



Direct Mail Annual Calendar: Planning Ahead to Maximize Results

by
Shawnda Lembke
Vice President & Principal Consultant
C.I. Partners Direct, Inc.

WE DEVELOP DONORS™

INSIGHTFUL GUIDANCE | SOLUTIONS DRIVEN CAMPAIGNS | FANTASTIC RESULTS

Direct Mail Annual Calendar: Planning Ahead to Maximize Results

Introduction

Success in direct mail fundraising does not happen by accident. Nonprofits that get the most out of this medium have at least one thing in common: they approach direct mail as a year-round program, not ad hoc mailings. This paper provides three examples of effective annual calendars.

The Importance of Regular Communication with Donors

The lifeblood of a strong direct mail program is the donor who joined through direct mail and prefers to renew through the mail. This is important because there are a few things we know about direct mail donor behavior, regardless of a nonprofit's cause or mission. For example:

- **Direct mail donors tend to give to multiple charities.** The people you think of as "your" donors are likely getting a lot of compelling mail from other organizations. You must compete for attention in the donors' mail boxes. Donors won't respond to every appeal, but regular communication is necessary if you hope to stay "top of mind" with them.
- **Offering more opportunities to give results in more gifts and higher donor retention.** Some nonprofits send few appeals so as not to "bother" the donor. Yet, results analysis shows that *the person who is most likely to give a gift is the person who has just given a gift!* Many donors like to give through the mail. This can be overshadowed by the handful of complaints that find their way to the CEO. A shift in thinking is in order: consider every gift as a compliment. Through that lens, "likes" far outweigh "dislikes." Further, our research indicates that donors who request only one mailing per year—a request that must, of course, be honored—tend to renew at far lower rates than those who receive the full mail schedule. Finally, if you are concerned about sending too much mail, consider this case study:
 - **Year-round test of direct mail frequency.** A large national nonprofit segmented its donor base into three groups and conducted a three-way test of its annual appeal schedule. Group A received 12 appeals per year, Group B received 15, and Group C received 18. The solicitations were over and above any cultivation mailings, such as newsletters and planned giving mailings, which were constant across the three groups. The result: the most aggressive schedule (Group C) generated the most gifts, the most net income, and the *highest donor retention*—casting doubt on the notion of "donor fatigue."

In our experience, an effective way to determine whether you are sending enough mail is to measure giving frequency. The norm for nonprofits with robust direct mail programs is about 1.5 gifts per active donor per year (not inclusive of monthly giving). If you are not achieving this level of frequency, it's likely that you are not sending enough renewal/appeal mail throughout the year and your donor retention may be subpar.

- **A word on multi-channel marketing.** Direct mail continues to be the most effective tool in driving donations, however it is important to consider a more integrated approach across all communication channels, especially within digital and online platforms. Integration of even just a few corresponding emails (directed to well-designed landing pages) will not only increase the value of gifts received, but will increase the lifetime

Direct Mail Annual Calendar: Planning Ahead to Maximize Results

value of your donors as well. A 2015 report from the Direct Marketing Association says clients report that, on average, every \$1 spent on email marketing returned a whopping \$38. In addition, it is important to ensure that your organization's digital hub is aligned with your fundraising goals, and has the ability to track shared communications and solicitations across channels. Consistent and integrated messaging across digital platforms, including your website and your social media outlets, is integral to mastering multi-channel fundraising success. These are just some of the digital marketing tactics that can be used to augment a direct response campaign.

Sample Annual Plans

The following chart reflects solicitations only. It does not include cultivation materials such as planned giving mailers or newsletters, though some of those mailings may include a soft ask (such as a reply envelope but no reply device). Also, while some Appeals can be modified to speak to non-donors, the three scenarios do not specifically include acquisition mail.

