

# List

From the Target Marketing Group

JUNE 2008

# Insider

A Privately Circulated Letter for List Professionals and Mailers

## Conference Call

This is a terrific time of year for fundraising conferences. The DMA Nonprofit Leadership Summit, which was held at the Ritz-Carlton in Palm Beach, Fla., this year, just passed. If you missed it, keep an eye out for information on next year's summit. Or check out [www.the-dma.org/conferences/nonprofitleadershipsummit](http://www.the-dma.org/conferences/nonprofitleadershipsummit).

But coming up is the red-hot Bridge Conference July 23-25 at the Hilton Washington in D.C. A joint effort of the DMAW and AFP/DC, this still-young conference really buzzes. Tracks include Major Donor; Direct Response Fundraising; Creative, Copywriting and Design; Leadership and Management; Commercial Direct Response; Corporate, Foundation and Deferred Giving; and Messaging and Communications, among others. For information, go to [www.bridgeconf.org](http://www.bridgeconf.org).

Then in August, it's the Direct Marketing Association's 2008 New York Nonprofit Conference at the Waldorf=Astoria Aug. 14-15. The conference will cover a nice range of topics, among them: wooing lapsed donors; ethics, privacy and accountability; donation processing; testing new creative, offers, format and channels; and getting second gifts.

For more information and a complete agenda, go to [www.the-dma.org/conferences/dma-nonprofitny](http://www.the-dma.org/conferences/dma-nonprofitny).

## A List Professional Speaks

### Lisa Greene

President and CEO, Specialized Fundraising Services

**L**isa Greene started her career in 1983 at the Walter Karl Co., first in the publishing area, then in the fundraising division that functioned as a full-service direct-response agency for nonprofits.

She worked closely with 30-year fundraising vet and industry leader Don Kuhn, and was promoted to vice president in the fundraising division, working with a variety of nonprofits. In 1991, she started a fundraising division for a Midwest direct-marketing firm and later for a Northeast list brokerage and management firm.

In January 2005, Specialized Fundraising Services was started to service nonprofit organizations exclusively.

#### List Insider: How and why did you get into the list business?

**Lisa Greene:** Purely by accident, answering a blind ad right out of college. The job market was weak in 1982 when I graduated from college, and after searching for the "dream" job, I jumped at the opportunity to get some experience at Walter Karl. However, I was commuting nearly 60 miles each direction and planned to stay just a year; seven years later I was still employed at Walter Karl, and direct marketing was in my blood.

#### LI: Who were your mentors in the business, and what are the main lessons they taught you?

**LG:** Don Kuhn was my mentor, and he taught me so many things. But being a professional was the most important. Always be honest and

do what is in the best interest of the client. He instilled in me my interest in analytics and going beyond the basics.

#### LI: Who were the two most memorable people you ever met in the list or direct-marketing business — and why were they so memorable?

**LG:** Don Kuhn was an interesting and eccentric person. Business trips became "Fundraising 101" in which I was taught and quizzed. He was so passionate about the profession, and it was contagious. Don mentored so many wonderful direct marketers and fundraisers over the years and contributed greatly to the industry by sharing his knowledge.

Don Chilcutt was another memorable mentor. Don has a wonderful spirit of entrepreneurship, and he gave me an opportunity to think in those terms.

Over 25 years in this industry, I have met so many wonderful, passionate fundraisers and direct marketers that have inspired me.

#### LI: What do you like most about the list business?

**LG:** Every day is the same but different. Even after nearly 25 years I can be surprised and come upon a problem never before encountered. It's always a challenge, and these days have become even more challenging. With shrinking list universes, more competition and declining response rates, brokers need to be very proactive, always thinking about how to be one step ahead. We are no longer the



## Highlights of the JUNE 2008 Issue!

### Leading the Charge

At just 5 years old, the Jacksonville, Fla.-based Wounded Warrior Project has found that embracing social networking and other new fundraising and fundraising tools is not only a good idea, but a completely necessary one as it reaches out to the public to fund its mission of helping transition wounded veterans coming home from the conflicts in Iraq and Afghanistan back to civilian life.

