



TENTPOLE MARKETING:

Creating Unique Occasions to Engage and Give

Hayden Golden, Whittier & Associates

Many nonprofits invariably face the same pain point with their fundraising. They successfully generate revenue at year end but struggle to engage and renew donors throughout the rest of the year.

TENTPOLE MARKETING provides a great opportunity to utilize all your direct response channels and maintain momentum between major campaigns and a steady cash flow.

Many organizations are already executing tentpole campaigns (think: Giving Tuesday). Really it's any moment—ideally between January and October—like a birthday, milestone, holiday, or a recognized event like International Women's Day, Nurses Week, or Breast Cancer Awareness Month. Resources for identifying tentpoles include un.org/observances, timeanddate.com, and multi-faith calendars.

CASE STUDY




For one organization, January became a time for a planned giving tentpole. Following a season of sustained asks, the organization recognized that donors needed a break from the traditional appeal. Likewise, it was capitalizing on a time when many people are making resolutions. With an individual donor file of approximately 22,000, the organization sent one direct mail piece and two emails promoting its partnership with FreeWill and ultimately generated 33 new planned giving leads.

PLANNING FOR A TENTPOLE

While creativity is important, thoughtful planning makes a tentpole successful.

Start by assessing current lulls in giving patterns. For many organizations, that's probably mid-January through March and again in the summer. Then apply institutional knowledge. Ask yourself when other teams are busiest, when people are taking vacations, and if there are any key stakeholders who won't be available. For example, April is National Volunteer Month, making it a great opportunity for peer-to-peer fundraising through email and social media. But it's also when school vacation happens, making in-person events challenging.





Successful tentpole planning should:


-  Determine what the tentpole is and what organizational need it fills, whether a social media blitz to raise awareness, multi-channel cultivation, or a major fundraising event to increase revenue.
-  Identify the individuals and teams who are needed to make the tentpole successful and any deadlines.
-  Detail goals by channel or audience. That way you will be able to measure overall success and places for improvement in the future.

MAKING YOUR TENTPOLE SPECIAL

The best tentpoles center your organization's impact and donors' interests while remaining *authentic*.

Tips for success:

-  Utilize your logo, fonts, and colors as much as possible so your audiences recognize you.
-  Make it easy to participate and share. Successful tentpoles have a single ask and outcome like signing up to volunteer, signing a petition, or donating.
-  Set your own timeline. Just as Giving Tuesday has become a week (or more!) of previews and extensions, you can build anticipation and add follow-ups to your tentpole.
-  Add joy where you can. Even if you have a more formal organizational voice, supporters want to feel good about the nonprofits they support—and it allows more serious moments to feel impactful.

Ultimately, the successful tentpole is the sustainable one that can be improved upon every year. By carefully planning and executing these campaigns, nonprofits can strengthen relationships with their communities while transforming traditional giving patterns into year-round engagement and fundraising opportunities. 



Message from the President

Dear Friends and Fellow DMFA Members,
I hope you're enjoying the holiday season and finding plenty of time for rest and reflection as you prepare for 2025 and the personal and professional challenges and opportunities it brings.

The new year will begin with many uncertainties facing our industry. The DMFA is here to support and encourage our members as we work together for more effective nonprofit fundraising. We're so glad to have you with us!

The DMFA is committed to recognizing the talent and contributions of those within our industry. With that in mind, I hope you'll join me in congratulating our 2024 Marketer of the Year, Karin Kirchoff, President and Founder of K2D Strategies. Karin has dedicated three decades to helping nonprofits raise the funds needed to pursue their missions. She generously served as a DMFA board member as well! New this year is the DMFA Spark Award, a unique recognition of an emerging leader in our profession. Our inaugural Spark Award winner is Katie Tamaro, Digital Fundraising Manager for Citymeals on Wheels. Katie is a rising star in direct marketing fundraising. I'm sure we will see much more from her in the years to come.

As we make plans for 2025, I'm pleased to enclose the winter edition of our DMFA newsletter. This issue includes useful content across many areas, but you'll quickly see themes of cost savings, efficiency, and innovation emerge. From determining your most cost-effective postal approach, to why

it might be time to consider transitioning to a single-source database, to exploring the benefit of using AI as a predictive selection tool, this issue encourages all of us to reexamine once-considered cornerstone practices to improve efficiency, increase response, and save costs.

