DMFA DIRECT MARKETING FUNDRAISERS ASSOCIATION

SUMMER 2025 NEWSLETTER

Monthly Giving Is No Longer Optional—It's Your Resilience Strategy

Jackie Libby, Avalon Consulting

In this economy, donor volatility is the norm. Campaign performance is unpredictable. Acquisition costs are rising. And executive teams are asking for revenue projections with zero margin for error.

In that environment, monthly donors aren't just a nice-to-have. They're your organization's **resilience strategy**.

Sustainers Aren't Just Revenue—They're Infrastructure

Let's move past the baseline "monthly giving is important" messaging. We're in a different moment now.

Organizations that invest in sustainers aren't just seeing more stable revenue—they're making better strategic decisions. Sustainers allow you to budget more confidently, test more boldly, and prioritize long-term growth over campaign-to-campaign survival.

Sustainers don't just improve the numbers. **They change the culture.**

From Campaign Thinking to Capacity Thinking

Building a successful sustainer program requires reengineering how your organization thinks about time, value, and risk. That means investing differently in acquisition, prioritizing donor lifetime value over immediate campaign returns. It means elevating retention from an afterthought to a front-line enterprise goal. And it means upgrading internal systems so they can support the complexity and continuity of a recurring gift program.

These changes shift your entire operating rhythm. You stop tracking ROI in narrow windows and start evaluating success over 12 to 24 months. You move from reactionary spending to strategic resource allocation. And you give every department—from donor services to finance—a reason to prioritize sustainability alongside performance.

Strategic Questions Nonprofits Must Start Asking

Organizations that lead with a sustainer mindset are asking different questions in the boardroom and in the planning process. They're asking how much of their acquisition budget should be focused on recurring donors—not just one-time givers. They're looking at whether their annual appeals are supporting sustainer conversion opportunities or missing them entirely. And they're asking tough—but necessary—questions about whether short-term acquisition gains are worth the long-term churn they sometimes bring.

Equally important, they're examining whether their internal systems are built to support sustainers or merely tolerate them. And whether their executive teams and boards truly understand the long-term value of a monthly donor—or are still chasing year-over-year campaign lifts at the expense of durable growth.

These questions signal not just a tactical shift, but a strategic evolution.

Organizations with Strong Sustainer Programs Are Winning

Organizations with well-developed monthly giving programs are outperforming their peers—not just in revenue stability, but in how they operate.

They have more consistent net income and fewer crisis cycles. They achieve stronger long-term ROI from acquisition spend. They plan and innovate from a place of security, not survival. They offer donors a more cohesive brand experience rooted in continuity, not urgency. And most importantly, they build relationships grounded in trust and shared purpose.

When a donor gives monthly, they're making a profound statement: *I believe in your future*. Your sustainer strategy should reflect that same conviction.

Design for Durability

Monthly giving is no longer a trend or tactic. It's the foundation of modern fundraising—and a litmus test for how future-ready your development strategy really is. Because in today's fundraising environment, continuity isn't just a benefit. It's a competitive advantage.

Message *from* *the* President

Dear Friends and Fellow DMFA Members,

It has been a busy time at the DMFA! I am thrilled to bring you up to date with the latest happenings, and let you know a little about what's ahead.

We hosted our 3rd Annual Mid-Level Giving Benchmarking Summit in April. It was a successful event that included 10 participating sponsors, 43 non-profit organizations, and more than 90 registered participants who gathered over two days to share best practices, opportunities, trends, and insights to enhance mid-level programs. Over three years, this summit has quickly become one of the DMFA's signature events, and plans are already underway for 2026!

Summer began with the 2025 DMFA Awards Celebration and Annual Membership Meeting on June 5th. Congratulations to all the winners! If you weren't able to attend, the awardees can be found on our website at **dmfa.org**. It was also a pleasure to welcome our newest board members: Diana Lee, Jennifer Minogue, and Jeff Thomas. We are excited by the valuable talent, energy, and experience they will bring to the DMFA.

While our industry continues to navigate uncertain times, the DMFA will remain a steadfast resource for knowledge and connections in the months ahead. This summer's newsletter is focused on sustainer giving, providing best practices and insights about the growing necessity for strong sustainer programs. Recognizing the need to foster collaboration between members and industry leaders around this topic, we have officially launched our Sustainer Group, marking a significant milestone for the DMFA. The Sustainer Group is a dedicated community of professionals who engage in interactive discussions, exchange ideas, and work together to shape the future of monthly giving strategies. Please see page 3 for information about joining this beneficial group. You also will not want to miss the article from TNPA on page 15 that provides useful guidance for adapting best practices for sustainer programs to meet changing regulations.

As you may know, June is the end of our program year, but we already have several things coming up to keep you informed and engaged, including *Direct Response 101—A Two-Day Virtual Masterclass* on July 15th and 17th. For more events you won't want to miss, please visit **dmfa.org/events**.

Finally, I wanted to say what an honor it has been to serve as your President. I am humbled to have been entrusted to lead this great organization over the past two years. Thanks to the amazing support of our board, sponsors, members, and volunteers, we have continued to move the DMFA forward, and I hope you are as enthusiastic about its future as I am.

With summer's longer days offering more time to enjoy the season, I hope you are able to spend some time away with family and friends. I look forward to seeing you at an upcoming event.

Best,

Kristen Shank Finn
President, DMFA

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This newsletter is printed on recycled paper.

Interested in joining the DMFA? Log on to www.dmfa.org or call 646-675-7314.

Introducing the DMFA Sustainer Group

The DMFA is thrilled to announce the official launch of our Sustainer Group—a dedicated community of professionals driving innovation and impact in recurring giving. This marks a significant milestone in our commitment to fostering collaboration among members and industry leaders.

Our second event, held virtually on May 13, 2025, brought together experts in the field from across the nonprofit sector for a dynamic two-hour session. Attendees engaged in interactive strategy discussions, explored insightful case studies, and exchanged ideas to strengthen and grow their sustainer programs.