Its founder and executive director, John Melia, talks about engaging this new breed of vets, and shares his take on integrating multiple channels of communication and marketing, staying in the media spotlight, and the sometimes controversial concept of ranking nonprofit organizations.

### A Tradition of Giving

*FundRaising Success* Associate Senior Editor Melissa Busch talks to a fundraising pro with two decades of experience about the importance of nurturing a passion for your mission not only in current donors, but also in those younger family members who are poised to become the next generation of givers.

### Social Media: Marketing

#### Myths and Universal Truths

Online communities like MySpace and Facebook, as well as on your own and other Web sites, offer great opportunities for awareness building and fundraising — if you know how to navigate them.

### Web to the Max

There are so many things to consider when it comes to your organization's Web site — and it's a lot more complex than just creating a blinking, neon-pink



“Donate Now” button to get visitors’ attention. But if you take it one step at a time, you’ll find it’s actually quite manageable.

### To the Point

Columnist Katya Andresen brings back the Marketing Maven, who takes on the three most communicable nonprofit diseases: Field of Dreams Syndrome, It’s All About Usitis and Call to Inaction Disease.

### Easier Said Than Done

Columnist Jeff Brooks explains why, despite her good intentions, your English teacher gets an “F” when it comes to writing nonprofit fundraising materials.

### DM Diagnosis

Direct-mail maven Kimberly Seville becomes a rabid online activist to track how nonprofits are converting online action takers to donors and members — or even if they are at all.

Lisa Greene ... continued from page 1

brokers of the '80s or even '90s. We must be strategists and analysts these days, and the constant changes and challenges are energizing.

### LI: What do you like least about the list business?

LG: Dealing with brokers and managers who don't have all the facts and don't do their homework.

### LI: When a client hires a new product manager or marketing manager with no direct-marketing experience, how do you go about bringing that person up to speed, and how long should it take?

LG: I enjoy mentoring new clients, sharing my experience, making recommendations and encouraging them to become involved in the DMA and other trade organizations that offer training and support. Most organizations don't hire totally “green” individuals, but many nonprofits hire individuals with nonprofit experience and general marketing experience who need to learn the business of direct marketing. It takes years to become a seasoned direct marketer, but with support from experienced vendor partners, and by taking the initiative to read, attend conferences and ask questions of those around you with experience, most new managers can be productive in a fairly short time frame.

### A Target Marketing Group Publication

## List Insider

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**LI: The list business is not something that is taught in great detail in marketing courses. What are the qualities you look for in a candidate in terms of education, experience and personality? Can you prioritize these qualities?**

**LG:** When we hire we look for intelligent individuals who appear to be quick studies. We look for individuals who have experience multitasking, are very detail-oriented and who are also good communicators. We can teach the business, but I have found the most successful individuals already have these qualities.

**LI: How do you go about training a new hire — teaching the list business so that clients have a real comfort level when that person services them?**

**LG:** We mentor new hires with various levels of staff within the organization so that they understand what all the individuals within the organization do and why. We provide written material about the industry, the players and the jargon. We hold in-house seminars on various areas of the business such as merge/purge, customer service, negotiating and fundraising 101.

Depending on the position, the new hire will work side by side for a few months with an experienced individual who is doing the same type of job the new hire will be doing. The new hire will start with projects and be given the how-to and whys, and then, in my opinion, they need to get on-the-job experience. In this way, they learn the questions to ask and how to respond. Brokerage and management are not skills to be learned in a classroom setting — it takes actual experience to learn all the nuances.

Learning the business takes time even for new hires with extensive business experience. With time and exposure to many situations you become a seasoned professional — the training very truly never ends.

