



Smarter Donor Engagement: Finding Growth in a More Demanding Fundraising Environment, What's Changing—and What's Not

Angela Newsom, Wiland

A Changing Engagement Landscape

The fundraising environment continues to evolve—and for many organizations, it's becoming more challenging to maintain consistent growth. Acquisition remains unpredictable, costs—particularly in direct mail—are rising, and donor expectations for relevant, personalized communication are higher than ever.

At the same time, donor behavior is fragmenting across channels. Supporters are engaging through a mix of mail, digital, and emerging platforms, making it harder to deliver a cohesive experience. The result is a growing need for more precise, data-driven engagement strategies that can adapt to both organizational constraints and donor expectations.

Revisiting the Fundraising Levers

While the environment has changed, the core levers of fundraising remain the same:

- Acquire new donors
- Increase donor value
- Improve retention
- Optimize marketing spend

What has changed is how these levers must be managed. Broad segmentation and uniform campaign strategies are no longer sufficient. Success now depends on how effectively organizations can prioritize and target the right donors with the right message, at the right time, through the right channel.

Data-driven decisioning is key. By incorporating predictive insights and behavioral signals, nonprofits can better understand which donors are most likely to respond, upgrade, or lapse—and adjust their strategies accordingly.

From Segmentation to True Personalization

Many organizations still rely on traditional personas to guide their outreach. While helpful, these approaches often fall short when it comes to execution. Today's leading strategies move beyond static segmentation toward dynamic, behavior-based personalization.

Data enrichment and cooperative data play an important role in enabling this shift. By leveraging broader datasets that include transactional behavior, channel preferences, and giving patterns, nonprofits can identify high-propensity audiences for specific campaigns.

This allows for more targeted outreach across both direct mail and digital channels. For example, some donors may respond best to coordinated, multi-channel campaigns, while others may require fewer—but more precisely timed—touchpoints. Personalization is no longer just about messaging—it's about orchestrating the entire donor experience.

Balancing Acquisition and Retention

As acquisition becomes more expensive, retention and reactivation are taking on greater importance. Retaining an existing donor is often significantly more cost-effective than acquiring a new one, placing greater emphasis on how organizations engage and steward their current supporters over time.

This shift requires a more thoughtful approach to donor engagement—one that leverages data to better understand giving patterns, channel preferences, and overall responsiveness. By applying these insights, organizations can make more informed decisions about where to focus their efforts and how to allocate resources across both retention and acquisition strategies.

At the same time, more precise acquisition approaches—such as lookalike modeling—are helping nonprofits improve efficiency by focusing on prospects who closely resemble their best donors.

Turning Insight into Action

The organizations seeing the strongest results today are those that successfully connect data to execution. Insights alone are not enough—they must be embedded into campaign strategy, channel planning, and ongoing optimization efforts.

This requires a willingness to test, learn, and refine approaches over time, as well as a shift away from legacy assumptions about donor behavior.

Looking Ahead

While challenges persist, there is significant opportunity for organizations willing to evolve. By embracing data-driven engagement, investing in personalization, and optimizing across channels, nonprofits can build stronger donor relationships and drive more sustainable results.

In today's environment, smarter engagement isn't optional—it's essential. ■■

Message from the President

"Summertime is always the best of what might be."—Charles Bowden

The Google tells me that this classic quote celebrates summer as a season of peak potential, momentum, and optimism.

We know summer also means forecasting, reforecasting, strategy sessions, and competing team vacations. At the foundation of these (except the vacation juggling) are the questions: What worked? What didn't? What do we need to change? And how?

In this issue, you'll find insights from trusted voices on emerging strategies and new tactics. We've always known change is inevitable and constant but to reach our potential and increase momentum we must make it a part of our culture and strategy. Are we now sharks, having to constantly swim to keep from drowning? (Only some sharks—but yes, we do!)

As fundraisers, we are keenly aware that there is no BAU—business as usual. We are always seeking, striving to better the donor journey, personalize the conversations, and maximize the giving relationships we are lucky enough to have with our donors and members. (Including you!)