This session focused on a critical topic for program growth: **sources of sustainer acquisition and conversion**. Helen Robare, Associate Director, Digital Acquisition & Innovation at The Nature Conservancy, and Alejandra Gerosa, Associate Director, Sustainer Marketing at the ACLU, shared real-world examples, tested approaches, and key learnings from their organizations on how to best acquire and convert supporters into sustainers.

The gathering provided a unique opportunity for Sustainer Group Members to connect, share experiences, and collectively shape the future of monthly giving strategies. The collaborative environment fostered meaningful conversations and actionable takeaways, setting the stage for an exciting year ahead.

To participate in future Sustainer Group events, DMFA members must have an active sustainer program with over 1,000 donors and add the Sustainer Group Benefit to their membership. For more information or to join, please contact us at **info@dmfa.org**.

We're excited to grow this community of experts and changemakers, elevating the conversation and impact of sustainer fundraising together.

Sustainer Group Volunteer Advisory Committee

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- Helen Robare, *Associate Director, Digital Acquisition & Innovation,* **The Nature Conservancy**
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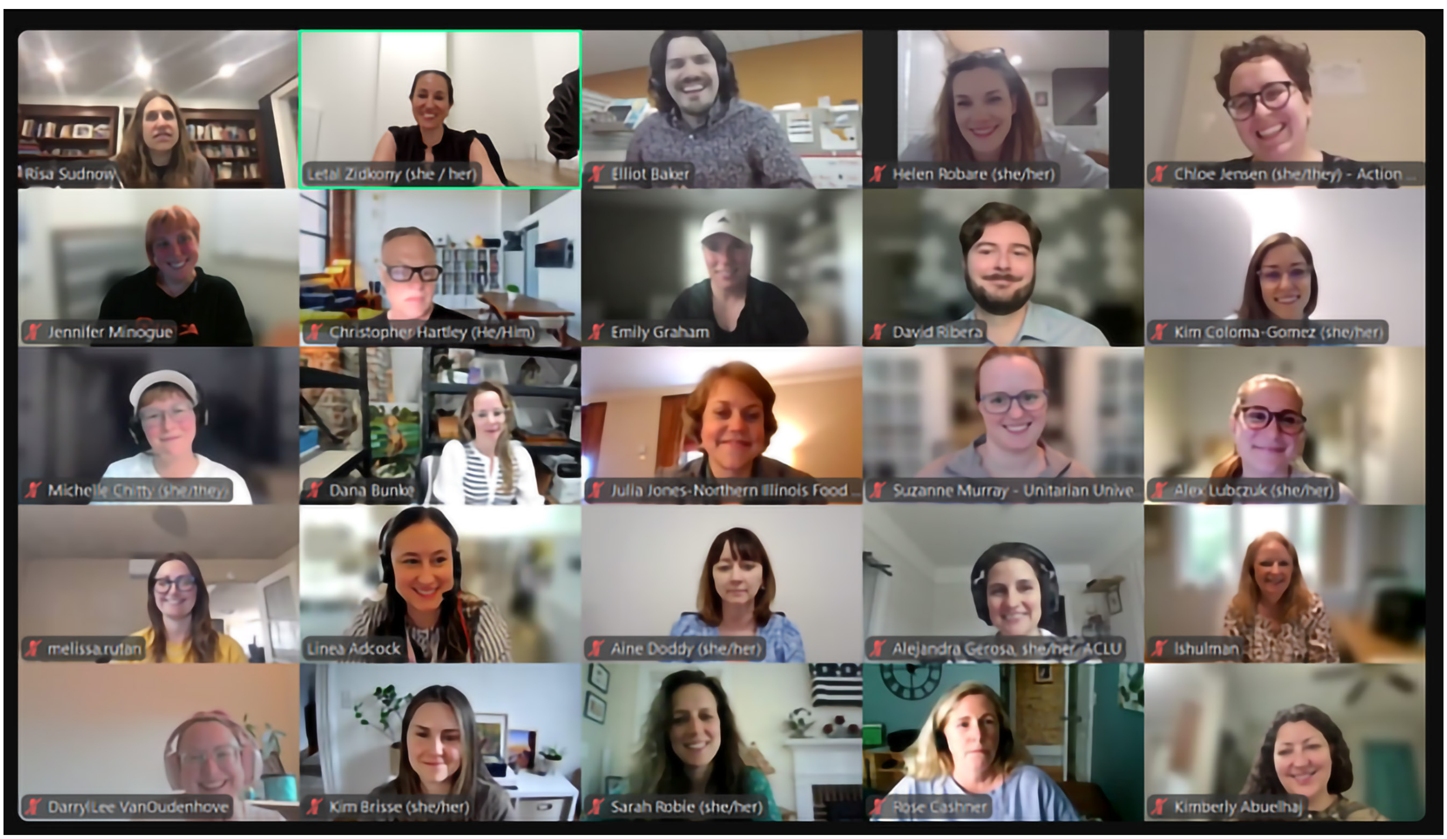