**LI: If you could wave a magic wand, what changes would you make in the list business?**

**LG:** Doing away with mail-date protection. These days the same names exist on so many lists and mailboxes are so full that if a list owner blocks out 20 weeks a year during their housefile mailings and does not allow exchanges or rentals, they

*Continued on page 4*

## From the WHO'S MAILING WHAT! Archive

# A History Lesson

Funding education and enrichment for the Mount Vernon Ladies' Association

**Y**ou have to be pretty important for the federal government to take a day off on your birthday. Presidents Day, celebrated the third Monday in February, currently honors all our great leaders, but was first designated for George Washington's birthday.

In its recent acquisition mailing, the Mount Vernon Ladies' Association celebrates Washington's birthday and tells compelling facts about the first president. For example, in addition to being a general, he was a farmer, slaveholder and writer. The mailing even informs the prospect, in an interactive quiz, that Washington never chopped down a cherry tree and that that story was, in fact, manufactured by one of his early biographers.

The Mount Vernon Ladies' Association dates back to 1853, when the Mount Vernon estate in Virginia, nearly in ruins, was for sale. The MVLVA raised private funds to purchase the estate, and has since reinstated the home as a museum and events center dedicated to celebrating its historic resident.

The March mailing was the first since the relaunch of MVLVA's donor program.

"The foundation of our new program is extensive research including focus groups and surveys conducted in the fall and winter of 2007," explains Denise Bealin, direct mail and membership manager.

"The results of this research pointed us in new directions concerning imagery and messaging. The most basic findings were that our donors are most interested in the Mount Vernon experience and George Washington, the man. We feel the birthday package reflects these findings."

The revised effort went to an audience of 200,000 prospects, including current and lapsed donors. It was tested along with 50,000 of the previous packages, which are plain No. 10s with a four-page letter and reply device. With a spruced-up 6-inch-by-9-inch outer, the new mailing begins with the outer envelope's script-style copy, reading, "Celebrate George Washington!" Meanwhile, neutral, warm colors also make it look less promotional and more inviting to open and read. Inside is a double-sided, one-page letter, buckslip with a quiz about the general, reply card and BRE

(Archive Code #602-675639-0803).

Within each package element, strong copywriting effectively persuades the prospect to give, continually using the birthday as an involvement device. The letter begins with a curious statement that draws the reader in: "If you're like most Americans, you probably didn't even notice" — the letter is suggesting the prospect might have missed Washington's birthday, but she will feel compelled to give anyway. The reply card even refers to the requested donation as a "belated 276th birthday gift honoring our nation's first real hero."

Distinguishing this package from the previous control is an enclosed glossy informational brochure, which folds out into a large, poster portrait of Washington. The brochure adds plenty of real estate to the effort for imagery and information detailing the history of the estate, and it highlights its educational facilities.

It also explains the poster portrait as representative of the "Portrait in a Classroom" campaign, an effort to reinstate the portrait of President Washington in schools throughout the nation.

"The Portrait in a Classroom program is a great success, and the birthday package points out that success and seeks to tap into the emotional chord the program has struck with our donors," Bealin says.

So far, it's too early to report the results of the mailing. But if it's successful, the nonprofit will resend this effort with a brochure again and include new creative and messaging. "Overall, we are committed to this fresh, comprehensive approach, based on research and results," Bealin says.

The Mount Vernon Ladies' Association will continue to reach out to donors via direct mail, newsletters, online and through personal cultivation for high-level donors.

"We hope that this will open new directions for direct mail and development at Mount Vernon," Bealin adds. — *Britt Brouse*

For more direct-mail packages, go online at [www.whosmailingwhat.com](http://www.whosmailingwhat.com) and access the amazing library of direct mail samples. If you want to see the actual package, you can order a dummy for as little as \$30. Call Paul Bobnak at 215.238.5225 for more information.



