

# Master These Two Essential Elements to Build Stronger Donor Relationships

Jennifer Bielat, Pursuant

Are you tired of constantly chasing after new donors? What if we told you the secret to the long-term success of your cause lies in cultivating relationships with recurring donors? These consistent supporters are the backbone of your organization, providing predictable funding that can see you through thick and thin.

But how do you attract and retain these crucial monthly donors? It all comes down to two key elements: community and communication.

## Community That Connects

When like-minded individuals come together as part of a movement, something magical happens. A sense of shared purpose takes hold, building powerful relationships among the members of this community. And as you communicate the value of your cause and its impact, these dedicated donors become more than just supporters—they become ambassadors, recruiting others to join the movement.

Leaning on recurring donors yields a community poised for long-term support. Your organization benefits in three ways:

1. You'll raise more money—boosting donor retention by 10% can equal a 200% increase in lifetime donor value.
2. It adds stability and predictability to your organization.
3. Staff can focus on building relationships with donors.

Whether your monthly giving program is new or thriving, there are a few ways to strengthen your relationship with this community:

**Integrate recurring donor recruitment into existing fundraising appeals.** Consider A/B testing “recurring” as a default selection on donation forms.

**Illustrate the power of small donations over time.** Coach fundraising staff to pair small, regular giving with the bigger picture, so new donors can realize their impact.

**Make your donor the “hero.”** Paint a vivid picture of the direct impact the donor can make with their gift.

**Highlight their peers.** Testimonials from other donors and volunteers will drive home the difference they're making.

## Donor-Centric Communication That Converts

Many organizations make the mistake of making themselves the hero of the story—“We need this,” “We did that.” But by shifting the tone to be more donor-centric, you'll psychologically weave a tighter connection between the donor's generosity and your organization's outcomes.

For example, Food for the Poor (FFTP) created a newsletter in which every story was about what a donor had achieved. The organization also eliminated the word “help” from its copy:

- Old: Thank you for helping us do this.
- New: Thank you for building homes.


The result was staggering. Where the old newsletter netted \$500,000, the new one netted \$1.3 million. This change reflects the core reason donors give: *to feel good about giving.*

Nonprofits must recognize that their communications have two goals: to inspire giving to their organization and to make donors feel good. Use these tips to ensure your messaging meets these goals:

- Survey your donors to ask why they give. Ask questions that elicit stories, not short answers.
- Personalize everything. Showing donors that you know them is critical.
- Give recurring donors exclusive opportunities to feel connected to your organization.
- Send timely thank you's that clearly communicate the impact of their gift.

## Community and Communication Work Hand-in-Hand

Community and communication can clearly illustrate the donor's stake in your organization. This forges a strong bond to your cause that leads to long-term support and stability for you and makes donors feel good about their gift.

At the end of the day, we all want to know we've made a difference in someone else's life. In this digital and data-driven time, don't forget to look for opportunities to create meaningful connections—friendships, really—with those who care about your cause as much as you do. After all, the word “philanthropy” literally means “loving people.” That's what building relationships is all about. 



# Message from the President

Hello Friends and Fellow Members,  
I hope this newsletter finds you well!

This edition's theme is all about relationships—something that's very important to us as fundraisers. Whether it's with our donors, our partners or our peers, we're constantly looking to create and strengthen relationships.

As Cindy Kilgore from Concord Direct so eloquently put it in her article **From Conflict to Collaboration: An Agency's Perspective**, "Relationships are all about being connected, and in fundraising, we all have one strong connection: Everyone wants to advance the work of the organizations and do as much good in the world as possible. That's something worth rallying around!"

At the DMFA, we're also in the business of relationships. I'm proud to say that through the relationships built at the DMFA, we have been able to further our mission to enhance the skills, knowledge and expertise of professional fundraisers. This year we:

- Hosted our first-ever Mid-Level Giving Benchmarking Summit, where 88 members gathered over two days to share data and strategies for building stronger mid-level relationships.
- Are home to 873 members, who are able to strengthen industry relationships through their connections at the DMFA



— Continued to host virtual and in-person programming to connect members and brainstorm ideas. Be sure to keep an eye on our calendar for upcoming dates.

Finally, I can't help but acknowledge all the relationships I've built through my time serving as your president. These past two years have been a true joy—and wouldn't have been possible without the support of the board, volunteers, members and sponsors who have paved the way before me.