You'll also find tips for strengthening mid-level programs, maximizing "tentpole" marketing, and making the most of the wonderful experts around you to create more successful campaigns. There is also a helpful overview of some of the challenges nonprofits have faced since California's "Platform" law went into effect last June.

The DMFA wants to help our members learn from and connect with one another. We have several upcoming educational experiences you won't want to miss as we head into the new year:

- **The Phone Isn't Dead: Harnessing the Power of Telefundraising** – January 16, 2025
- **Data Privacy Legislation: What to Expect in 2025** – February 11, 2025
- **Telemarketing Basics** – March 5, 2025
- **Relational Mid-level Programs and Direct Response** – April 15, 2025

Every year is an opportunity to grow and improve. The DMFA looks forward to helping all of our members and their fundraising programs make 2025 a year of progress and success.

I look forward to connecting with you at an upcoming event!

Best,



Kristen Shank Finn
President, DMFA



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Saving Cost, Saving Time:

Simple Strategies to Streamline Your Direct Mail Program

Rayna Puglisi Clarke, Lautman Maska Neill & Company

If there's one certainty in direct mail fundraising, it's that costs will rise—from postal increases to the price of paper and more! As stewards of the funds that nonprofits allocate for fundraising, we must continually adapt our strategies to offset these increases while maintaining strong results.

Our team at Lautman Maska Neill & Company recently compiled our best cost-saving ideas—from postage and format testing to audience versioning and the oft-overlooked idea: *saving time*. Here are our recommendations!

For one organization, we tested a **CRE against the control BRE** in acquisition, which led to no change in results—but significant savings on return postage costs. For another nonprofit that mailed every mid-value appeal with a stamped reply envelope (SRE), we **tested into a BRE** for select campaigns—leading to a yearly cost savings of over \$100k!

Another client mailed their \$500-999.99 donors via first class postage for years, but testing **nonprofit postage** yielded no difference in results at a lower overall cost.

And speaking of specific audiences, one nonprofit included a large volume of non-mail-acquired donors in almost every appeal. By testing a **less expensive postcard with a QR code to these “non-mail” donors**, we were able to bring in roughly the same net revenue while streamlining this audience's communications. (Please note that we do not recommend this tactic for donors who already give through the mail.)

Another organization wanted to reduce costs in their renewal series. We tested a **“copy effect”** of their February Renewal in the March time slot. The copy mailing had no statistically significant difference in results compared to the original March mailing, but gang-printing these two campaigns together decreased costs significantly.

When it comes to package formats, sometimes less is more. Another of our clients tested a **smaller (cheaper) address label sheet** as the premium in acquisition and found it maintained all performance metrics while lowering cost to acquire (CTA) by 19%!

Also in acquisition, another nonprofit **tested out of a buckslip promoting a back-end premium** in favor of an image of the premium on the outer envelope. This eliminated one package insert entirely, boosted response by 12%, and lowered CTA by approximately \$17.

Another organization's long-standing control package featured three photocard inserts. We tested replacing the cards and **adding the photos (with captions) to the letter**. This test yielded substantial cost savings over the course of a year without affecting response or revenue.

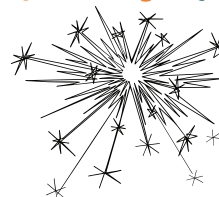
And of course, it's important to consider more than just monetary cost but the cost of your team's time as well.

Ask yourself:

- ▶ Does your campaign need five different letter versions, or do they just increase work without increasing revenue?
- ▶ Are each of your reports used to guide future strategy, or are some created just out of habit?
- ▶ Do you need to test in every campaign, or are certain controls so strong that you can skip testing occasionally to redirect those cost savings elsewhere?

Freeing up time leaves more room to get creative—which can help you identify strategies that boost results and save on spend.