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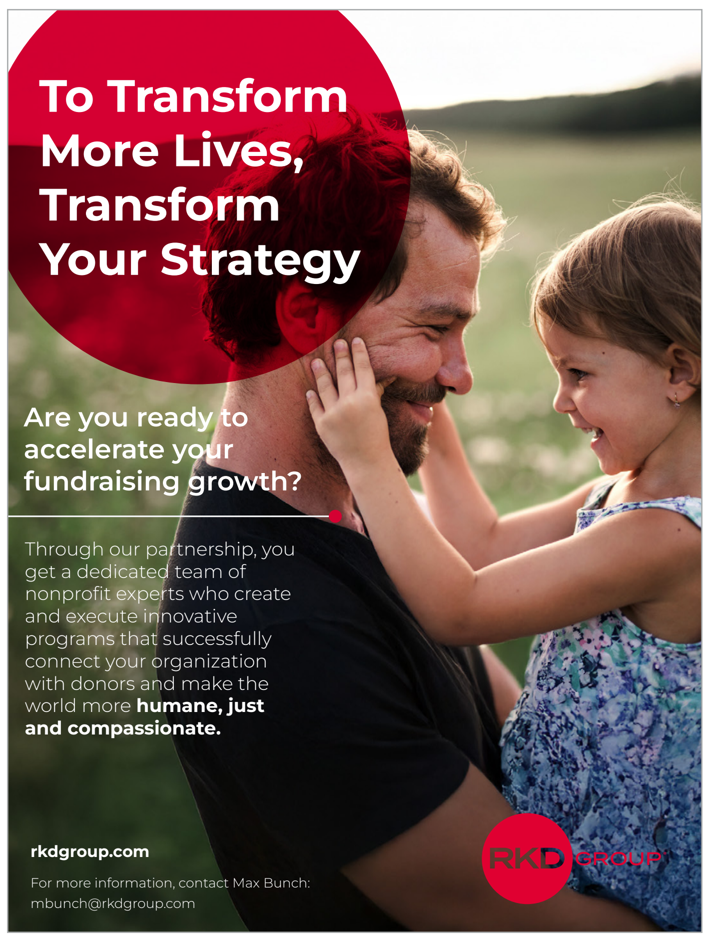
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Monthly Magic:
5 Ways to Make Sustainers Your Fundraising Superpower

Meghan Thorne, The Lukens Company

One-time gifts? Love 'em.

Monthly gifts? *Absolute game-changer.*

If your nonprofit still sees monthly giving as a "nice-to-have," it's time to level up. Sustainer programs go beyond convenience; they're transformational. In fact, they might be the most powerful tool in your fundraising toolbox right now.

In a year when one-time donor revenue dropped 5%, sustainers quietly showed up, increasing revenue by 6% and making up a whopping 31% of all digital fundraising dollars. Better yet, the average annualized gift per sustainer was $288. That's not pocket change; that's dependable, mission-fueling, budget-stabilizing impact.

And here's the thing: monthly giving fits perfectly into how people live and give today. From streaming platforms and meal kits to meditation apps and coffee subscriptions, people are used to signing up once and supporting what they love without having to think twice. So, why not make it just as easy to support a cause they believe in?

Sustainers are your loyalists. Your inner circle. They're not just giving—they're invested. So how do you grow your monthly giving program into the reliable revenue stream your mission deserves?

Here are 5 actionable ways you can transform your sustainer program into your nonprofit's fundraising superhero.

1. **Name It, Frame It, Claim It:** A branded monthly giving program isn't just a nice touch; it's a conversion tool. Giving your program a unique name creates a sense of community and identity. "The Impact Circle," "Champions for Change," or "Hope Monthly"—whatever fits your mission and tone—makes donors feel like they're part of something special. And when people feel like they belong, they're more likely to give ... and stay.

2. **Make Monthly the Default:** Don't bury the option. Put it front and center! Make "monthly" the pre-selected option on your donation form. When monthly giving is the default selection on your donation form, it becomes the norm. It's a subtle nudge that helps shift behavior and boosts conversions. You're not being pushy—you're removing friction. And today's top donation platforms make this simple to implement.

3. **Add a Little Perk:** Don't worry, you don't need to hand out tote bags like Halloween candy. Even a small perk—early access to updates, a sneak peek at behind-the-scenes stories, or an exclusive quarterly email—goes a long way without straining your team or breaking the bank.

4. **Show Up, Consistently:** Monthly giving deserves monthly gratitude. Recognize your sustainers with regular, heartfelt touches. Create a dedicated email stream. Celebrate their "giving anniversary." Or surprise them with a once-a-year handwritten note. It's not about the grand gesture. It's about showing up with intention.

5. **Test, Track, Repeat:** Small tweaks can lead to big results. Try testing your monthly ask language, donation form layout, or thank-you flow. Use A/B testing to find your winning formula. Watch KPIs like retention rate, upgrade rate, and lifetime value. Then double down on what's working.

Here's the bottom line: In times of economic uncertainty and fundraising curve balls, recurring giving isn't just smart; it's strategic. It's reliable, scalable, and can fuel your mission year-round.

So go ahead. Make the ask. Build the club. Send the emails. Your future self (and your fundraising forecast) will thank you.

The Power of Predictable Giving:

Five Proven Strategies to Strengthen Your Monthly Giving Program

Louise Moore, Huntsinger & Jeffer, Inc.

MONTHLY GIVING IS GROWING—AND SO IS ITS IMPACT.

In 2023, one-time donor revenue declined by 5%. In contrast, monthly giving increased by 6% and represented 31% of all digital fundraising revenue, with an average annual gift of $288 per sustainer.

As subscription models become the norm—Amazon Prime, Netflix, Spotify—monthly giving aligns naturally with the way people spend and support. For nonprofits, it delivers consistent, mission-sustaining income and supports long-term planning.

But a recurring giving program is not a "set-it-and-forget-it" strategy. It requires thoughtful planning, strong infrastructure, and active donor stewardship.

Here are five proven strategies to help you grow and maintain a healthy, high-performing sustainer program:

1) MAKE ENROLLMENT SIMPLE AND SEAMLESS

Avoid complex donation forms that deter participation. Add QR codes to printed materials and a clear "Make It Monthly" option online. Allow one-click conversions from one-time to recurring gifts. Accept multiple payment types (credit cards, PayPal, ACH, ApplePay), and offer suggested monthly amounts—starting around $19—to reduce friction.

2) OFFER FLEXIBLE GIVING OPTIONS

Monthly giving isn't the right fit for every donor. Consider offering bi-monthly, quarterly, or annual recurring options to accommodate a wider range of financial preferences. Ensure your platform supports multiple giving frequencies and payment types. Remember: 1 in 5 donors will abandon a gift if their preferred payment method isn't available.