So wherever you are this summer—beach chair, mountain cabin, or your "I'm technically OOO but still peeking at email" situation, take a few minutes and dig in. A few highlights:

Attribution—once a battle between online and offline and sometimes still is—is now rearing its troublesome head in the world of DAFs. **TrueSense** makes a compelling case for this and its impact in their article. **Lautman Maska Neill & Company** maps out a plan to analyze, and retain emergency or "surge" donors by optimizing their donor journey before the next surge arrives.

I particularly like the article by Porter Mason of **Stagecoach Digital** (and I highly recommend attending any session he gives at Bridge!).

And my one direct ask for **you** please is to visit our Member Directory at dmfa.org to make sure all your details are correct—name, email, title, and address where you'd like to receive this Newsletter. (Fear not—this address remains private and is not visible to other members! We like transparency and boundaries.)

See page 13 and check our website for more details on webinars and in-person events. It's always better when you're there.

Enjoy the issue. And if you can, enjoy a little actual summer too. (And sunscreen, please!)

Jenn Bullard

Jenn Bullard
President
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MEET THE SURGE:

Identifying, Analyzing, and Strategizing to Retain Emergency Donors

Rayna Puglisi Clarke, Lautman Maska Neill & Company

Every donor has their own unique motivations, behavior, and preferences, but no organization has the time or budget to design a unique journey for each of them. However, testing and analysis can unlock key findings and identify groups of donors who would benefit from special touchpoints or a fresh cadence.

Among these are emergency or “surge” donors—those who first give during a crisis or headline-making event—but later are treated like any other donor. This can quickly lead to higher spend and lower performance, but there are ways to keep them engaged for years to come. The answer is in the data.

After the 2016 election, one of our clients acquired a very large group of new, under-\$1,000 donors. This segment continued to grow over the next four years. However, this rapid growth and the program’s overall strong performance masked the fact that certain portions of this file were underperforming.

When we started working with them three years ago, we quickly identified that donors who were acquired online (and who had never made an offline gift) were negatively impacting the direct mail appeal program performance.

Were we only thinking about the mail channel, the solution to this issue would be simple—just stop sending these online donors direct mail appeals. However, our job is to focus on donor value and not simply channel performance. So before making that change, we worked together with the digital agency and analytics team to determine whether taking these donors out of the mail negatively impacted their overall retention.

After analysis proved that reducing this group’s mail volume didn’t hurt donor value and retention, we designed a journey just for them, determining what critical touchpoints were worth maintaining. Immediately, the organization experienced significant cost savings that we were able to invest elsewhere to deliver a stronger return.

Then, when the 2024 election brought in another surge of new, under-\$1,000 donors for our client, we were ready. Rather than throwing these new surge donors into all appeal and renewal mailings as had been done previously, we created a different journey for surge donors right from the beginning, designed to maximize their reactivation while keeping a close eye on

investment levels. Today, this new group of surge donors has yielded incredibly strong reactivation rates—because they received smart, strategic touchpoints from the moment they first signed on.

We also modeled the online-only surge donors for offline behavior, to identify those within this larger segment who were most likely to also respond to mail, for even greater retention gains.

So, the next time your organization is in the news and donors are flocking to support you, have a plan in place to identify and segment these donors, analyze them over time, and take decisive action for the overall health of your program. ■■■



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The Data Diet:

Moving Beyond the “More is Better” Mindset

Porter Mason, Stagecoach Digital

For many nonprofit organizations, the push to become more data-driven has resulted in a familiar pattern: more dashboards, more KPIs, and more reporting. The underlying assumption has always been that collecting and reviewing as much data as possible would naturally lead to better decisions.

Yet in practice, it has created more complexity than clarity. Teams find themselves reviewing dashboards and reports with an ever-growing list of metrics—open rates, impressions, clicks, conversions—without gaining insight into how their programs are performing and what, if anything, needs to change.

Collecting more data is no longer the advantage it once was. With advances in AI and automation technology, marketers no longer need to optimize campaigns manually based on granular data. Now, the advantage lies in knowing which questions to ask and which data points to focus on.

The Case for a “Data Diet”

A more efficient approach prioritizes discipline over volume—a “data diet.”