## Who's Mailing What! List

● The Compassionate Givers database is a must-test for marketers looking to appeal to conservative Americans who have shown their support for various humanitarian appeals and the political conservative agenda, says Jenna Silverstein at **Response World**. These 435,403 donors give an average gift of \$20 or more. This file has been mailed by numerous marketers in the last year, including the Alliance Defense Fund, American Bible Society, Boy Scouts of America, Cystic Fibrosis Foundation, National Children's Cancer Society and Feed The Children. 866.822.0212; www.responseworld.com

● According to Kerry Alvarez at **Millard Group**, the Smithsonian Catalogue file has performed strong with its 180,507 12-month, mail-order buyers. The catalog offers an assortment of jewelry, furniture, home décor, gifts, apparel and toys inspired by the collections of the Smithsonian Institution. The average age is 45-plus with household incomes of \$60,000 or more. This list has been tested by Dean & DeLuca, Discovery Channel Catalog, Marine Toys for Tots Foundation, The Salvation Army, Southwest Indian Foundation, Winterthur Museum and Woolrich. 603.924.9262; www.millard.com

● The Paralyzed Veterans of America Premium Donor Masterfile has been a popular choice according to Stacey Stonebridge at **Lake Group Media**. This file, compiled 100 percent through direct mail, contains more than 4.1 million donors who've donated at least \$5 in the last two years to the Paralyzed Veterans of America. The PVA is the only congressionally chartered veterans service organization dedicated to enhancing the lives of individuals with spinal cord injuries and diseases. Mailers include AAA, Adopt a Platoon, American Action Fund

for Blind Children and Adults, American Red Cross, City of Hope, Habitat for Humanity, March of Dimes Foundation, Meals on Wheels Association of America and St. Jude Children's Research Hospital. 914.925.2400; www.lakegroupmedia.com

● Lisa Duke at **Specialized Fundraising Services** says the Muscular Dystrophy Association Direct Mail Donors database is a must-test for mailers seeking to connect with donors who support medical research, patient services, clinics, summer camps and other community services affiliated with the Muscular Dystrophy Association. Seventy-five percent of the 713,969 individuals on this list are more than 50 years old, and 17 percent are ages 41 to 50. Continuing mailers include AIDS Project Los Angeles, Alzheimer's Association, Autism Society of America, Cancer Fund of America, Fox Chase Cancer Center, National Breast Cancer Research Institute, Project HOPE and Veterans of Foreign Wars. 864.579.7755; www.specializedfundraising.net

● The CARE — Donors database has been a healthy performer for **Names in the News**, according to Sherene Kelly. You can reach 212,476 24-month donors to CARE, a leader in the fight against global poverty. CARE helps poor families and communities create lasting solutions to their most threatening problems. The average donation is \$30. Usage includes American Leprosy Missions, Catholic Charities of New York, The Fresh Air Fund, Goodwill Consortium, New Hampshire Food Bank, Philabundance, WaterAid and Women for Women International. 415.989.3350; www.namesinthenews.com

— Joe Boland

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**“With shrinking list universes, more competition and declining response rates, brokers need to be very proactive, always thinking about how to be one step ahead. We are no longer the brokers of the '80s or even '90s. We must be strategists and analysts these days, and the constant changes and challenges are energizing.”**

are rarely getting true protection. Those names exist on so many other list sources that the donors are still getting mail, but the list owner is losing a revenue opportunity.

#### **LI: How have co-op databases changed the list business?**

**LG:** Co-op databases are not as widely used in the nonprofit sector as they are in publishing and catalog marketing. Only a few exist in this sector. Most nonprofit mailers use names from this cooperative database as a small percentage of total mailing volume. I believe this differs from the commercial sector, where cooperative databases represent a large percentage of each mailing for many mailers. Nonprofits are generally cautious about involvement in cooperative databases, and I believe this has kept the number of co-ops down in this sector.

#### **LI: What percentage of your business is direct mail versus e-mail?**

**LG:** At Specialized Fundraising Services we work in direct mail 99.9 percent. Perhaps that will change, but for the moment in the nonprofit sector — which is our only focus — e-mail acquisition is not widely used.

#### **LI: What are your interests other than the list business?**

**LG:** My family. I have a husband and two children, 11 and 14, and they keep me busy along with two young dogs. As a family we enjoy boating and being on the water in the warm months. I enjoy pilates and reading when I can carve out a bit a free time for myself.

— Interview conducted by Marissa Fabris