3) PROACTIVELY MANAGE PAYMENT DECLINES

Establish a clear internal process for handling failed transactions and expiring credit cards. Use tools like Raiser's Edge Credit Card Updater or similar services to automate updates and reduce attrition. Assign staff responsibility to track and follow up on declines—don't assume it's being handled.

4) ENGAGE AND STEWARD SUSTAINERS INTENTIONALLY

Sustainers are your most loyal donors—treat them that way.

Regularly share updates on the impact of their ongoing support. Go beyond generic acknowledgments. Send occasional handwritten notes, personalized thank-you gifts, or exclusive updates that show how their monthly gifts are making a difference.

5) LEVERAGE YOUR DATA TO OPTIMIZE AND GROW

Use your CRM to identify opportunities.

Look for donors who give multiple times per year but aren't enrolled in recurring giving—invite them to join. Monitor key performance indicators like total sustainers, average monthly gift, and cumulative annual giving. Set realistic goals based on trends to drive smart, strategic growth.

Recurring donors do more than sustain your organization—they fuel its future. By focusing on simplicity, flexibility, stewardship, and data, you can build a monthly giving program that delivers long-term, reliable support for your mission.

> Monthly giving aligns naturally with the way people spend and support

FUEL YOUR MISSION WITH MONTHLY GIVING:
Top Tips to Maximize Sustained Giving

Mathew Harkins, The Engage Group

Sustainers are the backbone of your program's revenue. That part is easy to understand if you've seen the numbers. The question then is: how do you get them? How do you encourage sustained giving from one-time donors and your prospects? How do you convince people to take this action without getting too aggressive? Luckily there are myriad ways to go about this—enough for you to try some now, test them, and continue tweaking your sustainer program for campaigns to come. Here's where we've seen success:

- Segment your repeat donors and direct sustainer messaging and offers to them. If someone is giving repeatedly during the year on their own, there's a good chance they'll appreciate being noticed and offered the convenience of sustained giving. This allows both recognition, cultivation, and a unique ask for your sustainer program.
- Implement a sustainer upsell on your donation form. These pop-ups appear after a supporter has clicked to donate a 1x gift asking if they would like to convert to a smaller monthly gift. If they select "No" or do nothing, the 1x gift processes, but if they say yes then you have converted a new sustainer.
- Share the impact of sustained giving. This can be storytelling about how you are able to allocate resources thanks to monthly giving, or it can be offering your sustainers the tools to share that they've made this gift (or both!) People like to tell and be told stories—encourage this on both ends of the program.
- Encourage donors. Those arrows on donation forms that point to the amount you want to encourage? Or that point to the monthly recurrence? They are very easy to deploy in most scenarios, and it's one more variation on asking.
- Treat your sustainers. They're giving to you monthly; you can give them something back. It may be a sustainer-only premium. It may be a low-to-no-cost perk (e.g. special phone wallpaper). It may even just be a "membership" title (recognition can sometimes be the most effective perk).
- Stick with it. A single effort may not get the job done right away. You'll need to invest time, effort, and some money to make this work.
- Show them how and tell them why it makes an impact. You can indicate the gift that most supporters are giving or just point out the monthly option.
- Sustainer upgrades? Yes please. Don't rush on this one. Be thankful, be grateful, and be patient. Make a plan to ask your sustainers to upgrade their gift. $1, $3, $5; and make it easy. Use your eCRM and/or email marketing platform to autofill as much of the saved user data that you have—maybe even the amount—so your sustainer only needs to hit a single "Yes, Upgrade My Gift" button to complete the upgrade.

There is room to grow, and there are a lot of ways to facilitate sustainer growth. Create a checklist and a plan and then map out how you can test these various efforts. It doesn't hurt to try, so get started now. Monthly gifts await.

Why Monthly Sustainers *Are the Key To Surviving Today's Fundraising Crisis*

Roger Hiyama, Wiland

Changing Landscape

The fundraising landscape is changing in dramatic ways, particularly in comparison to the COVID-19 surge years of 2020 and 2021. Gone are the days when new donor acquisition numbers were surging and house files were growing. Add in the up to 11% increase in postage this July, and nonprofits are struggling to manage the reach of their fundraising programs, as most will be forced to reduce mail volume by up to 5% in their acquisition and donor appeal programs.

Key data points from 2024 industry benchmarks have revealed a few alarming trends. Donor house files are shrinking by 6% to 8% year-over-year, representing the second consecutive year of declines. In some sectors, the loss of donors is approaching 10%.

In addition, lower-dollar donors, those giving less than $25, have declined by nearly 10% year-over-year. Does that mean that lower-dollar donors stopped giving? Or have the cost structures of fundraising made it so difficult to generate net revenue that nonprofits have started dropping them from their appeal programs. They have most certainly excluded them purposefully from their acquisition programs.

Resiliency and Fundraising Control Knobs and Levers

It's definitely a challenging time, as in most cases, you are still being asked to increase revenues despite a declining active donor file. But, we're used to doing more with less, right? It's the resiliency of the trade!

Don't despair because it's not all bad news. In fact, overall revenues from $500+ donors increased by 7.9% last year, which provided an out-sized impact on overall fundraising revenues. 2024 showed an overall increase of 3.2%! Therefore, you'll need to continue focusing your efforts on mid-level and major donor programs for the top 3% to 5% of your donor file.

I often think of a direct response fundraising professional as being like a heavy machinery operator—perched high in a crane, overseeing the entire job site. You've got big levers and controls at your fingertips: maybe a massive dump truck to handle the heavy lifting, and a backhoe or small tractor for the more precise work.

When it comes to growing net revenue from your existing donor file, the fundamental levers you can pull are fairly straightforward:

1. Increase gift frequency
2. Increase gift or donor value
3. Decrease contact frequency or marketing spend
4. Reactivate lapsed donors or add new donors to replace your losses

The real challenge—and opportunity—lies in how you operate these levers. The strategies you choose will determine your results. Let's explore those next.