We hope these ideas spark savings in your own programs! 🎨



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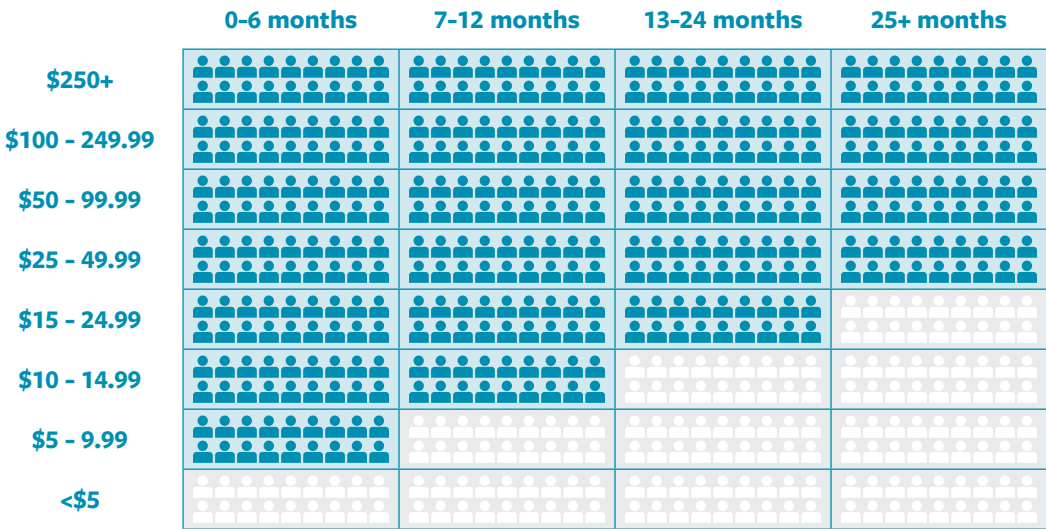
“Mail less, better.”

John Thompson, TrueSense

In today’s dynamic fundraising environment, remembering this decades-old maxim is still relevant.

With marketing costs in every channel rising, nonprofits urgently need fundraising solutions to (a) invest smarter and (b) improve efficiency. Solutions that avoid the long-standing inefficiencies built into traditional marketing approaches.

One such traditional (and inefficient) approach is selection strategies built on broad donor file segments, e.g., Recency/Frequency/Monetary (RFM) segmentation. RFM was and largely still is the mainstay targeting approach for many nonprofits.



RFM selects make decisions based on broad average performance, and not whether or not each constituent in the segment has value or will be responsive to a unique campaign.

Furthermore, RFM targeting is backward-looking, relying on past segment performance and assuming it will repeat. While historical data is valuable, AI-powered selection predicts each donor’s current and future giving potential, greatly improving campaign success.

What Can AI Do That RFM Can’t?

AI enables nonprofits to score individual donors within their CRM using machine-learning algorithms based on first- and zero-party behavioral data. We’ve found that first-party data is consistently the most predictive, as it best reflects your donors’ relationships

with your organization.

Individual donor scores, based on hundreds of data points, give nonprofits the confidence to identify individual donors who are statistically likely to give and donors who are unlikely to give, who would have been buried in a traditional select within RFM segments.

Bottom line? More bang for the campaign investment buck, as targeted quantities generally decline, while efficiency and performance improve. →

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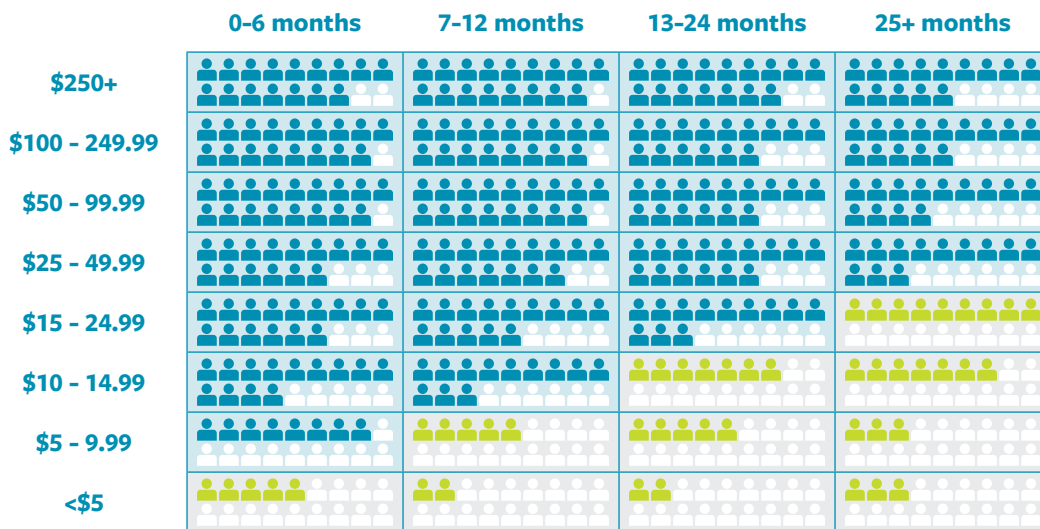
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- Collaborative approach:** We work closely with you to understand your unique needs and challenges.