Thank you to everyone who supports this organization and makes it such a special place to be. I will miss serving as your president, but I am looking forward to staying involved in the coming years.

Keep in touch!

Thank you again,

A handwritten signature in black ink that reads "Cara Marinelli".

Cara Marinelli  
President, DMFA  
cmarinelli@rkdgroup.com

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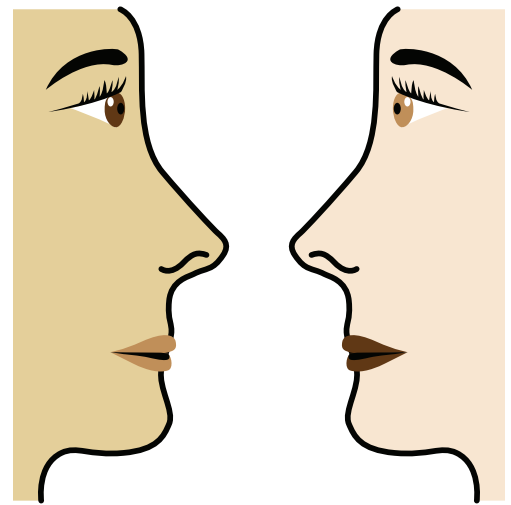
# Relationships. They're the worst!

Dennis Lonergan, *Eidolon Communications*

Relationships. So many expectations, annoyances, and demands. So much blabbing, scapegoating, and excuse-making.


Or is it just me?


I'll admit relationships aren't my forte. They are unavoidable. Decades of retreat have done little to stop them. So, I've been forced to come to terms. Herewith, a few hard-learned lessons.




## 1. Act “as if.”


You already do this at parties and family gatherings. Now, apply it to meetings and Zoom calls.


 **Listen.** Pay attention. Maintain eye contact. Smile appropriately. We all want to feel our time and talk matters. Focus on the conversation at hand. Sit on your hands and defy scrolling. What's wanted? How can you assist? Work to understand, then reiterate how you'll help and when.


 **Make Time.** Let people know they matter to you. Be available—on their terms as much as possible. Your time is valuable, acknowledge its value to others by sharing it willingly.

 **Say Yes.** Even when you don't want to. Pay it forward by saying yes whenever possible.


## 2. Beat them to it.


 **Don't wait to be asked.** Have you agreed to a deadline? Check in ahead of time to let them know you're on track. Rather than leaving someone wondering if you'll follow through with a favor, tell them where it stands. You may buy yourself extra time and goodwill.


 **Follow-through, always.** We're only as good as our word. The promise you made: did you write it down, add it to your to-do list, or give it a deadline? If someone doesn't circle back, don't think the pledge was forgotten or unimportant.

 **Extend an invitation.** Nothing lifts the spirits like being invited to lunch or dinner. From the office newbie to the client who's moved on, people like to be thought of. Make it a point to reach out. Wave over someone who is standing alone. Pull out a chair from your table. Relationships need your attention.


## 3. Honesty is the only policy.


 **Give candid feedback.** Honest feedback is essential in an industry as demanding as ours. Be transparent. Acknowledge the effort but offer suggestions to improve. If you weren't clear about your needs, own it. Set colleagues up for success.


 **Own up to errors.** Acknowledge your mistakes. We all make them. Set a tone of sincerity; it's the only way to build trust. Admit if you're at fault and identify what should have been done differently. If you're running late, let folks know. If you're missing information or can't deliver what you thought you could—be up-front about it for your sake and theirs.


 **Say no.** It's great to give the answer they're hoping for. But sometimes you're not the right person, or the ask doesn't fit. If you can't say no in the moment, ask to think about it. If you can't do it, think of someone who can. Your only obligation is to do the right thing, thoughtfully.

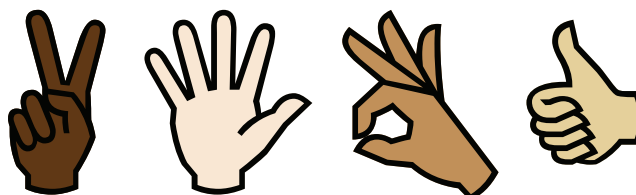
## 4. Random acts of kindness.

 **Send that birthday, congratulations, or bereavement card.** Try to use pen and ink. It's the essence of our business, and the gesture will be remembered.

 **Apologize.** If you had to cancel, failed to deliver, said something unwise, or simply weren't your best self, tell the person on the other end that you regret it and understand the consequences. Be heartfelt and write that extra sentence to really make it land.