Focus on Growing Monthly Sustainers

On a Monthly Giving Awareness Week podcast, Kelsey Kramer shared data from Giving Tuesday showing that while the overall percentage of current donors enrolled in recurring giving programs grew from 3.76% in 2023 to 6.23% in 2024, the percentage of new donors choosing a recurring giving option has stayed relatively flat—hovering just below 2%.

For organizations with strong monthly sustainer programs, the percentage of donors giving through a recurring program can range from 15% to 30% of their active donors.

Monthly sustainer programs are the lifeblood of many nonprofit organizations because they provide a guaranteed income stream to help sustain the organization through the ups and downs of the market, while also allowing the organization to take more risks with other investments.

Regarding our fundraising levers above, monthly sustainer programs effectively check the top three boxes in a significant way. Gift frequency—check. Gift or donor value—check. Decreased contact frequency or marketing spend—check!

Furthermore, monthly sustainer donors have incredibly high retention rates, which takes some of the pressure off your donor acquisition programs. Converting an existing donor to a sustaining donor is likely worth approximately seven or eight new single-gift donors. But most importantly, these very loyal, high-frequency donors become valuable volunteers, mid-level and major gift upgraders, and also planned giving or legacy gift donors.

Funding Sustainer Investment and Budgets

The big brand nonprofit organizations have been very successful with short-form direct response television (DRTV) and also face-to-face or street canvassing to develop larger sustainer acquisition programs. And unlike donors acquired through existing direct mail, those acquired from DRTV—and especially face-to-face—are typically in the 35- to 45-year-old range. In most cases, these nonprofits have spent millions of dollars developing those channels, and, as importantly, they already had high brand awareness to make them work.

Most nonprofit organizations lack the resources or brand awareness to effectively utilize those channels. However, growing monthly sustainer programs should be a heightened strategic priority for nearly all nonprofit organizations, as it involves converting existing active donors into recurring gift donors.

Ideally, you'd be able to make a case for additional investment or budget dollars to fund your activities. However, if you need to redirect existing budget dollars, here are a few practical ideas to consider.

- Identify your least effective marketing spend and re-direct it: It's probably the easiest way to approach your funding needs.
- Focus on contact frequency and cadence: If you're like most nonprofits, you mail your active donor files 20 times per year, and every active donor receives every single donor appeal, even though research shows that donors exhibit significant seasonality in their donation patterns.

  In recent models for direct response agencies, Wiland developed and incorporated seasonal giving variables from within a nonprofit's data and combined them with seasonal giving variables from the larger cooperative database. We found that we can drop up to 30% of the mail volume without impacting response rates. In fact, in a 20-segment model, we were able to identify 97% of responders in segments one to 14; segments 15-20 performed at a net revenue loss and could be dropped.

  Keep in mind that adjusting contact frequency and cadence doesn't mean cutting all communications. In most cases, it simply means skipping every other appeal during a donor's off-peak giving periods. This could reduce your total mailings by about four or five appeals—but imagine the cost savings. You'd still be reaching that donor around 15 times per year, which is unlikely to hurt retention.
- Use post-merge optimization: It's smart—and perfectly okay—to shift some of your acquisition budget to support your sustainer program, as long as it's done strategically. Most acquisition lists include a portion of names that can be safely dropped, and a good post-merge optimization model can identify those low-performing records. In fact, it's common to find 7% to 15% of names in the net file that simply aren't worth mailing.

By implementing some or all of these approaches, I believe that you'll be able to find much of your needed budget to support your sustainer program marketing.

Leveraging the Data Cooperatives for Modeling and Data Appends

Not every donor is a candidate for a monthly sustainer ask. Remember that last year, only 6.23% of donors were recurring donors. So instead of including all donors, you'll want to identify and target only the most likely sustainer prospects. By doing so, you'll be able to initially focus more marketing dollars on each prospect, thereby making your budget spend stretch further.

Fortunately, there are seven or eight nonprofit cooperative database providers (in addition to Wiland) that can help you identify likely monthly sustainers, as each cooperative has donor transactional data spanning thousands of nonprofit organizations. And, while you may have very limited information on each of your donors, the cooperative database companies have incredible databases that combine commercial transactional behavior, demographics, and highly predictive nonprofit transactional data, including channel preference data.

Many of these providers have developed specific variables, such as Monthly Sustainer Propensity and Channel Responsiveness Indicators, that are ideal for identifying not only which donors to target but also which channel would be most effective.

And, because telemarketing (TM) remains the best "converter channel" because it involves direct donor engagement and the skills of a telemarketing agent, Wiland works closely with many telemarketing partners. The telemarketing company provides us with a call disposition file that chronicles whether a donor was contacted, whether a voice message was left, whether an operator interacted with the donor, and whether a sustainer pledge and payment or a single gift was made. Wiland can then build custom TM response models that provide even more targeted opportunities for individual organizations.

Summary

The fundraising landscape is undergoing its biggest shift in over two decades—and with donor files shrinking, expanding your monthly sustainer program is more important than ever.

To succeed, you'll need the right offer and compelling creative to encourage existing donors to commit to recurring giving.

Reach out to your database cooperation partner. Their experience, along with advanced data and modeling capabilities, can help you optimize your other programs to help fund your efforts—and, more importantly, identify and target donors who are most likely to become sustainers.

DMFA Awards WINNERS

Overall Winner and Direct Mail Mid-Level: Northern Great Plains and Tribal Lifeways Appeal, World Wildlife Fund/Newport ONE

OVERALL WINNER AND DIRECT MAIL RENEWAL ▶
World Wildlife Fund/Newport ONE

DIRECT MAIL RENEWAL
Holy Apostles Soup Kitchen/Allegiance Group + Pursuant

DIRECT MAIL ACQUISITION
The Statue of Liberty-Ellis Island Foundation/MKDM

DIGITAL ACQUISITION
National Audubon Society/Stagecoach Digital

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See the winning creatives and read more about each campaign at dmfa.org

ENGAGING IN AN "ALWAYS-ON" SUSTAINER MINDSET

Zoe Clarke, Mal Warwick Donordigital

If you're like most organizations, you hold a sustainer drive once or twice a year. During these campaigns, you'll be laser-focused on recruiting new monthly donors and upgrading current sustainers to a higher level of commitment. You'll have an articulated goal. You'll shine a bright light on the importance of sustained giving.