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AI-powered donor scoring identifies individual donors, using hundreds of predictors, to find who are most likely (and not likely) to give, across your entire CRM.

A Brief Case Study

Using an AI-powered donor scoring engine that targeted lapsed donors, we identified the most response-likely and investment-worthy lapsed donors across a client's entire file. Just as important, we also found those donors NOT likely to respond or appropriate for investment—omitting them from the selection.

Comparing AI-powered donor scoring to prior years where one organization used traditional RFM segmentation instead, we found dramatic year-over-year improvements:

- 8% more gifts
- 19% more revenue
- 46% reduced campaign volume
- 56% reduced campaign expense

These results point to significantly increased net per donor returns in this (and future) campaigns because of improved efficiency that could only be achieved using AI.

In short, "mail less, better."



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The growing importance of data-driven solutions like AI-powered donor marketing heralds an exciting future for nonprofits with numerous possibilities and potential, albeit some risk as well for the nonprofit sector. In the meantime, machine learning enables us to build AI-powered donor intelligence models that have very real benefits today, making fundraising investment dollars go further and returning positive revenue faster than ever. ■

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Your Checklist for Postal Success:

Maximizing Efficiency in Today's Cost-Conscious Landscape



Michelle Johnston and Jaime McQueen, Production Solutions

As costs continue to rise, especially in postage and logistics, developing a strategic postal approach has shifted from a “nice-to-have” to a necessity for nonprofit fundraisers. Postage alone can account for nearly half of your direct mail package costs, which makes a proactive and well-defined strategy essential. Below, we've outlined a checklist to guide you in creating a lean, optimized mailing approach that will help you make every dollar count.

✓ Have a Smart Postal Logistics Strategy

Effectively managing logistics is key to controlling costs and ensuring timely delivery. Understanding your logistics options allows you to minimize both postage and shipping expenses. Local entry, for instance, involves delivering mail to the nearest post office from the point of origin, saving on postal logistics work. This method is ideal for mail destined for nearby donors or first-class pieces that don't require commingling. Another strategy is commingling, where mail from various senders is combined to significantly reduce postage, particularly effective for nonprofits with small to medium mail volumes. Drop shipping, which entails transporting prepaid, presorted mail to USPS facilities close to the final destination, offers additional postage savings, especially for large volumes. Finally, hybrid solutions that use a blend of these strategies can yield both cost savings and adherence to in-home delivery dates. Partnering with an experienced logistics provider can help assess options that align best with each campaign's objectives. Each of these options requires careful planning, balancing cost savings with donor engagement goals.

✓ Take Advantage of Postal Promotions and Incentives

Each year, the USPS offers promotional opportunities that can reduce mailing costs if planned effectively. However, registration processes and timing requirements can be complex, so a proactive approach is essential. Highlights for 2025 include new and returning opportunities such as the Integrated Technology Promotion, which offers up to a 3% discount for incorporating digital elements like QR codes or augmented reality. The Tactile, Sensory, and Interactive Promotion provides up to a 4% discount for adding textures, scents, or interactive elements to the mail. The Continuous Contact Promotion encourages frequent, sequenced mailings to deepen donor engagement. Lastly, the Reply Mail IMbA Promotion leverages the Intelligent Mail Barcode Accounting system for Business Reply Mail, simplifying returns and reducing costs. Planning ahead for these promotions allows you to maximize savings while enhancing campaign creativity.

✓ Consider First-Class vs. Marketing Mail

While shifting to Marketing Mail can cut costs, it's important to weigh the trade-offs. Marketing Mail requires a minimum of 200 pieces and doesn't include forwarding or return services without additional fees. In contrast, First-Class offers faster delivery and includes these services, which may benefit more personalized campaigns. First-Class typically delivers within 3-5 days, while Marketing Mail can take up to 14 days. For campaigns where timing is critical, the extra cost of First-Class may be worth it. To ensure you're balancing cost with effectiveness, test the impact of Marketing Mail on donor response rates before committing.

✓ Maintain Data Integrity with Address Hygiene

Regularly cleansing your address lists not only saves money but also conserves resources by reducing undeliverable mail. Utilizing services like the Coding Accuracy Support System (CASS), which verifies address accuracy, and the National Change of Address (NCOA) system, which keeps lists current, can significantly enhance deliverability. Address Correction Services (ACS) provide automatic updates for incorrect addresses, thus helping to reduce waste. Maintaining address hygiene is essential throughout a campaign's lifecycle, from data pull to final postal entry, ensuring that every mailpiece reaches an actual donor.

