Data Prep Outline

Below are the data points the Direct Mail Benchmarks data form will request. You can use this document to clarify what you need from your data team, should you need to communicate internally to gather all of the relevant information before completing the form.

The form can be found here. We request that your data be submitted by March 01, 2024.

Overall information:
- We are requesting sum totals, rather than raw data of every gift or donor.
- We are looking for data encompassing the specified calendar year (January 1-December 31, 2023).
- For simplicity, we are looking at data for one-time gifts (OTG) only (excluding monthly donors/revenue).
- The form will allow you to skip items you do not have data for. Partial data is better than no data!

Section 1: House File Performance Data

Direct Mail Revenue Category (annual)
☐ $100,000-$249,000
☐ $250,000-$499,999
☐ $500,000-$999,999
☐ $1M-1.9M
☐ $2M+

Anyone in your direct mail audience who made a donation to your organization previously, no matter the year, amount, or frequency. This includes active, lapsed, and long-lapsed donors.

Total # of Pieces Mailed 2023
This is the total number of direct mail pieces your organization sent to your House File in the specified calendar year.

Total # of Direct Mail Donors 2023
This is the total number of individuals from your House File who made a direct mail gift in the specified calendar year (OTG only).

Total # of Direct Mail Gifts 2023

This is the total number of direct mail donations received by your organization from your House File in the specified calendar year.

Total Direct Mail Costs 2023

This is the total amount your organization spent on its direct mail appeals (House File only) in the specified calendar year. These costs include hard costs such as design, print, lettershop, and postage. Please exclude labour and/or consultancy fees as well as taxes.

Total Direct Mail Revenue 2023

This is the sum total of all gross direct mail revenue received by your organization from your House File in the specified calendar year (OTG revenue only).

Total # of Renewed Direct Mail Donors 2023

This is the total number of individuals who made a direct mail gift in calendar year 2023 and made a direct mail gift in calendar year 2022.

Total # of Reactivated Direct Mail Donors 2023

This is the total number of individuals who made a direct mail gift in calendar year 2023 *and* who did not make a direct mail gift in calendar year 2022 *and* who have at least one prior direct mail gift on file from any other previous year.

Total # of Pieces Mailed 2022

Total # of Direct Mail Donors 2022

Total # of Direct Mail Gifts 2022

Total Direct Mail Costs 2022

Total Direct Mail Revenue 2022

Total # of Renewed Direct Mail Donors 2022

This is the total number of individuals who made a direct mail gift in calendar year 2022 and who made a direct mail gift in calendar year 2021.

Total # of Lapsed Donors 2022

Every organization categorizes their lapsed donor file differently, within varying timeframes. For the purpose of calculating a reliable reactivation rate in this year's report, we'd ask that you provide the number of lapsed direct mail donors that your organization included in your direct mail program in the calendar year 2022, but who did not make a direct mail gift in that year.

Total # of Direct Mail Donors 2021

Section 2: Acquisition Performance Data

Your mailing audience consisting of purely new prospects, who have never given to your organization, ever. These are often prospects found within list trades or rentals. Please exclude long lapsed donors.

Acquisition Sources
☐ Ex-Patients
☐ Rented Lists
☐ Traded Lists
☐ Unaddressed (Householder)
☐ Alumni
☐ Other:

Total # of Acquisition Pieces Mailed 2023

This is the total number of direct mail pieces your organization sent to acquisition audiences in the specified calendar year. For this survey, acquisition audience is defined as prospects who have *never* given to your organization in its history. Exclude long-lapsed donors.

Total Direct Mail Acquisition Costs 2023

This is the total amount your organization spent on its direct mail acquisition appeals in the specified calendar year. These costs include fees for list trades or rentals, as well as hard costs such as design, print, lettershop, and postage. Please exclude labour and/or consultancy fees as well as taxes.

Total # of Donors Acquired 2023

This is the total number of prospective donors that responded to the acquisition mailings you sent them in the specified calendar year (OTG only).

Total Revenue from Direct Mail Acquisition 2023

This is the sum total of all acquisition gross direct mail revenue received in response to your organization's acquisition appeals in the specified calendar year (OTG revenue only).

Total # of Acquisition Pieces Mailed 2022

Total Direct Mail Acquisition Costs 2022

Total # of Donors Acquired 2022

Total Revenue from Direct Mail Acquisition 2022

Section 3: Other Revenue Channels Data

We know that direct mail donors don't always respond via the direct mail package. Some donors may call in their donation while others may visit your website to make their gift. If your organization includes these types of other revenue sources in its direct mail revenue reporting,

Channel options:
☐ Email
☐ Social Media
☐ Website/Online
☐ Telephone
☐ Other:

Finally, we'll ask for 2022 and 2023 totals:

Total # of Other Channel Donors 2023

Total # of Other Channel Gifts 2023

Total Other Channel Revenue 2023

Total # of Other Channel Donors 2022

Total # of Other Channel Gifts 2022

Total Other Channel Revenue 2022