And then ... You'll move on.

Too often, we confine this crucial form of giving to one or two campaigns a year. Sustainer giving is the key to a sustainable revenue stream. And in a world of decreased donor conversion and lower retention rates, recurring gifts are more important than ever.

At Mal Warwick Donordigital, we've seen time and time again how a solid monthly giving program can help organizations weather the storm through times of donor hardship and uncertainty.

That's why the savviest fundraisers are changing their mindset—reframing how they fundamentally think about monthly giving.

What does an "Always-on" mindset mean?

An "always-on" sustainer mindset forces us to think outside the confines of our campaigns to elevate monthly giving all year long. It means embracing sustainers as the heart of our program and aligning our efforts and strategies accordingly. An always-on mindset doesn't mean abandoning bi-annual sustainer campaigns—it means prioritizing monthly giving the other ten months of the year, too!

What does an "always-on" mindset look like in practice?

Here's where the rubber meets the road. To bring this new mindset to life, we'll need to make tangible changes to our fundraising strategies and tactics. Here are a few ways you can implement this in your non-profit:

① Promote monthly asks year-round

We suggest promoting a monthly ask in at least one email per campaign. This could be as simple and passive as a P.S. or a call-out box raising awareness about your sustainer program—or it could mean reformatting your appeal to a true monthly ask. We suggest a mid-campaign email rather than a kick-off or deadline message.

② Consider defaulting donation pages to a monthly ask.

Any change to your donation pages should be tested, as it has the potential to impact conversions and immediate revenue, especially during important campaigns.

Start with pages that aren't connected to a direct ask, like your home screen donate button. Promoting a monthly gift as the default option tells donors how important monthly giving is to your organization and makes a powerful statement about the best way to support your mission.

ALWAYS ON

Defaulting to a monthly ask also changes your supporters' mindset. Donors who land on your page won't ask themselves, "Why should I become a sustainer?" They'll ask themselves, "Why not?"

③ Retarget recent one-time donors with monthly asks wherever possible.

Meta, display, and email are all great ways to put a monthly ask in front of recent donors. Be careful not to turn donors off. Your messages should relay gratitude (lots of gratitude), create a sense of community, promote your member benefits, and demonstrate impact.

Although you may not see many direct conversions from these efforts, your donors will be primed to consider a monthly gift the next time they give.

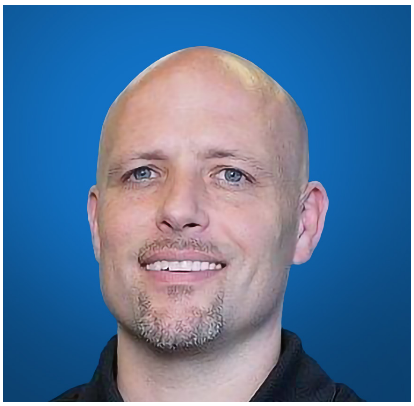
Sustainer giving is too important not to consider all year long. Your monthly donors have already embraced an always-on mindset with their recurring giving—now it's your turn!

2025 DMFA NEW BOARD MEMBERS

Jennifer Minogue

Director, Monthly Donor Cultivation and Retention
ASPCA

As the ASPCA's Director of Monthly Donor Cultivation and Retention, Jennifer oversees the strategic direction of the ASPCA's sustainer programs. She has contributed to the success of the ASPCA's life-saving work through multiple roles since late 2006, building on a life-long passion for animal welfare to engage donors and reach targeted fundraising goals. In her current role, Jennifer sets and implements the retention, upgrade and recapture strategy for recurring donors through multi-channel marketing (telemarketing, website, email, SMS and mail). She manages the ASPCA's outbound telemarketing campaigns with a focus on optimizing strategies to ensure the success of this channel as a valuable source of long-term monthly donors. Additionally, she is responsible for monitoring and reporting on the overall health of the monthly donor file of over half a million Guardian members and the retention of annual sustainers as well as developing cultivation tactics that drive growth.



Jeff Thomas

Director of Business Development
RWT Production LLC.

Jeff has held various positions at multiple direct mail production facilities over his 25+ years in the industry. He started on the production floor of a mailshop during a summer job in college, where his hands-on experience began. He worked in every department and on all pieces of equipment. From warehousing, to bindery, to variable personalization and inserting. He then went on to hold roles in production management, estimating, and ultimately sales and business development. He is also a long-time DMAW volunteer and former board member where he chaired the sponsorship committee.

Diana Lee (she/her)

Vice President of Integrated Marketing
Faircom New York

Diana brings over 20 years of experience in direct response fundraising across both the nonprofit and agency sectors. She specializes in developing and optimizing multichannel direct marketing and mid-level donor programs that drive donor engagement and long-term value. Before joining Faircom, Diana launched her career at iconic New York institutions including the New York Public Library and the Whitney Museum of American Art, where she built and led their direct marketing and membership fundraising programs. Throughout her career, Diana has transformed traditional fundraising into integrated, omnichannel strategies—building programs from the ground up and combining data-driven insights with creative that resonates. She especially enjoys diving deep into analytics and using those insights to inform compelling creative strategies.