 **Say “Thank you.”** Even if all someone did was expected, expressing thanks—in more than a perfunctory way—is a low-cost way to make someone feel like a million.

Maybe I'm not so bad at relationships after all! Each one is an opportunity to be your best self, and we can all use more of those. 





# Active listening is the key to building a stronger culture



Max Bunch, RKD Group

Construction on the renowned Notre Dame cathedral in Paris started in 1163. It took more than a century for this medieval masterpiece—with its flying buttresses, stained-glass rose windows and landmark spire—to be completed.

On April 15, 2019, Notre Dame caught on fire. In a matter of hours, much of the roof had collapsed, priceless artwork had been destroyed, and the famed spire had toppled over.

The point here is that building something great takes time, but it can fall apart quickly if you're not paying attention.

In the last decade or so, business leaders across industries have focused on tearing down silos between teams to foster greater collaboration. To build camaraderie. To improve communication.

But tearing down silos is just the first step toward those goals. In order to truly be successful, we must also build a culture of active listening.

## What is active listening?

Active listening is a way of hearing and responding to another person that improves mutual understanding.

It's about being present. It's about showing active interest and engagement in the dialogue. It's about listening to truly understand—not simply waiting your turn to respond.

Never has this been more critical than in today's world of remote work and virtual meetings.

How many times have you been on a Zoom call in which people were looking at something off camera or typing on their computer? You've probably been guilty of this yourself—I know I have.

Think about the result: The person speaking now feels disrespected. They're clearly less important than whatever you were doing on the side.

If you truly want to improve your culture, you must foster stronger relationships among employees. The bedrock of any strong relationship is respect. And one bad listening experience can crumble all the work you've done to build a relationship.

## How do we practice active listening in business?

And how do we foster a culture of respect? Here are some key steps to implement:

- 1. Be humble.** This is Step 1 for a reason. The goals of active listening are to learn, understand and resolve. You can't accomplish these if you think you know it all.
- 2. Listen with your eyes.** It seems simple, and it is. Look at the person speaking to you and give them your full attention.
- 3. Fight the urge to relate.** Often when we hear a similar experience, we want to jump in and share our story. The problem is that we've now interrupted the other person. Hold your story in and let them finish.
- 4. Ask questions that follow a journey.** As the speaker relates a story to you, dig deeper into it through questions. Be the bridge that helps their story reach its conclusion.
- 5. Take notes.** This might seem to conflict with Step 2, but a healthy balance is OK. You can pay attention to the speaker and occasionally jot down an important note. This will help in Step 6.
- 6. Reflect, link and respond.** Once the person finishes, you can now interject. But don't make it about you. Reflect on their story and repeat what you heard to expand your understanding.

When everyone within your organization begins practicing active listening, the results can be astounding.

Active listening promotes thoughtful decisions. It reduces anxiety. It helps you lead with empathy. This leads to improved employee retention and stronger external partnerships.

Just don't expect these results overnight. Transforming your culture into one of active listening is hard. It's a commitment.

Remember: Building something great takes time and continued attention. 🍌



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# From Conflict to Collaboration: An Agency's Perspective

**Cindy Kilgore, Concord Direct**

Anyone who has spent much time in this field knows one thing for sure: direct response fundraising is all about building relationships.

Sure, it's imperative that a nonprofit creates meaningful relationships with supporters. But perhaps even more importantly, relationships within the organization, as well as with agency partners, must be strong in order to move beyond conflict to collaboration and success.

Our usual point of contact is in development, but we also engage with other teams along the way. That gives us a front-row seat to some complex relationship dynamics.

When everyone works together, the magic happens: there's unwavering buy-in, feedback is early and constructive, approvals are on time, campaigns launch flawlessly, and we achieve breakthrough results. That's living the dream!

But if we're being completely honest, it's rarely the reality. While a high level of collaboration is ideal, it can be tough to pull off—and disruptive to progress—when everyone brings very different priorities.

Here are a number of common conflict areas and ways we've overcome them.

**CONTENT:** Content that most effectively motivates donors can ruffle feathers with communications teammates whose priority is ensuring the brand is represented well; they might push to omit negative angles or details. Programs might struggle with equivalencies or statistics that prove impact. Major giving officers might not confirm a match in time. An agency partner should stay attuned to these potential obstacles from the start and guide teams with resource discussions, written content requests, help with interviews, and even solid back up plans and contingencies.