Not all data is equally valuable. When you collect too much data and review every metric regularly, instead of gaining clarity, you’re most likely becoming overwhelmed by noise. To manage and measure your unique program effectively, you must focus on the metrics that will yield the strategic insights to fuel performance.

Start with a clear set of questions. Are we on pace to meet the month’s revenue goals? How does revenue compare to this time last year? Which channels are driving new donors or sustainers? Are those donors retaining and generating long-term value?

Once these questions are clearly defined, you can select metrics based on their ability to answer them. This often requires moving beyond readily available platform metrics and investing in collecting and synthesizing data that directly links marketing activity to your bottom line: revenue, donor acquisition, and retention.

Metrics such as impressions, follower counts, or even certain engagement indicators may be easy to track, but they rarely provide a reliable basis for decision-making on their own. When these numbers dominate reporting, they can crowd out more meaningful signals.

Your data can and should nourish your program like a good meal. By combining only quality ingredients with healthy preparation, you’ll be left with a satisfying recipe for success.

From Reporting to Action

Rather than attempting to capture every available data point, organizations should begin with a concise set of headline metrics—typically four to six core indicators—supported by a

small number of trends or visualizations to create a “minimum viable dashboard.”

This structure forces prioritization. If a metric is not essential to understanding performance or guiding action, it does not belong in the core view. Additional analysis can still be done, but keep it separate from your primary dashboard. Reserve “kitchen sink” type reports for once or twice a year at most.

The impact of this shift is significant. With fewer, more meaningful signals to interpret, teams can move quickly from analysis to action. Conversations become centered on what has changed, what requires attention, and what steps to take next.

For nonprofits, where resources are limited and accountability is high, this type of data focus is invaluable. It reduces the reporting burden while increasing its usefulness—helping teams act on what ultimately impacts performance: driving revenue, growing the donor base, and strengthening long-term relationships.

Being data-driven is no longer about measuring everything. It’s about measuring what matters and using it to make better decisions. ■■■



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When Monthly Giving Becomes Identity: A Direct Response Lesson from NAMI's Table of Hope

David Sacchetti, AGP

As donor acquisition grows more competitive, direct response fundraisers are being forced to rethink a familiar question: *What are we really asking donors to join?*

That was the challenge facing the National Alliance on Mental Illness (NAMI). While the organization had a long standing monthly giving program, it no longer reflected the sense of community, belonging, and legacy at the heart of its mission. Monthly giving existed, but the program lacked a clear identity.

Rather than treating this as a problem, NAMI took a strategic approach. The sustainer program was reimagined and rebranded as *Table of Hope*, a name rooted in NAMI's history of care, support, and bringing people together around their kitchen table. The goal was not just to grow monthly donors, but to give recurring giving a purpose that donors could recognize and claim as their own.

Shifting the Role of Monthly Giving

The objective was to accelerate sustainer growth at scale while fostering deeper engagement and long-term value. To do that, the campaign reframed monthly giving from a payment structure into a shared commitment. Donors were invited to see themselves as part of an ongoing community that provides consistency and compassion to individuals and families affected by mental illness.

From a direct response standpoint, this shift matters. Sustainer acquisition often stalls when messaging centers on convenience or frequency. By defining what sustainers *stand for*, and grounding that identity in NAMI's legacy, the program moved recurring giving out of a transactional frame and into a relational one.

Scaling Storytelling Through Digital Acquisition

The Table of Hope became the foundation for a scaled digital sustainer acquisition campaign. Messaging consistently emphasized belonging, continuity, and collective impact, ensuring every solicitation reinforced why recurring support matters. Rather than separating brand storytelling from performance, acquisition efforts were built directly on that narrative.

Audience targeting focused on digital supporters already receptive to NAMI's mission, positioning monthly giving as a natural next step for those seeking a deeper relationship. Becoming a sustainer was presented not as a niche option, but as an accessible way to live out shared values.

Results and Long-Term Impact

Across four email sends, the campaign delivered 1.554 million solicitations, resulting in 222 new sustainers and 27 upgrades.

This represented a 226% increase in new sustainers compared to previous performance and generated \$108,000 in projected 12 month revenue from new and upgraded monthly commitments.