✓ Track and Measure Your Mail's Impact

Visibility into your mail's journey allows for informed adjustments and transparency. Tracking provides valuable insights, from the moment your mail leaves the production facility to its arrival at a donor's home. Mail tracking enables you to know exactly where your mail is in transit, monitoring delivery progress. Similarly, reply mail tracking allows you to track inbound replies or donations, enhancing your ability to forecast revenue accurately. Additionally, matchback analysis lets you cross-reference online gifts with mail campaigns, providing a comprehensive understanding of multi-channel engagement. These tools empower you to adjust campaigns based on real-time performance, thereby enhancing the effectiveness of each touchpoint.

✓ Focus on the Fundamentals

Basic quality control measures can prevent unexpected costs and help maintain campaign efficiency. By using an indicia instead of stamps, you can save both time and labor, though it is wise to test donor response. Monitoring package thickness is essential

as mailpieces nearing a quarter-inch require extra care; slight adjustments can prevent surcharges. Additionally, testing cost-effective formats, such as switching from flat rate to letter rate formats like a slimline calendar, can significantly reduce postage costs. Focusing on these fundamentals creates a well-managed campaign with fewer surprises and optimized expenses.

✓ Stay Aware of Postal Affairs

The USPS won't raise postage rates in January 2025, providing a budgeting advantage. However, USPS has the authority to increase rates up to twice a year. This temporary stability gives you time to prepare for potential increases in mid-2025, helping preserve the long-term success of your program. Alongside planning, engaging in industry advocacy efforts helps promote affordable and reliable mail services for nonprofits. Organizations like The Nonprofit Alliance, Alliance of Nonprofit Mailers, and Keep Us Posted champion policies and practices that benefit

mailers. Consider joining these efforts to make a meaningful impact on the industry.

✓ The Importance of a Strong Partner

A knowledgeable partner can make a substantial difference. By providing operational support and strategic insights, they can help you navigate the USPS landscape, capture cost-saving opportunities, and enhance campaign performance. Acting as an extension of your team, a good partner helps streamline processes, mitigate risks, and maximize your direct mail program's potential.

This checklist provides a comprehensive guide to optimizing your postal strategy in an environment of rising costs. By planning ahead, maintaining data integrity, and leveraging industry expertise, you can ensure that every mailing investment drives greater value and amplifies your fundraising impact. ■■

Who is on your bench?

Christiana Trenum, Planet Direct

Collaboration has always been my favorite tool in my direct mail production tool belt. In an industry that thrives on creativity and agility, working closely with teams and partners can transform obstacles into opportunities for innovation. This principle feels especially relevant as we enter 2025. Fundraisers received the welcome news that there will be no postage increase in January, a relief in the face of significant budgetary pressures. For nonprofits relying heavily on print and direct mail, this news provides a chance to channel resources in smarter ways—investing in new approaches rather than simply covering rising costs.

Though sports analogies are a bit tired, the “bench” is a great visualization for those players that you can call on to strengthen your approach based on the goals of the game and its challenges. A successful team includes more than your internal colleagues. It also includes your partners and suppliers. Specifically in direct mail, utilizing your print and production partners can help you identify trends, cost saving capabilities, or available materials at a reduced cost. Having these conversations periodically positions you to make decisions and quick pivots that ultimately save money and time on your campaigns. Digital printing is a rapidly evolving technology that allows extensive personalization, and understanding the capabilities can help you plan and design accordingly.

Clearly identify your team and utilize the players to build a winning strategy. Jump on those phone calls, discuss the goals, and brainstorm together with your team. Utilize your bench! Collaboration leads to innovation. Our industry continues to require creativity and testing. While things continue to change rapidly, the fundamental hack of strong communication wins every single time. When everyone—designers, marketers, and production teams—works together, new possibilities open up.