Save the Date

JULY

- **DAY 1: Direct Response 101**
  07/15/25, 1:00 PM – 4:30 PM (EDT)
  LOCATION: Zoom
- **DAY 2: Direct Response 101**
  07/17/25, 1:00 PM – 4:30 PM (EDT)
  LOCATION: Zoom

AUGUST

- **Strategies for Improving Year-End Performance**
  08/05/25, 2:00 PM – 3:00 PM (EDT)
  LOCATION: Zoom
  SPEAKERS:
  Amanda Peña, *Vice President, Accounts; Staff Development Director,* **MissionWired**
  Kylee Lorio, *Manager, Digital Fundraising,* **Human Rights Watch**

SEPTEMBER

- **NY Event: 2025 Donor Advised Fund Fundraising Report**
  09/30/25, 2:00 PM – 5:00 PM (EDT)
  LOCATION: 375 Hudson Street New York, NY
  SPEAKERS:
  Karin Kirchoff, *Founder and President,* **K2D Strategies**, Mitch Stein, *Head of Strategy,* **Chariot**
- **DMFA NYC Happy Hour**
  09/30/25, 5:00 PM – 7:00 PM (EDT)
  LOCATION: Houston Hall, 222 West Houston Street at Varick Street, New York, NY

Be sure to check your email and dmfa.org for more information.

DMFA Professional Development Fund

The DMFA believes that when any one of us becomes a better fundraiser, it helps lift up our peers as well. That's why the DMFA Professional Development Fund was created—to help fundraisers, and those interested in fundraising as a career, pursue education by subsidizing some of their costs. This scholarship is available to nonprofit organizations, students, and non-working professionals.

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- CRM recommendations
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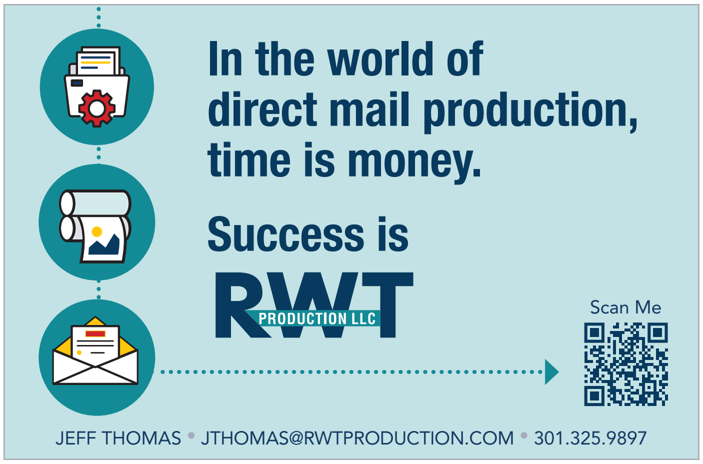
- Year-End email subject lines
- Cultivations that raise funds

DMFA members can access our dedicated discussions board by logging in at **dmfa.org** and navigating to **Forum** on the lefthand menu.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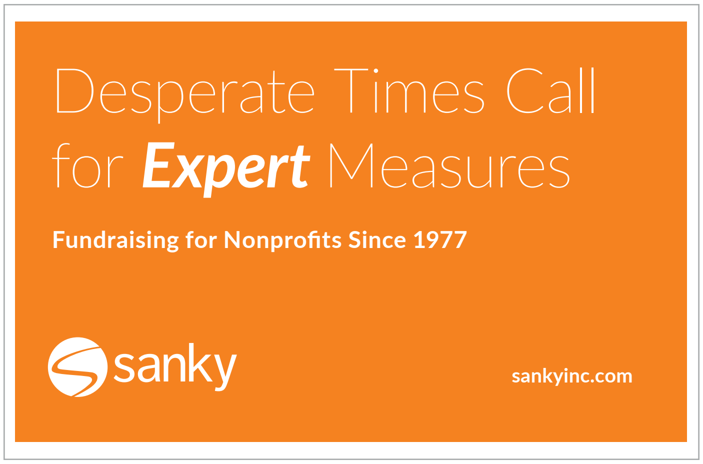
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BUILDING SUSTAINABLE NONPROFIT REVENUE THROUGH RECURRING DONOR PROGRAMS:
Navigating the Regulatory Landscape

In today's challenging fundraising environment, recurring donors represent the bedrock of financial stability for nonprofit organizations. These loyal supporters provide predictable revenue streams that allow organizations to plan confidently for the future, reducing dependence on seasonal giving, individual grants, major donors, or one-time events.

However, creating and maintaining an effective recurring donor program requires strategic planning, donor-centered practices, and careful navigation of an evolving regulatory landscape.

The Regulatory Context for Sustainer Programs

The regulatory environment for recurring transactions continues to evolve, often in response to challenges in the commercial and subscription world. This was evident in 2022 when Mastercard introduced new Recurring Transaction Regulations that initially threatened to create significant compliance burdens for nonprofits.

As Erica Waasdorp of A Direct Solution explained in a July 2024 TNPA blog post, "Thanks to the convincing case presented by fundraisers and The Nonprofit Alliance (TNPA), nonprofits became largely exempt from those regulations, which was a major relief."

However, Waasdorp notes, "It is important to remember that rules strive to improve transparency and, thus, trust from consumers, donors, and most importantly, sustainers who provide that critical ongoing revenue to nonprofits." This principle of transparency should guide nonprofit practices regardless of regulatory requirements.

Recognizing the need for clarity in this complex area, TNPA's regulatory counsel, Bob Tigner assembled a volunteer committee in 2023 to develop comprehensive guidance. This committee of experts from various organizations worked "countless hours" to create the Sustainer Best Practices Guide, addressing 39 frequently asked questions about sustainers. Key takeaways:

1 Align Your Team Around Common Goals and Regulatory Understanding

For sustainer programs to thrive, organizational alignment is essential—not just around fundraising goals but also around regulatory compliance. "Make your priorities the starting point for your sustainer program's goals… it's crucial that your entire marketing team, all channel owners, share a common vision for that growth."

This collaborative approach ensures that sustainer acquisition and retention efforts are consistent across all touchpoints while maintaining compliance with current regulations and best practices.

2 Use Data to Drive Strategy While Respecting Privacy

Effective sustainer programs rely on robust data to identify prospects and tailor approaches. Data modeling can help define audience prospect pools, quantify audiences most likely to respond, and provide granular detail on current giving and demographic behavior.