While the response rate was modest, the scale and quality of conversions drove significant long-term value. More importantly, the effort reinforced monthly giving as a meaningful, ongoing commitment rather than a one time decision.

Why This Worked

This campaign succeeded because it addressed the core challenge behind many sustainer programs: meaning. By aligning brand identity with acquisition strategy, NAMI demonstrated that growth accelerates when donors understand the purpose and community behind recurring support.

Sustainer growth isn't just an optimization challenge, it's an identity challenge. When donors know what they're joining and why it matters, performance follows. ■■



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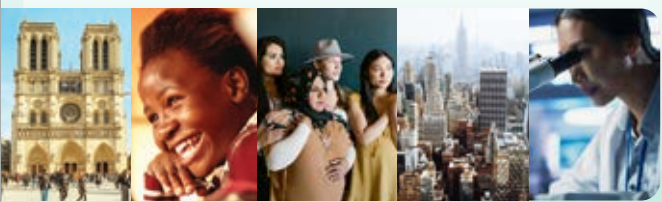
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The DAF Opportunity Direct Response Fundraisers Are Missing

Samantha Jasnos, TrueSense Marketing

Donor-advised funds (DAFs) are one of the most significant shifts in philanthropic behavior since the rise of online giving. Yet many direct response teams relegate them to planned giving or major gifts departments. This fragmentation costs nonprofits revenue.

Nearly 70% of DAF gifts fall under \$1,000, which means they're not exclusively the domain of major donors. These are gifts from your mid-level supporters, recurring donors, and acquisition prospects who happen to have opened a DAF account.

There are four key focus areas to improve your relationships with DAF donors and prospects.

THE DATA CHALLENGE

The first hurdle is visibility. Most organizations lack consistent tracking of DAF gifts across their donor database. Hard credit typically goes to the sponsoring institution, and soft credit should go to the individual donor. But without standardized procedures, your CRM likely misattributes these gifts or fails to capture them altogether. This means your models are incomplete, your retention analysis is skewed, and your segmentation strategies miss an entire donor segment.

Start by auditing how your organization currently records DAF contributions. Work with your data and finance teams to establish clear attribution rules and stick to them. Consistency matters more than perfection. Once you can reliably identify DAF donors, you can begin analyzing their lifetime value, response rates, and giving patterns separately from your general donor population.

THE FRICTION PROBLEM

Direct response professionals understand that every barrier between a donor's intent and their action decreases their likelihood to give. The traditional DAF giving process required donors to leave your website, log in to their fund provider, and complete separate forms. Many simply gave up or gave less.

Payment technology has changed this equation. Tools such as DAFpay integrate directly into your donation forms, allowing donors to complete gifts without leaving your site. But even without integrated payments, you can reduce friction immediately. Add a simple checkbox to your reply devices and digital forms stating, "I am giving through my DAF." This single addition signals that you understand this giving method and allows your team to respond appropriately.

THE MESSAGING OPPORTUNITY

Your appeals, landing pages, and thank-you sequences should reflect that DAF giving is normal and valued. Avoid treating DAF donors as exceptions. Headings such as "Support Us Through Your Donor-Advised Fund" make it clear that your nonprofit welcomes DAF donations.

Test your donor journey from a DAF donor's perspective. *How many clicks does it take to find DAF instructions on your website?* If it's more than two, you're losing motivated supporters. Review your direct mail reply devices. Are DAF options visible or buried in fine print?

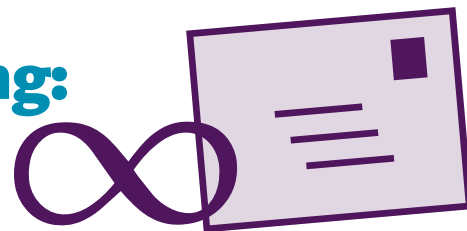
THE STEWARDSHIP EDGE

Here's where direct response teams can differentiate. DAF donors report rarely being thanked for these gifts (likely due in part to unruly data practices). A personalized thank-you note or prompt acknowledgment goes remarkably far. These donors have strong philanthropic intentions, so treating them as transactional rather than relational is a missed opportunity for increased lifetime value.