**DATA:** With operations needing consistency and predictability, new campaign elements can be a big deal. Creative direct mail replies, new donation forms, data-driven content, testing, and reporting requirements can stress them out. Agency partners should be vigilant with data and caging requirements for direct mail, as well as digital data needs, from the start. Development teams should earmark key times for operations to review the campaign.

**MULTIPLE AGENCIES:** These days, various agencies often handle different things for one organization, making it difficult for the development director to drive cohesion and integration. Agency partners should be willing to work together as requested, whether that's participating in quarterly updates, brainstorming for strategic planning, or attending an annual gathering to serve as a think tank for the benefit of the organization.

**ATTRIBUTION:** When separate managers of direct mail and digital channels are responsible for proving success, it can lead to struggles over gift attribution or—worse yet—reduced

integration opportunities. This can impede donor journeys and negatively impact overall performance, since donor engagement across channels is very valuable. Organizations should work with partners to establish holistic metrics of success and foster a culture that focuses on the importance of each channel along the way, not individual channel strength for donor conversion.

**INNOVATION:** Innovation sounds exciting, but it can be tricky (or even terrifying) to tackle in the midst of a busy campaign schedule. So much of fundraising relies on the tried-and-true or incremental testing, making it tough to prioritize innovation. Agencies should create a way to explore breakthrough ideas outside of established efforts, ideally in advance of budgeting. Having all teams provide thoughtful feedback will further break down silos and increase the likelihood of successful implementation down the road.

Collaboration is an ongoing process. Everyone involved needs to recognize why conflict happens, align to eliminate it, and ensure the program is improving.

After all, relationships are all about being connected, and in fundraising we all have one strong connection: everyone wants to advance the work of the organization and do as much good in the world as possible. That's something worth rallying around! 🌈



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# How *long-term relationships* with corporate partners and their employees can lead to *sustained fundraising growth*.

## Bonterra

Your segmented donor emails are scheduled, annual appeals mapped out, and a full calendar of social posts are teed up—all with the goal to engage new supporters. But have you checked in with your corporate partners recently?

Often, nonprofits ask corporate partners for financial support during a large event or initiative. While these types of sponsorships are incredibly beneficial in the short term, you could miss out on the long-term support they can provide for your organization through programs outside of sponsorships by not stewarding those relationships year-round.

Companies adopt corporate social responsibility (CSR) programs to connect their operations and employees to community causes. One component of a CSR program is an employee giving program in which companies encourage employees to give back to nonprofits through donations, volunteering, and other acts of kindness. To incentivize employees to participate, employers will commonly match these contributions with additional funds.

According to Double the Donations, over 26 million individuals work for companies with a matching gift program, and an estimated \$2 billion to \$3 billion is donated through these programs annually. However, an estimated \$4 billion to \$7 billion in matching gift funds go unclaimed every year.

These findings present an incredible opportunity for your organization to create sustained relationships with corporate partners and connect with the growing number of employees eager to support a cause like yours.

## Communication is key to any successful relationship.

When building a long-term and sustaining relationship with your corporate partners, communicate with them clearly and often. Consider articulating your organization's ask in these ways:

- **Ensure that the corporate partner knows your mission, values, and needs.** Provide collateral or resources that help the employer speak knowledgeably about your organization.
- **Give regular updates so the corporate partner and its employees can see their impact.** Knowing that this partnership has already yielded tangible results will encourage the company and its employees to continue supporting your cause.
- **Initiate conversations with your business partners to find opportunities for a day of giving or volunteering.** Identify ways to collaborate with your partners that encourage active participation in your mission.

## Just remember, relationships aren't one-sided.

When engaging in long-term relationships with corporate partners, it's important to understand how your organization can help them encourage employee engagement, bring visibility to their impact, and serve as a liaison to the community. Consider offering support to your corporate partners in these ways:

- **Work with your corporate partners to ensure your nonprofit is easily searchable within the company's CSR dashboard.** Employees will be more inclined to donate if they can do so through their workplace giving program. Better yet, utilize technology that makes it easy for your business partner's employees to recognize a match. Increase the likelihood of an employee submitting a match request when they give directly through your nonprofit's site.
- **Highlight partner impact externally.** The best way to steward any partner is by simply thanking them. Showcase your corporate partner's impact by including their contributions in an annual report, through social media, and blogs. This can benefit the company's recruitment practices by attracting new employees with a vested interest in social good.
- **Provide insights into community needs and identify additional opportunities for business partners to understand the nonprofit sector.** Companies with CSR programs actively try to assess where their efforts are needed most within the community. Your organization can help facilitate connections to other cause areas to support.

