southeast Asian tsunami. The donations from average Americans are a clear example of how charitable giving is deeply ingrained in who we are. One organization reported receiving over $10 million in one week from generous contributors for the tsunami victims. And this is just one of the examples of how organizations energized and challenged Americans to give in a very short time frame.

Of course, speaking of the tsunami relief efforts, while our country’s response was exemplary, we were certainly not alone. Numerous countries around the world rose to the occasion, giving generously to help those in need.

I know some of you are involved in international efforts to raise funds for.
your organizations. I hope you’ll have a chance tomorrow to hear the international fundraising director of UNICEF, Per Stenbeck, who has traveled here all the way from Switzerland to give you his insights into the tsunami fundraising efforts of UNICEF, and how his experiences may help you.

Of course, whether you’re involved in international or local fundraising efforts, one of the most important tools there is to help you tap the world’s great generosity is direct marketing.

In the US alone last year, the nonprofit sector raised $187 billion via direct marketing techniques. DMA and all of its members are extremely proud of this accomplishment. Helping you help your causes benefits all of us in the end.

But while America’s – and the world’s – generosity remain unchanged, much about being a nonprofit in this age has changed. You’re learning to do more with less, and effective fundraising through direct marketing is key to your success.

Finding the best ways to reach out to donors is a never-ending learning process. The trend toward multichannel marketing has dramatically refined effective fundraising – and it’s made it more important than ever to find effective strategies for carrying out your organization’s vision. And, of course, today’s nonprofits are also faced with the shifting political and economic landscapes, which endlessly present new challenges – from postal rates to charitable registration issues to data security.

In this ever-changing environment, DMA is here to help you deal with political and economic changes, and the evolving perspectives and demands of your donors – as we’ve done for years. As you all know, there is strength in unity in these pursuits. So, I am delighted to see the many DMANF members here. To the non-members in the crowd, I would ask you to join us in our critical work. You benefit from the good work we do, so please help us help your causes.

It is through events like this one that we’re especially pleased to help you continue to find new ways that integrated marketing can carry out your mission by reaching current and prospective donors more effectively than ever.

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Remarks before the 2005 New York Nonprofit Conference

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In closing, I want to personally applaud you in your efforts to make our world better in so many ways with limited resources. It is an important task for us to represent, promote, and enable nonprofits to fulfill their fundraising efforts through advocacy, image/branding, research, and educational and networking events.

We remain committed to you, and are proud and honored to serve you.
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The 2005 New York Nonprofit Conference
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By carefully planning and implementing a few basic measures, any organization can meet the demands of sudden Web site traffic increases when an unexpected disaster or crisis situation strikes.

**Coordination**

Keeping lines of communication open, and empowering people to act immediately are key to responding swiftly to any situation.

- Designate a response team that can spring into action in case of a crisis situation.
- Create a list of each member’s responsibilities and cell phone numbers, and make sure everyone has an up-to-date copy.
- Include contacts for key vendors.
- Empower people to take swift and unilateral action when needed.

**Site Optimization**

When an organization experiences a large spike in Web traffic after a crisis or other event, the additional site visitors that you depend on to keep your sites up and running smoothly.

- Keep those vendors apprised of any situation that might cause extra Web site traffic.
- Work with them to manage the increased demands on their systems.

**Collaboration with Vendors**

- Stay in touch with service providers that you depend on to keep your sites up and running smoothly.

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**Direct Marketing Pointers**

**Preparing for Spikes in Web Traffic Caused by Unexpected Events**

David Crooke, Founder and Chief Technology Officer, Convio

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**What we call results are beginnings.**

— Ralph Waldo Emerson

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University of Kentucky Alumni Association
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10 Years – Joined in 1995
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The Leukemia & Lymphoma Society
Juvenile Diabetes Research Foundation

15 Years – Joined in 1990
Ducks Unlimited
Union Privilege
Washington University

20 Years – Joined in 1985
American Institute for Cancer Research

25 Years – Joined in 1980
American Assn. of Individual Investors
Winterthur Museum & Gardens
The American Legion Natl. Headquarters

30 Years – Joined in 1975
North Shore Animal League America
Guideposts

40 Years – Joined in 1965
Association of Marian Helpers

Longest DMA Nonprofit Member
58 Years – Joined in 1947
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Thank you for your support and membership!
typically are at the Web site for a specific purpose: To get more information about the situation, and/or to make a donation.

To optimize your Web site to respond accordingly:

• Put a prominent link on the homepage to the donation form related to the crisis or event.
• Trim down Web content to allow it to load faster. In particular, reduce the number, size, and quality of graphic images, and remove multimedia content from the homepage and donation pages.
• Temporarily suspend personalized content. Replace dynamic pages with static HTML files.
• Re-allocate server capacity as appropriate, and suspend non-time-critical activities such as batch processing of data to a time when Web site resources are less taxed.

**Fallback Plans**

Even if an organization follows the suggestions above, its Web traffic still can be overwhelming following a disaster. Following are fallback measures that can be executed quickly to avoid page errors and other Web site issues.