	Scenario 1 Minimal Schedule	Scenario 2 Optimal Schedule	Scenario 3 Email support for S1 and S2
January		Annual Renewal Series 1	Email & Landing page
February	Winter Appeal	Annual Renewal Series 2	
March		Annual Renewal Series 3	Email & Landing page
April		Annual Renewal Series 4	
May	Spring Appeal	Fiscal Year End Appeal	
June	Spring Reminder	Fiscal Year End Reminder	Email & Landing page
July		Fiscal Year End Thank You	
August		Fall Appeal	Email & Landing page
September	Fall Appeal	Fall Reminder	
October		Year End Renewal Series 1	Email & Landing page
November	Year-End Appeal	Year End Renewal Series 2	
December	Year-End Reminder	Year End Renewal Series 3	Email & Landing page

- **Scenario 1.** This scenario calls for six solicitations—the minimum needed to achieve meaningful net income and acceptable donor retention. Two of the mailings are Reminders that follow the same theme as the preceding Appeal. Because the Reminder follows the Appeal within 2-4 weeks, there isn't enough time in the production process to suppress early respondents. This can be mitigated by adding language such as, "If you responded to my previous letter, please accept my thanks and excuse this reminder."
- **Scenario 2.** This plan calls for 12 solicitations—the "sweet spot," in our experience. The first four mailings and the final three are designed as series; respondents are suppressed from the subsequent mailings as soon as response data is available. In both cases, the word "Renewal" is used for its persuasive power, not the advancement of an expiration date. (Nonprofits that offer annual 12-month memberships with benefits that expire should follow a subscription-style mail schedule.) The donor is being asked to renew in the sense of continuing his or her support today. Thus, "renewal" as a rhetorical device can be used

Direct Mail Annual Calendar: Planning Ahead to Maximize Results

more than once per year. This scenario also shows how a nonprofit with a July 1 – June 30 fiscal cycle can use the May-June Appeal/Reminder sequence to highlight the June 30 deadline. This can be followed by a “thank you” message in July, celebrating the success of the previous fiscal year and inviting ongoing support as the new one begins. Nonprofits with a calendar year budget cycle can employ various alternative themes in the May-July window.

- **Scenario 3.** This plan calls for the same 12 direct response solicitations as in Scenario 2. In addition, we recommend the development of 6 email blasts (to those for which we have emails and have permission to send) that directs them to Landing pages. These Landing pages act as ‘mini-websites’ with a story and strong call to action. Dollars raised from email can be tracked separately. Utilizing an approach of both direct response and email boosts frequency but also permits the user to donate in the fashion they are most comfortable – either direct response or online.

Conclusion

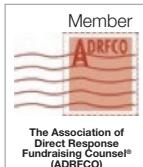
Nonprofits that employ direct mail *systemically* achieve more consistent results than those that send the occasional one-off appeal. Any organization that wants to maintain a donor base must make a considerable investment in the infrastructure required to track, acknowledge, and service those donors. Employing a robust direct mail schedule empowers nonprofits to reap maximum dividends from the machinery that is already in place.

About the Author

Shawnda Lembke represents C.I. Partners Direct with clients requiring high level fundraising strategy. She specializes in program planning and results analysis with an emphasis on achieving targeted response and ROI goals for donor and membership acquisition and retention programs. Shawnda's clients include University of Southern California, Cedars-Sinai Medical Center, Dignity Health System, Palo Alto Medical Foundation, Mills-Peninsula Hospital Foundation, Children's Hospital of Orange County and Arkansas Children's Hospital. She is also a requested guest speaker for Association of Fundraising Professionals, Annual Giving Professional Network, Council for Advancement and Support of Education and Southern California Association for Healthcare Development.

About C.I. Partners Direct

C.I. Partners Direct was formed to provide our clients with exceptional results along with an excellent customer service experience. We have a staff that is highly experienced in nonprofit direct response fundraising. We focus exclusively on the Healthcare, Children's Hospitals, Higher Education, Social Service and Cultural nonprofit markets. We partner with our clients to provide customized strategy and long term planning to achieve your fundraising goals.



C.I. Partners Direct is a member of the Association of Direct Response Fundraising Counselors.