However, organizations must balance these data practices with privacy considerations and regulatory requirements. The TNPA guide provides more context for navigating these sometimes competing priorities.

3 Prioritize Accessibility and Transparency

Making it easy for sustainers to reach you builds trust and improves retention. Best practices include:

- Providing direct contact information on your website, landing pages, thank you messages, and email receipts
- Creating a specific email address for sustainers that is regularly monitored
- Responding to inquiries promptly, ideally within one business day

These practices improve the donor experience and align with the spirit of regulations designed to protect consumers and strengthen trust.

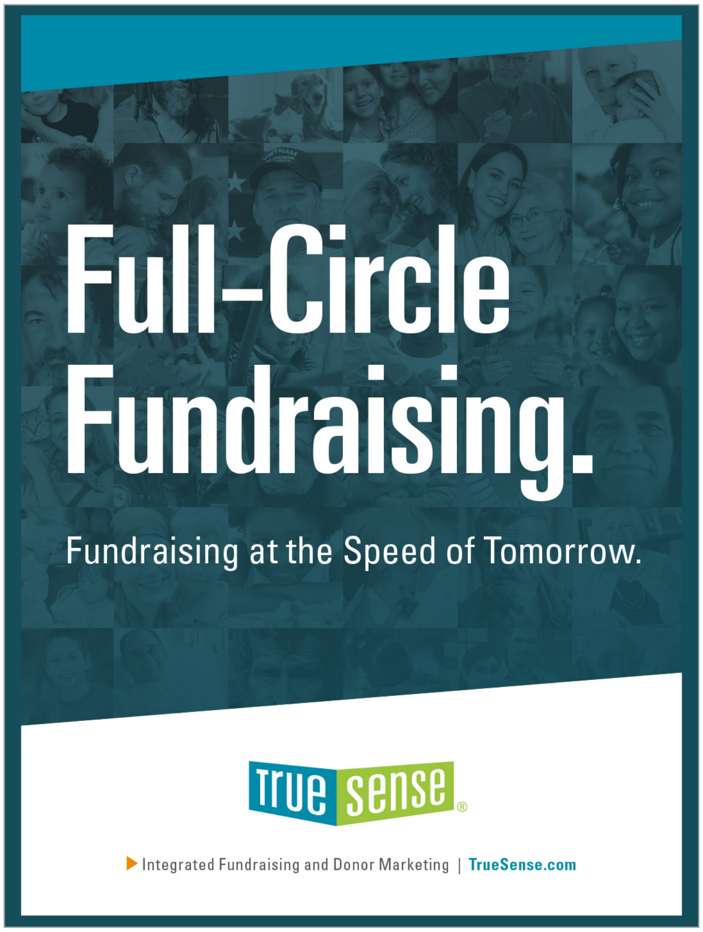
4 Stay Informed About Regulatory Changes

The regulatory landscape for recurring transactions continues to evolve, like the FTC's new "Click-to-Cancel" Rule that makes it easier for consumers to cancel subscriptions and memberships. While that rule doesn't directly apply to nonprofit recurring donor programs, it nevertheless continues to impact donor and consumer expectations for customer service, transparency, and ease of use.

Organizations should maintain relationships with their payment processors and database/CRM providers, who should be the first to know about the latest guidelines on payment processes and partner with you in implementing any necessary changes or updates.

Fundraisers that balance fundraising effectiveness with regulatory compliance ensure that transparency and donor trust remain central to their sustainer strategies.

Download your copy of the free Sustainer Best Practices Guide here: https://tnpa.org/wp-content/uploads/Sustainers-Go-To-Guide-2024-TNPA.pdf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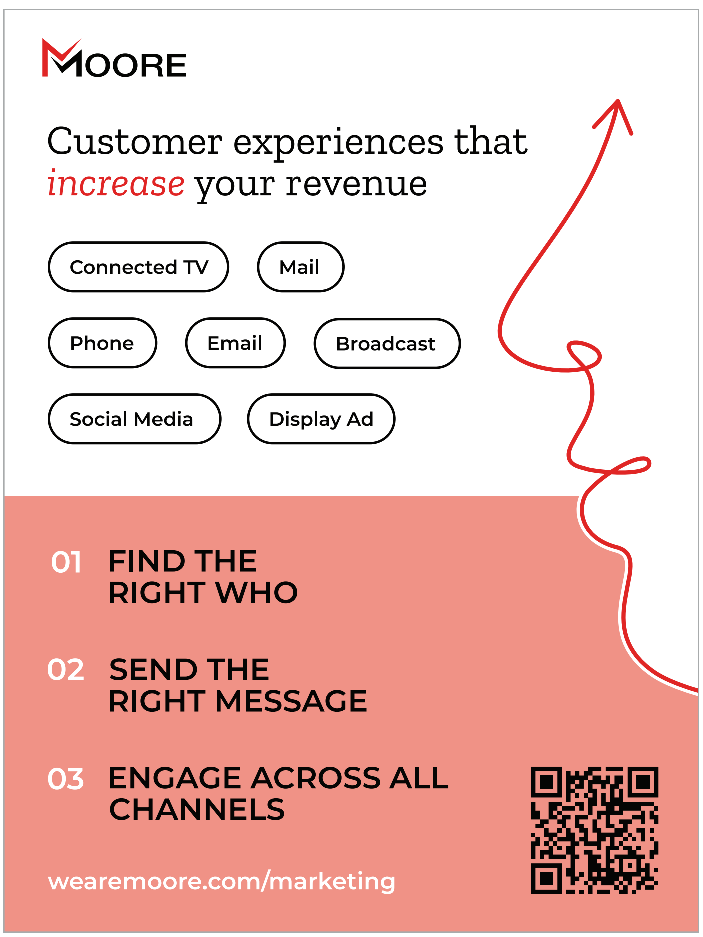
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