• Create a very basic form to collect e-mail addresses for times when site capacity to process donations is overwhelmed. Follow up by e-mailing those people in quieter periods to ask them for donations.
• Establish a contingency donation process through another site that will host secure payment forms, such as Network for Good, IATS, or PayPal.
• Provide resources to enable people to donate offline. For example, offer a PDF form that can be printed, filled out, and faxed or mailed.

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**David Crooke** is the founder and chief technology officer of Convio, Inc. He can be reached at 512.652.2600 or [www.convio.com](http://www.convio.com).
There are many ways to measure the performance of a donor program. Gross and net revenue, the number of active donors, and their corresponding lifetime values are all important. However, the statistics associated with increasing donor attrition, if ignored, will rob a new program of needed growth, and put a mature program on a plateau. Fresh, new donors must pick up the baton from those supporters who fall by the wayside.

Worse yet, if an organization suffers high attrition, two temporary effects may actually appear to be good news. Average gifts can rise and net revenue can increase as loyal donors continue to give at increased rates even as the donor file continues to shrink.

A recent benchmarking study by Target Analysis Group of Cambridge, MA, confirmed this trend. Thirty-seven national fundraising organizations who raised more than $1 billion in 2003 from 25 million donors reported revenue up 2.8%, while the total number of donors dropped by .07% last year, and 2.2% the year before. To be fair, the downward trend appears to be reversing. But, what of an organization that has fewer donors today than last year, and the year before? Could it become extinct through donor attrition?

Heed Consistent Advice

I put this Doomsday scenario before a group of fundraising professionals who work with a wide variety of donor-based organizations. And because each of us has a slightly different view from our own trench, I got a lot of different opinions – but some consistent advice.

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Donor Attrition...
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Some view the situation as a natural evolution in the industry. Jim Kirschner of Miles River Direct works with membership organizations, and says, “I think this trend has been going on for quite a few years, but it is an economic decision on the part of the fundraiser, not a trend for the donors. Fundraisers are hard pressed to earn net dollars from low-dollar donors, so they’ve switched tactics to acquire and maintain higher-dollar donors.”

John W. Graham, who consults for a number of religious groups, points to the continuing tension between servicing existing donors and acquiring new ones. Development directors are cutting back on acquisition efforts because of the time it takes for the investment in a new member to pay off. According to Graham, “For a good while, it took just 10 to 12 months to recoup the donor acquisition cost. Now, it takes 18 months to recoup the out-of-pocket costs to break even on a new donor.”

Mal Warwick of Mall Warwick and Associates put the issue in Darwinian terms: “There are fewer donors on file today only because some nonprofits are unwilling to pay the higher donor acquisition costs necessary in today’s competitive marketplace.”

So, is it inevitable that every organization face a lifecycle of growing, maturing, shrinking, and then dying? Hardly.

Keep At It

Every fundraiser in my little group agrees that a successful organization must always continue to seek new donors. Accept the fact that the days of 2% and $20 average gifts for new donors, or a 1% and $40 average gift for members, went the way of a $1 gallon of gas (or maybe even a $2 gallon)! If you realize net revenue from a contributor in a reasonable amount of time, say 18 months to 2 years, keep at it.

Then develop and nurture the relationship through demonstrating great stewardship and effective communications. Successful organizations of all sizes today know they need to:

- Acquire renewable donors. Simply adding new low-dollar donors who are not committed to the cause won’t pay off in the long run. Understand how to compute the lifetime value of a donor, and then invest in your most loyal donors.

- Keep supporters active. Whether it’s a donor-based or an annual membership program, don’t give up on the relationship until it’s more costly to renew the contributor than to find a new one. Kirschner says for the long-term success of a membership organization, he finds the renewal rate to be most important. For donor organizations, frequency and retention top the list.

- Reactivate lapsed members. Kelley Hamilton of Detroit Public Television has turned to her inactive file to bring in “new” members. For local or regional organizations who can’t

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simply expand their geography, reactivating a past contributor is usually more cost-effective than finding a new one. A number of data service firms offer new ways to “mine” productive names from lapsed donor files.

Develop new relationships with donors. Graham has had great success in converting donors to members. Donors who had been giving twice per year increased their giving to 6-8 times per year when invited to join the organization as a participating member.

Offer automatic monthly giving. The financial sting of acquiring new donors doesn’t feel so bad when 90% or more of your monthly donors stay with you year after year. Invite new donors to make continuing gifts by automatic debits to checking or credit card accounts, and you’ve developed a relationship that’s worth the investment.

Seek New Friends

No matter the size of your file, always remember that these gifts come from individuals who seek a relationship with you. Stemming donor attrition and improving other performance metrics are only part of the picture. Americans make up the most generous society in the world. The largest planned gift you will ever receive may come from the next prospect that gives you $22. Keep seeking new friends.

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Tom Hurley is president of the not-for-profit division of DMW Worldwide. DMW Worldwide is a full-service direct response advertising agency with offices in Wayne, PA; St. Louis, MO; and Plymouth, MA. You can reach Tom at 774.773.1200 or thurley@dmwdirect.com.

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Don’t forget about the Members Only area of our Web site, which includes a new section on research & statistics and a member list.

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