The organizations that are winning with DAFs aren't waiting for a perfect, enterprise-wide strategy. They're making incremental improvements to data tracking, website experience, and donor messaging. For direct response fundraisers, that's exactly the kind of tactical, measurable work that drives results. ■

The Power of Postal Retargeting: Closing the Loop on Intent

Lindsay Asselmeyer, Path2Response



Every day, anonymous visitors engage with your website and disappear. In the nonprofit world, these are “missed connections” individuals who were interested enough to click, but not yet ready to commit. Direct mail retargeting is a sophisticated emerging tactic that identifies these anonymous visitors and, within 24 to 48 hours, triggers a physical postcard or mailer to their home address.

Intent-Based Outreach

Unlike traditional acquisition mailings that rely on cold rented lists, postal retargeting targets individuals who have already demonstrated active intent. This isn't just a shot in the dark; it's a targeted response to a specific action. Because of this high relevancy, retargeting can be executed at a fraction of the cost of a standard direct mail campaign while still yielding high conversion rates.

In today's crowded digital landscape, a social media ad can be scrolled past, and an email can be deleted in a millisecond. A physical postcard, however, serves as a tactile, persistent reminder of your cause. Research consistently shows that direct mail evokes a stronger emotional response and higher brand recall than digital-only touches. While a postcard may typically lack the real estate to share your full story and mission, we know these recipients already have a baseline familiarity with your organization from their recent web session.

Strategic Segmentation

Successful postal retargeting isn't about sending a postcard to everyone who hits your homepage. It thrives on smart segmentation:

- ♦ **Behavioral Triggers:** Set rules to email visitors only who spent significant time on your impact page or reached the final step of the donation form before abandoning.
- ♦ **Custom Messaging:** Use identity resolution to segment visitors into prospects, active donors, and lapsed donors, delivering a unique message to each audience.

The speed of this medium is its greatest asset. Modern print-on-demand technology allows postcards to be printed and mailed almost instantly, reaching the donor while your cause is still fresh in their mind. By including a custom QR code, you bridge the digital gap, allowing the donor to return to a pre-populated donation page and enabling you to track the exact ROI of the mailer.

Privacy and Transparency

In an era of heightened privacy awareness, transparency is paramount. Direct mail retargeting uses identity resolution technology to determine the postal address associated with a

visitor's device. Nonprofits must ensure their privacy policies are up to date and provide clear opt-out options. When done correctly, the outreach feels like a warm, personal invitation rather than an intrusion.

Case Study: High-Stakes Impact

A humanitarian organization recently executed a three-month retargeting campaign during a period of high-profile news coverage. When compared to a holdout panel of visitors who did not receive mail, they saw:

- ♦ **16% increase** in overall response rate.
- ♦ **379% increase** in average gift size.
- ♦ **152% Return on Investment**, with donations totaling 3x the campaign cost.

The Bottom Line

Postal retargeting is the perfect blend of online and offline engagement: it is as data-driven as digital marketing, yet as personal and permanent as a traditional letter. By closing the loop between digital interest and the physical mailbox, organizations can turn casual browsers into lifelong supporters. ■

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The SECURE Data Act and Federal Data Privacy

Ann Hollingsworth, The Nonprofit Alliance

The Nonprofit Alliance (TNPA) has been strongly advocating for a federal data privacy bill, engaging with House Republican staff leads and providing perspectives from our members and utilizing opportunities to prioritize this issue. On April 22, the SECURE Data Act was introduced and the bill text was released. The bill text is an important step forward for the goal of federal data privacy legislation.

WHY A FEDERAL DATA PRIVACY APPROACH MATTERS FOR THE NONPROFIT SECTOR

The burdens placed on both nonprofits and their commercial partners in complying with the “patchwork quilt” of 21 individual state privacy statutes are significant. Impacts that we have been raising in policy spaces include:

- The cost of complying with various state data minimization rules is in the hundreds of thousands of dollars.
- 150-200 hours a year (with staff at various levels) to process consumer requests. This number will only grow as more states enact statutes.
- Training costs keeping the staff current on the various state rules can also run into the hundreds of thousands of dollars.