Whether it's through enhanced personalization, innovative formats, or data-driven insights, the collaboration empowers us to respond to market pressures with flexibility and insight. ■■



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Saving Resources by Focusing Audiences

John Wilburn, Epsilon

In today's rapidly evolving landscape, nonprofits are increasingly recognizing the importance of streamlining their direct response fundraising efforts to save costs and enhance donor engagement. The analogy of managing multiple vertical list sources to sorting through a stack of local phonebooks paints a clear picture of the inefficiencies nonprofits face. Historically, nonprofits have relied on various sources, leading to redundancies, increased costs, and wasted time identifying potential donors. This multi-source approach often results in duplicated records and a complex process of maintaining and updating separate lists, driving up costs significantly—by up to \$100,000 annually for even mid-sized organizations.

The cost-saving solution lies in consolidating these disparate sources into a single, unified audience database. Just as online directories replaced printed phonebooks, cooperative databases offer a modern, more efficient way for nonprofits to manage their data. These cooperative databases include data from nearly all U.S. households and layer in additional insights, such as financial and demographic data. This allows nonprofits to target their outreach efforts more effectively, improving both donor acquisition and engagement rates.

By transitioning to a single-source database, nonprofits can eliminate duplication, reduce expenses, and gain a complete view of their prospective donors. In one study, 97% of the prospects mailed by a nonprofit were already present in the database, highlighting the potential to significantly streamline prospect identification and reduce the reliance on costly, redundant audience sources.

Moreover, advanced technologies like machine learning and artificial intelligence (AI) are revolutionizing how nonprofits connect with potential donors. AI-driven predictive models can analyze vast amounts of data to identify patterns and trends

that human analysts might miss, enabling more precise targeting and personalized engagement. This combination of data-driven insights and personalized outreach can significantly enhance a nonprofit's ability to secure donations and further its mission.

The cost savings from this approach are substantial. By consolidating audience data and leveraging AI for targeted outreach, nonprofits can reduce the overhead associated with managing multiple data sources and achieve better results with less effort. This shift represents a significant opportunity for organizations to maximize their impact while minimizing costs, ensuring that more resources can be directed toward their core mission.

In conclusion, transitioning from the outdated, cumbersome method of managing multiple phonebook-like lists to a streamlined audience database can offer nonprofits tremendous benefits. Not only does it lead to cost savings, but it also enhances donor targeting, engagement, and overall fundraising effectiveness. Nonprofits that embrace this shift will be better positioned to thrive in today's competitive fundraising environment. ■■

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Zoom

SPEAKERS:

Ashley Fedrigo, *Vice President*, **CAUSEWORX**; Tanya Tucker, *Associate Director*, *Loyalty, Recurring Revenue Marketing*, **SickKids Foundation**; Letal Zidkony, *Senior Director*, *Donor Loyalty & Marketing Strategies*, **Planned Parenthood Federation of America**

FEBRUARY

WEBINAR

- **Data Privacy Legislation: What to Expect in 2025**

02/11/25, 1:00 PM – 2:00 PM (EDT)

Zoom

SPEAKERS:

Shannon McCracken *CAE, CEO*, **The Nonprofit Alliance**; Britt Vatne, *President*, *Account Management*, **Adstra Nonprofit**

MARCH

WEBINAR

- **Telemarketing Basics**

03/05/25, 2:00 PM – 3:00 PM (EDT)

Zoom

SPEAKERS:

Caroline Mendez, *Vice President of Client Services*, **SD&A Teleservices**; Jennifer Minogue, *Director*, *Monthly Donor Cultivation and Retention*, **ASPCA**

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Midlevel Giving Spotlight

Creative Approaches to **STRENGTHEN** Mid-Level Programs

Jeff Muller, Crossroads Insights LLC

As the Fundraising Effectiveness Project has shown, we live in a time of continued donor attrition. That's why it is essential that fundraisers tap into the most creative ideas from across the spectrum of disciplines that comprise the profession to keep their programs healthy and thriving. Fortunately, Mid-Level giving practitioners are natural-born problem solvers, as evidenced by people like Amy Rhodes of CARE, who said, "I love this work because it's like a puzzle we get to put together."

I recently spoke with Amy and three other Mid-Level experts—Jo-Anna Alie at the World Wildlife Fund (WWF), Paul Leo at the International Fellowship of Christians and Jews (IFCJ), and Emma O'Leary at the Union of Concerned Scientists (UCS)—to learn about the innovations they are exploring at their organizations to ensure a sustainable fundraising future. Here are their stories:

Using Personalization to Nurture Enduring Relationships

Last year, WWF had a Mid-Level audit conducted that resulted in several recommendations for how to improve the program, including deploying greater personalization in their donor communications. As a first step, Jo-Anna started segmenting their data by region for select appeals, both mail and digital. This is matched to the three gift officers on the team—for each of whom a custom handwriting font was created. This allows the inclusion of a personal note in each gift officer's handwriting for mailed pieces. For digital sends, they simply include a message customized by each gift officer. Over the first months of the program, they have added a lift note from the gift officers with the mailed November appeal, had the gift officers make the ask in the January lapsed donor email, and made the final mailed appeal of the fiscal year a note card from the gift officers.