Take time today to connect with your corporate partners and explore ways to grow a mutually beneficial relationship that drives more impact throughout your community. ■■

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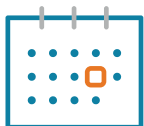
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# Save the Date

## JULY

### WEBINAR

- 07/27/23, 1:00 PM - 2:00 PM (EST)  
**Harnessing the Power of Giving from Donor Advised Fund**

### SPEAKERS:

Jackie Libby, Senior Vice President & Director of Client Services, Avalon Consulting Group;  
Colleen Morith, Assistant Director, Smithsonian Giving Circles, Friends of the Smithsonian

## AUGUST

### WEBINAR

- 08/17/23, 1:00 PM - 2:00 PM (EST)  
**Mid & Major Donors: How to Adapt to Shifting Donor Behavior**

### SPEAKERS:

Ryan Carpenter, VP Client Success, Pursuant GivingDNA; Jamie Hartman Spiva, Chief Development Officer, Houston SPCA

### WEBINAR

- 08/29/23, 1:00 PM - 2:00 PM (EST)  
**Love the Ones You're With: Advertising for Retention**

### SPEAKERS:

Matt Derby, Senior Vice President, Digital Advertising, M+R; Megan Quellhorst, Senior Digital Campaign Manager, NRDC

## SEPTEMBER

### WEBINAR

- 09/14/23, 1:00 PM - 2:00 PM (EST)  
**Integrating Legacy Touchpoints Throughout the Donor Journey**

### SPEAKERS:

Tracy Malloy-Curtis, JD, Vice President, Legacy Giving, Mal Warwick Donordigital;  
Amanda Krauss, Director of Legacy and Tribute Gifts, Sempervirens Fund

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To better serve you, we've officially closed our LinkedIn group and have transitioned to a new company page: [www.linkedin.com/company/74004924](https://www.linkedin.com/company/74004924). This is where you'll find all the DMFA updates you'll need, and they will now be easy to share in your feed! Just visit the URL and click on "Follow."

## DMFA Scholarship 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 Scholarship 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/dmfa-scholarship-fund](https://dmfa.org/awards/dmfa-scholarship-fund)





## Combat fundraiser turnover by making their job easier, and more fun!

In this day and age, it's hard to attract and retain fundraiser talent. **We get it.**

With so much to do and so little time, it's easy for fundraisers to feel burnt out. To retain top talent, it's important to understand your employees' pain points and support them in the best way possible.

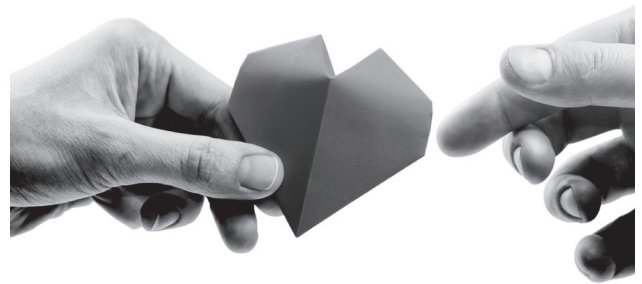
This step-by-step guide sheds light on ways to leverage your fundraising toolkit to free up your team's time, giving them the space and mental clarity to nurture their donor pipeline and get results.

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## EMERGING LEADER SPOTLIGHT

### Rayna Clarke

When family and friends ask Julia Warnock how she likes her job as an Account Executive at Lautman Maska Neill & Company, she always tells them: “It feels good to do good!”

Julia counts herself lucky that she grew up around people who encouraged her to dedicate her time to causes she cared about—from weekends volunteering at the Ronald McDonald House in her home state of Maine, to her support today of local D.C. nonprofit S.O.M.E. (So Others Might Eat).

Though the progression from years of volunteering to a career working with nonprofits might seem clear cut, Julia says, “My path into the direct response world was admittedly a bit random! In 2021, I was seeking new job opportunities and came across a listing for a Junior Account Executive role at Lautman. Two and a half years later, I am still at Lautman and couldn’t be happier.”