Additionally, smaller nonprofit organizations have budgetary constraints that may hinder the kinds of legal investments they can make to do legislative monitoring of state legislation. And larger nonprofit organizations that are impacted will have to make significant investments for compliance when operating in multiple states, resources that could otherwise go towards services for their communities.

FEDERAL DATA PRIVACY LEGISLATION BACKGROUND

Creation of House Data Privacy Working Group

Representative Brett Guthrie, who chairs the House Energy and Commerce Committee, established an all-Republican working group in February 2025 to create a new proposal for a federal data privacy bill. The working group concluded its public input phase on April 7, 2025, when TNPA submitted its comments, and reviewed all feedback received.

Consultation Process

The staff leads from the House Data Privacy Working Group engaged with over 200 external consultations over the last year for input and guidance, meeting with nonprofit organizations, private sector, and others. The House Data Privacy Working Group members met in-person to review updates and discuss issues. There was a focus on looking at state legislation models, looking at areas of consensus.

SECURE DATA ACT BILL TEXT:

- A **nonprofit exemption** was included;
- The **“Sensitive Data” category** included religious, immigration, sexual orientation, and other categories;
- **No Private Right of Action (PRA)**;
- **Data Privacy Impact Assessments (DPIAs)** are not required;
- **Teen Data Protection** extends stricter protections for teens (aged 13-15), treating their data as sensitive and requiring verifiable parental consent;
- **Broad Preemption**, which acts as a “ceiling” preempting most state privacy laws;
- The bill does not mandate recognition of universal **opt-out mechanisms** and calls for a 3-year study on opt-out mechanisms to consider feasibility of universal opt-out.

FEDERAL DATA PRIVACY BILL NEXT STEPS

Representative Joyce has pledged that the bill will follow regular order, meaning that we can anticipate a possible June hearing for next steps. The subcommittee markup process will be an opportunity for amendments and potential changes to the bill, possibly in June or July. House Democrats were not brought into the bill drafting process and many Democrats support a state-led approach for data privacy.

Another reminder is that this bill needs to get through the Senate. The Senate Commerce Committee, led by Chairman Cruz and Ranking Member Cantwell, is a different dynamic than the House and may have limitations on what can get out of that committee in the current political climate.

OVERALL POLITICAL DYNAMICS

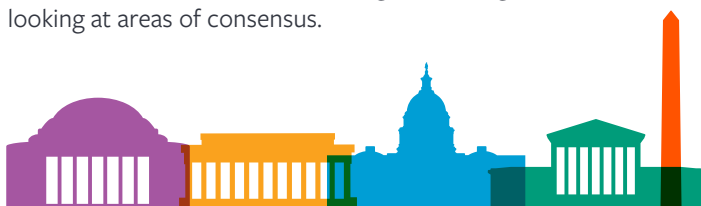
Midterm election consideration

Midterm election year dynamics influence issue areas for Congress, especially in legislation topics, hearings and investigations, and the timeline for when Congress will be in session. The first half of 2026 is when we can anticipate the bulk of the new work, as the Fiscal Year 2027 budget process has already started. Results from key state primaries are ongoing and polling will continue to shape congressional priorities, with constituents highlighting increased concerns around the cost of living and economic uncertainty. And new redistricting could reshape the congressional map. The November elections could alter the current Republican majority in the House and/or Senate, which will impact planning for the new Congress.

Bottom Line

Data privacy is no longer a niche legal issue. It is a core strategic concern for nonprofits that rely on public trust to do their work. Tracking these developments—and responding thoughtfully—will help protect your organization, your donors, and your mission in the years ahead.

To learn more, please visit The Nonprofit Alliance’s website. 





Mid-Level Giving Spotlight

Mid-Level Giving Summit 2026: A Community Rising Together

Reflections from DMFA's Professional Development Scholars and Highlights from a Record-Breaking Year

The 2026 DMFA Mid-Level Giving Summit brought together more than 120 mid-level fundraising professionals and 57 nonprofit organizations for two days of benchmarking, education, and community-building. It was the largest Summit to date—and, by all accounts, the most energizing.