"We're still trying to figure out how to measure success with the addition of personalization into our mass market fundraising," said Jo-Anna. "We don't expect that this approach will be the sole catalyst that inspires donors to support WWF. Instead, we view the addition of personalization as a long-term strategy to build the relationships we'll need to cultivate our next generation of Mid-Level and Major donors. That said, there is one recent example of a donor who responded to a personalized package

with a significant major gift. Of course, it's hard to say if it was the note or whether it may have just been the right time for her. But it's encouraging."

Leveraging Video and Technology to Cultivate Stronger Donor Connection

Because each member of IFCJ's leadership giving team has 600 donors in their portfolio, Paul says they are leveraging technology to efficiently cover as much ground and have as many relationships as possible. That's why this past year they started using Gratavid, a video messaging platform from Gravyty that helps organizations create and manage personalized videos for fundraising and engagement. Paul's team is initially focused on creating highly customized videos for IFCJ's most generous Mid-Level donors, deploying the product in several different ways so far. This includes using video to wish their donors happy birthday; helping connect their donors to work happening overseas through short, timely impact videos; and sending thank-you videos from their CEO to the several donors who made the largest Mid-Level gifts the previous month.

According to Paul, "We're still learning about what success looks like. For one, these emails have a much higher open rate than our standard marketing emails. According to M+R's 2024 Benchmark study, the average click-through rate for a fundraising email is 0.54% versus a 12% click-through rate for our most recent Gratavid send. While these videos don't always get viewed, they can be very impactful. We had a case where a donor was so touched that he viewed his video more than 100 times. Our goal is to help our donors get better connected to our work on the ground, which is thousands of miles from where they live. So far, it appears to be working."

Empowering Mid-Level Donors to Leverage Their Giving to Address an Urgent Need

Emma is a big believer in DMFA and the Mid-Level Giving Summit, which she credits for providing a forum for discovering great ideas she can adapt for UCS. One idea she gleaned from the Summit two years ago was for a matching gift fund seeded by an organization's Mid-Level donors. At UCS, this is currently being piloted with the Science Emergency Fund Matching Challenge, an effort to shore up more match dollars to seed a broader year-end match

campaign by establishing a new “Emergency” fund, created to address the perilous situation facing science in the current political climate. Not only is science on the line in this election year, but it has also taken several hits in recent Supreme Court decisions. This timely topic, which is central to UCS’ mission, provided the perfect opportunity to test this approach. Gifts from the organization’s Mid-Level donors will be pooled to create a year-end, matching gift solicitation to the UCS membership.

Early indications are this is a winning idea. According to Emma, “After a slow August, we blew out our September expectations and October continues to be really strong. Clearly this is performing well with our Mid-Level donors. Next, we’ll see how this concept performs with our Membership.”

Creating a More Efficient Strategy That Renews Donors While Honoring Their Giving Preferences

At CARE, Amy is leading an effort called the Anniversary Project, which is designed to renew the relatively small but very valuable group of donors who reliably give just once per year. Within this cohort, Amy and her team are doing personalized outreach to those donors who are in the top 15% of Mid-Level contributors. They are sending a handwritten note on an elegantly designed card to these donors the month prior to the 12-month anniversary of their last gift. The card includes an inspirational photograph of a partner they have worked with. A short, moving impact

story about the partner is included on the back of the card along with a QR code to make giving easy. A reply envelope is also included.

This effort only started midway through FY24, so it’s too early to know for certain what impact the approach will have. But there are a couple reasons Amy is optimistic. First, she successfully applied this strategy at a previous organization. Second, she says, “These are some of the most loyal donors I’ve ever worked with. That tells me I shouldn’t be sending multiple solicitations to these people. I don’t need to. I’m probably wasting resources by mailing them and it’s likely off-putting to these donors to receive unwanted mail.” As Amy sees it, if they can identify and respond to their donors’ giving preferences, everybody wins, and they’ll have donors for life.

Interested in Learning More Creative Approaches to Level Up Your Mid-Level Program?

