

Welcome to Sustaining Sustainers!

On your card:

1. What do you want to get out of this session?
2. What questions would you like us to answer?
3. Name/email if you'd like a copy of the materials

Free chocolate when you turn it in!

Sustaining Sustainers

Build and Grow Recurring Gift Programs

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Friends of the Boundary Waters Wilderness

Bob Breck, Lanark Consulting LLC

Agenda

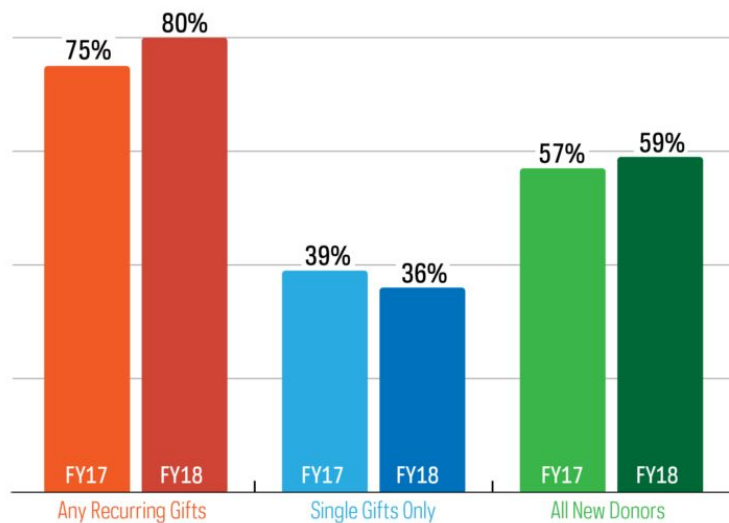
1. Why Sustaining Giving?
2. Care & Feeding
3. What You Can Do
4. Your Questions

Why Sustaining Giving?

1. Stable giving; increased your retention rate
2. Three Options for Renewing
3. Consistency & Predictability: Evens out your revenue
4. Many donors prefer it

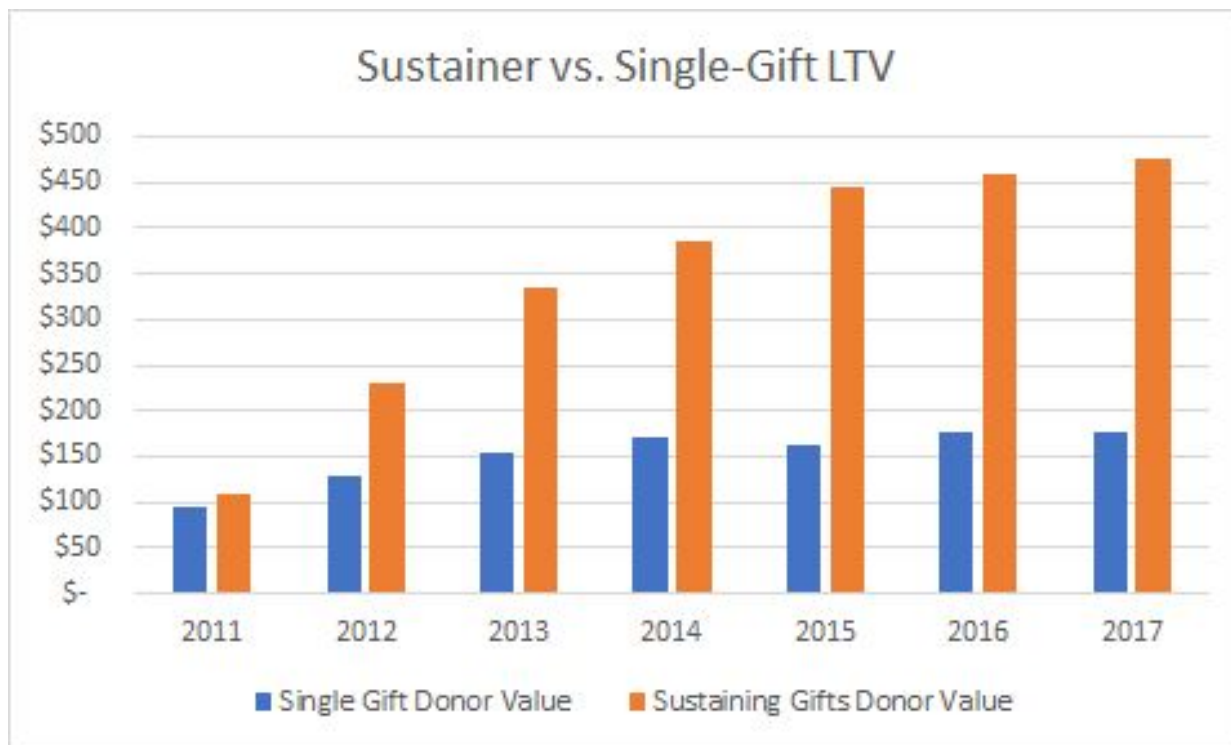
Retention

13th-month radio donor retention rates



Source: Blackbaud Target Analytics

Long-Term Value



Additional Sustainer Tips

- Allow Sustainers to identify themselves
 - Name the program
 - Talk about value and impact
- Thank them in their first year
- Ask the to upgrade early
- Convert single-gift donors quickly
- Don't be afraid to remind them that they are giving
- Make sustaining the default
- Don't discriminate vs. single-gift donors