In her opening remarks, **MLG Summit Co Chair Jann Schultz** set the tone for the gathering: *“Over these two days, we share one purpose: maximizing the impact of mid-level fundraising for our organizations, our donors, and the missions we serve. Benchmarking, education, and networking aren’t just our pillars—they are how we elevate the mid-level donor experience and strengthen the pipeline that fuels long-term impact.”*

That shared purpose was evident throughout the Summit’s cohort benchmarking sessions, expert-led discussions, and collaborative workshops. But perhaps the most powerful reflections came from the DMFA Professional Development Scholarship recipients, **Cheryl Bailes** and **Cari Maslow** of the National Trust for Historic Preservation. Their experience offers a window into why the Summit has become one of the most valued professional convenings in our sector.

“Hands-down, one of the best conferences I’ve ever attended.”

A Scholar’s Perspective: Cheryl Bailes, Director of Leadership Giving

For Cheryl Bailes, the Summit was more than a conference—it was a turning point.

“The Mid-Level Giving Summit is probably hands-down, one of the best, most helpful, and meaningful industry conferences I’ve ever attended. Thank you DMFA—thanks to all the organizers, volunteers, and the many hours spent planning this amazingly thoughtful, educational, and thought-provoking conference!”

The National Trust for Historic Preservation recently joined the Mid-Level Benchmarking cohort and was placed in the **Alliance** group. Cheryl quickly discovered that while organizations differed in size, structure, and resources, the shared challenges—and opportunities—were strikingly similar.

“Despite these differences, there were far more commonalities and lots to share and learn from one another. As the

conference continued, it became quite apparent that this is a real community. An amazing place (a safe place, if you will) to share ideas, pain points, wins, and more with people doing exactly what you do.”

This sense of community is at the heart of the Summit’s design. Cohort-based benchmarking allows fundraisers to compare data, discuss trends, and troubleshoot challenges with peers who understand the nuances of mid-level work. For Cheryl, the cohort conversations were among the most valuable parts of the experience.

Divide, Conquer, and Double the Learning

Cheryl attended the Summit with her supervisor, Cari Maslow—but they intentionally split up during sessions.

“I made it a point to not sit with my supervisor so we could divide and conquer, to diversify our conversations, and expand our learnings. We essentially doubled our learnings and ideas to take away and test.”

This strategy paid off. Together, they returned to the National Trust with:

- A shared action plan
- A long list of test ideas
- Samples and toolkits
- New contacts
- And a renewed sense of possibility for their mid-level program

Among the insights that resonated most:

- **Working more collaboratively with major gift officers** to strengthen discovery and pipeline movement
- **Automating stewardship touchpoints**, inspired by the Obama Foundation’s digital journeys
- **Testing donor thank-you videos**, not for immediate revenue lift but for long-term retention and relationship-building
- **Exploring DAF modeling and versioning**, especially as donor-advised funds continue to grow
- **Creative inspiration** from organizations experimenting with new formats and messaging

Cheryl also highlighted one of the Summit's most talked-about ideas: the **Bridge Program**, introduced during the closing session.

"It will be interesting to see just how many people implemented a 'Bridge Program.' I know we are anxious to try it and see if it helps lift upgrades and possible reinstatements."

"Mid-level is a destination, not a stop on the journey."

A Scholar's Perspective: Cari Maslow, Interim VP, Annual Giving & Development Services

For Cari Maslow, the Summit challenged long-held assumptions about donor behavior—starting with the donor pyramid itself.

"I'm embarrassed to say that after all these years in fundraising, I never thought to question the basic donor pyramid as the baseline of a donor journey or ask for the data behind the story."

The Summit's benchmarking data revealed what many mid-level fundraisers have long suspected: **most donors do not move up the pyramid**, and mid-level giving is often a **destination**, not a transitional phase.

"This framing will help me set realistic goals for my team and set appropriate expectations with organizational leadership."

Cari also found inspiration in:

- The **IRC's Bridge Program**, which sparked ideas for expanding the National Trust's own efforts

- The potential of **triggered digital journeys**, despite challenges with email capture
- The innovative **DAF segmentation and modeling** used by larger organizations
- The **creative approaches** shared across cohorts

But perhaps most meaningful was the opportunity to build a broader professional network.