Now an Account Executive, Julia supports integrated fundraising campaigns for the ACLU, Chesapeake Bay Foundation, Parkinson’s Foundation, Telecom Pioneers, and the Marine Corps Heritage Foundation. In January, she spoke on a career panel for the DMAW Education Foundation’s Professors Institute.

Marie Kosanovich, Vice President, Accounts at Lautman, can’t say enough good things about Julia: “She really is just so excellent at what she does. Julia is proactive and independent, her clients love her, and she never seems to be rattled or let things get to her.”

No matter how unflappable she may seem, Julia admits to feeling nerves every once in a while—like her first time presenting on

## Julia Warnock

Account Executive at Lautman  
Maska Neill & Company



campaign performance for a client. “I had practiced extensively with a colleague, but I was so nervous going into the meeting! Afterward, the positive feedback I received gave me the confidence to talk about results moving forward.”

Julia is enthusiastic about helping other young professionals dive into direct response and joined Lautman’s welcome committee in January 2022. She tells new members of the team: “Take your work one day at a time! With multiple campaigns moving forward at once, each with many different deadlines and requirements, you have to be flexible.”

Julia also credits networking and professional development events for helping her grow into her role: “From attending DM 101 to industry happy hours to the Bridge Conference, it’s been wonderful to learn from others about their experience in direct marketing and hear advice about how I can succeed in the industry. I love seeing familiar faces at every event!”

In addition, she cites her constant friendliness as a huge factor in succeeding in direct response fundraising—from effective communication to building strong relationships with her nonprofit clients.

If you see Julia at an upcoming DMFA or other industry event, make sure to say hello—though given how outgoing she is, she’ll probably beat you to it. 🍌



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### 2023 DMFA Awards Overall Winner:

***Don't Let Them Fade Away*** (Stagecoach Digital / Wildlife Conservation Society)

### Direct Mail Acquisition:

FIRST PLACE: ***Heifer International Love Your Neighbor Christmas Package Test*** (Lautman Masko Neill and Company / Heifer International)

RUNNER UP: ***AFA September 2022 Punch Out Plane Acquisition*** (K2D Strategies / Air & Space Forces Association)

### Direct Mail Renewal:

FIRST PLACE TIE: ***National Audubon Society Annualized Renewal 1*** (O'Brien Garrett / National Audubon Society) & ***MSF-USA Refugee Appeal*** (Lautman Masko Neill and Company / Médecins Sans Frontières USA)

### Direct Mail Mid-Level:

FIRST PLACE: ***Leaders Circle Ren 4-Year End Campaign*** (DaVinici Direct / MSPCA)

RUNNER UP: ***Annual Fall Mid-level Appeal*** (Sanky Communications / Planned Parenthood of Greater NY)

### Digital Acquisition:

FIRST PLACE: ***Don't Let Them Fade Away*** (Stagecoach Digital / Wildlife Conservation Society)

RUNNER UP: ***Seattle Children's Paid Search Acquisition*** (TrueSense Marketing / Seattle Children's Hospital)

### Digital Renewal:

FIRST PLACE: ***Audubon's Annual Offer Year-End Campaign*** (Stagecoach Digital / Audubon)

RUNNER UP: ***HRC Year-End Campaign*** (Lautman Masko Neill and Company / Human Rights Campaign)

### Multichannel:

FIRST PLACE: ***Ukraine Emergency Response*** (CDR / Lutheran World Relief)

RUNNER UP TIE: ***Renewal DM + Text Test*** (Avalon Consulting / Friends of the Smithsonian) & ***Ukraine Rapid Response*** (Sanky Communications / Episcopal Relief & Development (ERD))

### Stewardship:

FIRST PLACE TIE: ***Pick Your Favorite*** (MarkeTeam / League of Women Voters) & ***The Entertainment Community Fund Stewardship Package*** (Lautman Masko Neill & Company / The Entertainment Community Fund)



# Trust and Verify

## The Nonprofit Alliance Ethics Committee

Indiana University's Lilly Family School of Philanthropy just released its study called What Americans Think about Philanthropy and Nonprofits.

Good news! In its research, it found that nonprofits were the most trusted American institutions.

Bad news! This is like the “More Trusted than Bernie Madoff” awards; one doesn’t need to be a paragon to win.

Specifically, 39% of Americans say they completely or “very much” trust nonprofits to do what’s right. This looks good against the 20% for small businesses, 14% for the president, or 6% for Congress or large corporations. But it still means that three out of every five Americans don’t trust nonprofits very much.