Join Amy, Emma, Jo-Anna, Paul, and dozens of other colleagues from the more than 40 organizations that will be participating in the DMFA MLG Benchmarking Summit next April 29-30, 2025 in Hyattsville, MD. Attend general sessions for insights and analysis on your self-reported data, dive into deep discussions with your peers in focused breakout groups, and spend quality time meeting and networking with other nonprofit Mid-Level professionals. Visit dmfa.org/mlgbenchmarking to learn more about this one-of-a-kind event and make your plan to attend in 2025.






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California's "Platform" Law to be Revisited

Legislative Sponsor Takes Note of Challenges

Robert Tigner, The Nonprofit Alliance

Background

As far back as 2017, the California Attorney General (AG) wanted to add a new category of registrant to the charitable solicitation law. After several failed legislative efforts, AB 488, sponsored by Assemblywoman Jacqui Irwin, was enacted in the fall of 2021. Its goal is to track and oversee third-party online services connecting donors to charities.

The entities being regulated are either "charitable fundraising platforms" (think businesses like GoFundMe and Classy) or platform charities (nonprofits such as Charity Navigator or PayPal Giving Fund). The law is complex, the resulting rules are complex, and the platforms' activities are complex. The final rules were not effective until June of this year.

Notably, the law includes a requirement prohibiting a platform from sending a gift to an organization not in "good standing." An organization is not in good standing if the IRS revokes its nonprofit status, California's Franchise Tax Board (FTB) revokes its exempt status, or the AG's Registry of Charities labels it delinquent (or suspended or revoked).

The platform relies on the AG's twice-monthly updated "May Not Operate List," which contains over 125,000 entries, to accomplish the required vetting. The FTB and IRS revocation lists are straightforward and easy to access. The AG's list is more problematic. For starters, consider that the Registry will take anywhere from 30 to 90 days to process a renewal application and provides no expeditious means for registrants to ask questions or verify status.

Murphy's Law

Here is a list of things gone wrong, mostly from this year, which have come across my desk from nonprofit TNPA members:

- A nonprofit was known by the same acronym as an organization that appeared on the AG's May Not Operate List as revoked years ago. A platform notified the nonprofit that it would no longer be receiving gifts. The nonprofit then had to research the issue and *prove* the mistaken identity to the platform to reopen the gift pathway.
- A religious organization had registered with the AG some years ago and in error. It did the right thing and submitted a request to withdraw its registration since it was exempt. But through a platform, it learned it had been labeled delinquent. It then had to *prove* its status as an exempt religious organization to the platform before it could again receive gifts.
- Another religious organization had *never registered* in California due to its exempt status. A platform advised

that it was on the AG's May Not Operate List. In fact, it was not on the list. It had to pay an outside lawyer to pressure the platform for an explanation. None was forthcoming, but the platform agreed to continue allowing gifts to the organization. But who pays for the lawyer?

- Many out-of-state organizations, due to faulty advice or poor understanding of the law, register to solicit contributions with the AG, as they should, but also register with the Secretary of State and the Franchise Tax Board, *which they should not*. One organization, recognizing its FTB and SOS registrations were unnecessary, stopped paying the fees and filing the papers. As it had no reason to care, it probably never knew it had been placed on the FTB revocations list years ago. It cares now. A platform told them they were no longer eligible for gifts due to the FTB list. FTB advised its lawyer they'd have to withdraw from SOS and then FTB, a process that would take weeks or even months—all the while losing gifts from platforms.
- Many weeks after it had filed its renewal with the Registry, a member organization was notified by a platform that the AG had placed it on the May Not Operate List. The Registry says it mails letters to advise of faulty filings, but the "Delinquent" label goes promptly to the May Not Operate List. So, for such relatively trivial things as a missing page, a missing signature, or an incorrect filing fee, an organization seeking to comply with the law could miss weeks of online donations while waiting for its resubmitted renewal to be processed.

Irwin Intends Repairs

Because TNPA was among the AB 488 legislative process stakeholders, we received an email on October 21 from Brandon Bjerke, Assemblywoman Irwin's Legislative Director. The email solicits "experiences, complaints, suggestions ...," which TNPA has provided.

If you would like to discuss AB 488 issues that have emerged for you or your clients, please email me at rtigner@tnpa.org. The stakeholder process that preceded AB 488 was open and deliberative, and I expect the forthcoming "repair" process to be the same. ■





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