"Most of my professional career has been spent at site-based, regional cultural organizations, so it is very useful to expand my network and learn more about what people are doing in the national space. This type of networking and discussion is just invaluable."

Looking Ahead to 2027

Cheryl and Cari both left the Summit energized, inspired, and ready to implement new ideas. And they're not alone. Across the DMFA community, organizations are already testing new ideas, refining stewardship journeys, and rethinking the donor pyramid.

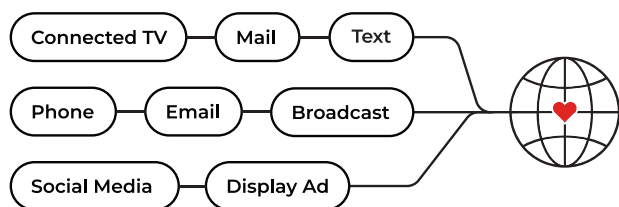
The 2027 Summit promises to build on this momentum with deeper benchmarking, expanded case studies, and even more opportunities for collaboration.

For now, the 2026 Summit stands as a testament to what makes DMFA special: a community that learns together, grows together, and lifts the profession together. 🍌





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Save the Date

JULY

- **Direct Response 101**
7/16/26 - 9:00 AM - 4:30 PM EDT
LOCATION: Epsilon, 375 Hudson Street, New York, NY
- **NYC DMFA Mini Golf Happy Hour (Following Direct Response 101)**
7/16/26 - 5:00 PM - 8:00 PM EDT
LOCATION: Puttery, 446 W. 14th Street, New York, NY

AUGUST

- **Stewardship That Pays: How Relationship-First Direct Mail Drives Long-Term Revenue at Scale**
08/06/26 - 2:00 PM - 3:00 PM EDT
LOCATION: Webinar
- **DMFA Boston Networking Reception**
08/20/26 - 5:00 PM - 7:00 PM EDT
LOCATION: Tia's Waterfront, 200 Atlantic Avenue Boston, MA

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

Log in to the **DMFA Member Hub** at dmfa.org

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- Read DMFA newsletter

Congratulations,



John Bell!

At our June 2026 Annual Membership Meeting, the DMFA honored John Bell as he embarks on his well-deserved retirement. With an incredible 24 years working with nonprofits at MMI Direct and 16 years serving the DMFA as a board member, John has left an indelible mark on direct response fundraising.

Former DMFA President Joe Gomez put it best: *"Industries don't grow on their own. They grow because people like John show up, roll up their sleeves, and care. John has been a true leader in this industry, a trusted colleague, and a friend to so many."*

From all of us at the DMFA, congratulations John! You'll be very missed on the board, but we hope you'll still pop by occasionally to crack some jokes and show off your newest Hawaiian shirt. 🌴

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.

If you fit into one of the above categories and want to further your career with a conference, webinar, or membership, apply here:

dmfa.org/awards/prof-dev-fund



OVERALL WINNER AND DIRECT MAIL ACQUISITION:
We're Not Moving to Canada, American Civil Liberties Union/Lautman Maska Neill & Company

DIGITAL APPEAL/RENEWAL
FY25 Spring Membership Drive, Cornell Lab of Ornithology/Concord Direct

DIGITAL, PAID MEDIA & OUTREACH ACQUISITION
From Shutdown to Support: Feeding Children When SNAP Was at Risk, Share Our Strength—No Kid Hungry/Further

DIRECT MAIL APPEAL/RENEWAL
IRC DAF Appeal, International Rescue Committee/The Harrington Agency



Overall Winner AND Direct Mail Acquisition: We're Not Moving to Canada, American Civil Liberties Union/Lautman Maska Neill & Company

DIRECT MAIL MID-LEVEL APPEAL/RENEWAL
Red Pandas & the Eastern Himalayas Appeal, World Wildlife Fund/Newport ONE

MULTICHANNEL
Lives on the Line—Funding Crisis Appeal, International Rescue Committee/Faircom New York

STEWARDSHIP
Who Will You End Cancer For? UT MD Anderson Cancer Center/MissionWired

SUSTAINER FUNDRAISING
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