Similarly, only 17% of Americans think nonprofits are on the right track and only 14% have a great deal of confidence in nonprofits’ abilities to solve societal problems. Again, this is the most of any institution and still abysmally low.

We know that trust is a necessary condition for people choosing to donate so these numbers affect all our organizations. Moreover, these numbers are colored by the coverage of a few bad actors in cases that are news because they are the exception.

When nonprofits accept donations from sexual harassers or opioid peddlers, that’s unethical. And it hurts us all.

When fundraisers accept percentage-based compensation from charities that are little more than a P.O. Box and a name with a false veneer of respectability, that’s unethical. And it hurts us all.

When there’s a data breach and the response is to try to lift the rug and sweep it under, that’s unethical. And it hurts us all.

It’s more than just that when you lie down with dogs, you get fleas. It’s that every other great organization also gets fleas-by-association.

And at the same time as there is increased focus on data privacy by individuals and related interest by our representatives, we can’t afford to have even one flea. A dizzying patchwork of state-by-state legislation that makes mandatory in one state what is unacceptable in another can kill the ways we communicate effectively with our donors. That endangers all our missions.

Thus, it’s vitally important to have your own organizational ethical standards. It’s equally important to make sure your partners have similar standards and live by them.

This means reading the whole contract to make sure that paragraph 18, subparagraph b doesn’t secretly involve what your “partner” can do with your data. It’s checking references and doing research and miring in details that 99% of the time will turn up nothing beyond that people are who they say they are.



In short, compliance is boring. But it’s significantly better than being the wrong kind of exciting—the “Lesley Stahl is on line two” kind of exciting.

As a sector, we also need to have the resources to know what we should ask for and, in fact, demand from our partnerships, whether that’s transparency, privacy, accountability, ethics, or maximizing efficiency using industry standards.

That’s why The Nonprofit Alliance has an Ethics Committee that is working to create an industry standard of how nonprofits and their partners should conduct business, with particular emphasis on the acquisition and use of constituent information. These should be basic rules of conduct by which everyone can live. They should be standards that are visible to our membership and that we commit to as nonprofits and partners.

Moreover, they should be standards that hold us up as a sector worth supporting. We represent the most trusted organizations in the United States. We need to show the American people that trust is not misplaced. 🏳️‍🌈

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# Mid-Level Success Requires Multi-Faceted Relationship Building

Jeff Muller, Crossroads Insights

Bridging between low-dollar annual and major giving—and being a key feeder for planned giving—mid-level programs play an essential role in the philanthropic ecosystem. Yet occupying this nexus of the various individual giving programs creates unique relational opportunities and challenges for mid-level teams, a theme recently explored in conversation with three expert practitioners: Colleen Morith of the Smithsonian Institution, Ishmam Rahman of the International Rescue Committee, and Andrew Wiley of the World Wildlife Fund.

The discussion centered on the core challenge for any mid-level program: **how do you cost-effectively create the feeling of a high touch relationship with donors who aren't yet giving enough to warrant dedicated relationship managers?** One thing was clear. This requires a variety of approaches, including deploying a strategic and personalized direct response program, leveraging vendor and volunteer capacities, and utilizing a modest amount of traditional relationship management tactics. Below are some of the key recommendations that emerged.

## Practice Active Listening

Organizations that actively listen to their donors create stronger relationships and can better align their efforts with donor expectations. There are various ways to accomplish this, including through one-on-one interactions, focus groups, and even gathering feedback from telemarketing efforts. In the case of WWF, Andrew shared that “we have conducted periodic mid-level donor surveys that provide so much rich information. They've helped us identify people who are interested in deeper engagement while augmenting our understanding of what donors are looking for.”

## Create the “Surround Sound” Effect

“There are many ways to reach out to mid-level donors,” said Ishmam, “but if they're not in the right place, or don't have time to respond, they're not going to. That's why it's important to create a ‘surround sound’ effect.” This multifaceted approach involves utilizing various channels, including phone calls, texts, handwritten notes, emails, and acknowledgments, to engage donors from different angles. By saturating the donor's experience with multiple touchpoints, organizations increase the chances of capturing donors' attention and fostering deeper connections.

## Leverage Your Volunteers

One thing is clear: personalization and human connection are essential in mid-level programs. Colleen shared one way the Smithsonian achieves this using volunteers. “We have within the mid-level a group of volunteers who do new member outreach. Each month, they send hand-written note cards to new donors who are in either their third or ninth month of membership.” Not only does this make the recipients feel valued and appreciated, but it also provides the volunteers with a greater connection to the life of the organization.

## Timeliness Matters

One key piece of establishing effective donor relationships is how organizations communicate impact, bringing the donors into the mission and understanding their role as change agents. At organizations like the IRC—which are known for emergency response—Ishmam shared that “timing may be the biggest factor. Whenever an emergency or disaster happens, how quickly we communicate our response really affects how donors perceive that their money is making an impact.” Timeliness in communication underscores the organization's commitment to addressing pressing issues and strengthens the connection between donors and the cause.

## Internal Collaboration is Essential

Given the unique space occupied by mid-level donors, building strong internal relationships is crucial for the success of mid-level programs. Andrew pointed out that “because mid-level programs often don't have all the dedicated capacities required for success, we must leverage relationships with other teams who have complementary resources. In the end, the donor and the donor experience are collectively our North Star. When all the teams are supporting each other, it makes the donor's experience more rewarding, which creates the conditions for more meaningful gifts in the future.” Establishing working groups, fostering trust, and promoting transparency can all contribute to a culture of accountability and shared mission.

## Cultivate Leadership Support

Building a strong relationship with leadership is paramount for the success of collaborative efforts, as Colleen highlighted. “When our Assistant Secretary started, we met with him and brought in our direct marketing firm to make sure he understood the importance of membership, including our mid-level program, and how it worked. Now, he's a huge champion.” This kind of endorsement from leadership not only fosters understanding but also facilitates smooth collaboration and alignment of objectives. Ultimately, a culture of collaboration championed by leaders allows for efficient teamwork, enhanced communication, and the realization of shared objectives. ■





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# Celebrating the Power of Human Connection:

## Reflections on Employee Appreciation Week at Production Solutions

**Sadaf Lee, Human Resources Business Partner for Production Solutions**

In an era dominated by virtual interactions, the value of genuine social connections has become increasingly apparent. At Production Solutions, we understand the importance of fostering meaningful relationships and celebrating the power of human connection. Recently, we dedicated an entire week to Employee Appreciation, allowing us to rediscover the essence of our organization and honor the exceptional individuals who drive its success.

### Navigating Unprecedented Challenges

The past few years have presented our industry with a series of unprecedented challenges, stemming primarily from the ongoing pandemic. Supply chain disruptions, constant uncertainty, and the isolation experienced in our daily lives and work environments have all tested our resilience. As the familiar sights and sounds of our workspaces faded away, we realized the significance of genuine social interaction and the need to bring our team together.

### A Transformational Experience

Employee Appreciation Week at Production Solutions proved to be an extraordinary experience that will remain etched in our memories for years to come. The hallways echoed with laughter, conversations flowed freely, and barriers between departments dissolved as we engaged in cross-departmental activities. This week offered us the opportunity to see one another beyond our job titles, revealing the beautiful tapestry of personalities that makes our team truly unique. It was a time of genuine connection, reminding us of the value of human interaction.


Employee Appreciation Week served as a powerful reminder of the significance of genuine social connections.

### Fostering Bonds and Celebrating Contributions

Throughout the week, we engaged in team-building exercises, shared meals, and had heartfelt conversations. These experiences allowed us to forge stronger bonds that will enhance collaboration and mutual support within our organization. We developed a deeper appreciation for the diverse talents and contributions each team member brings to the table. Employee Appreciation Week served as a heartfelt tribute, recognizing that our team's efforts go beyond their assigned tasks and responsibilities. We express gratitude to every individual for their dedication and hard work, as they are the driving force behind Production Solutions' success.

### A Culture of Connection and Collaboration

Moving forward, we are committed to nurturing a work culture built on human connection, collaboration, and mutual support, whether in person or from a distance. By celebrating the unique talents and perspectives within our team, we can create a more vibrant and fulfilling work environment where everyone thrives. The power of human connection will remain a top priority as we foster a culture that values collaboration, empathy, and mutual respect. Each individual at Production Solutions deserves an environment where they feel seen, appreciated, and empowered to bring their best selves to work.

In conclusion, Employee Appreciation Week at Production Solutions served as a powerful reminder of the significance of genuine social connections. It allowed us to rediscover our organization's essence and celebrate the exceptional individuals who contribute to its success. As we move forward, we remain committed to fostering a culture that prioritizes the power of human connection and creates a thriving work environment for all. 





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