Care & Feeding

— Heading off Problems & —
Increasing Revenue

Engagement

Default:
A Base Minimum

- Can make a \$5/month online gift.
 - Thank you upon submit on webpage.
 - Immediate email thank you.
 - Acknowledgement letter 3-7 days later.
 - Placed into monthly e-newsletter.
 - Gets Give to the Max Day blitz.
 - Year review of giving January
-

U of M example: first time donor

1. Immediate Email receipt.
2. Acknowledgement in <2 weeks.
3. One week after, email is sent. One-time gift vs. recurring version.
4. One week after email. Receive thank you postcard with bookstore coupon or luggage tag spot glued on to card if gift is >\$100.
5. Two weeks later, telemarketer calls to thank donor. Very personalized. Every Friday.
6. Four weeks later, another email. (Was the campaign email)
7. Eight weeks agter, another email, crowdfunding themed.
8. 12 weeks later, able to be in solicitations again.

Online

- Reinforcement “Stewardship”
- Hit Submit on gift
- Immediate thank you on page
- Immediate email
- Ask in the thank you or soon after. You should test this at least once
- Ongoing impact, personalized
- January giving review/tax receipt

Offline to an ask or newsletter

- Reinforcement “Stewardship”
 - Arrives with credit card
 - Ask in the thank you or soon after
 - (You should test this at least once)
 - Ongoing impact, personalized
 - January giving review/tax receipt
-

Touchpoint Calendar

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1			Donation	2 weeks	1 month	2 months	3 months	4 months	5 months	6 months	7 months	8 months	9 months	10 months	11 months	12 months	13 months	18 months	24 months
2	Email																		
3		Newsletter																	
4		Renewal																	
5		Upgrade																	
6		Sustainer Conversion																	
7		Add Gift																	
8		Event																	
9		Thank You																	
10		EFT Conversion																	
11																			
12	Direct Mail																		
13		Newsletter																	
14		Renewal																	
15		Upgrade																	
16		Sustainer Conversion																	
17		Add Gift																	
18		Event																	
19		Thank You																	
20		EFT Conversion																	
21																			
22	Telemarketing																		
23		Renewal																	
24		Upgrade																	
25		Sustainer Conversion																	
26		Add Gift																	
27		Thank You																	
28		EFT Conversion																	
29																			
30	Social Media																		
31																			
32	SMS/Text																		
33																			
34	Other																		

Download template at <https://tinyurl.com/lanark-touchpoints>

Where your data will fail you if you're not careful

- Not having a criteria document for everything external relations
- CRM pulls all current fiscal year donors
- Don't have a way of contacting them if they don't provide an email
- Only contact when soliciting
- Change benefits to differ from one-time donors
- Not building a profile

Building Profiles

You can't steward them if you don't know them

- People are accustomed to being treated as individuals, not ATMs
- Don't just ask once--find other opportunities to add info and fill in the blanks
- Behavioral links - CSE solar car, koalas, helping foster kids *with* siblings
- Appends. Start small, see what matters. Tons of options for a small group
- Rule: Don't ask what you don't plan to use. Have a plan for it all
- They will lapse a few years if over 10 year donors. Be forgiving.

A Good Starter Profile

Key Demos:

- *Address
- *Zip
- *Email
- Other HH Email
- Birthday

Motivation for giving

- Why did you give
- Channel

Testimonial/open-ended comments

Areas of interest (Can you get this from behavior?)

Communication Preference: how, how often, what

Years of giving vs “member since”

How do I Get Information to Build Profiles?

Inferred data

Then ask!

- At the point of donation
- Periodic Polls
- E-Newsletter clicks
- Offline (Form on back the badge, events)
- Annual Updates

Appends

Activity

Groups of 4-5

- Check your giving portals
- Pull up organizations
- Compare & Contrast

What is required?

What is not?

What to do with Profiled Donors

- **First: Capture it in a useful way**
- Use it to guide what you're writing about
- Use testimonials and donor stories
- Segment if you can: by interest, age, length of donation
- Newsletter Content, Legacy, Upgrade Ask
- Celebrate their longevity

Customizing Communications

- Remind them of why they gave
- Focus on impact of your gift
- Reflect preferences
- Make them feel like insiders and collaborators



UMN Examples



Dear Katrina,

THANK YOU for your tremendous support in 2017!

Because of your generosity, it was a great year at the University of Minnesota. Life-changing discoveries were made; students learned to think critically and work together to find sustainable solutions to today's most pressing issues; and people across our state were inspired to reach their full potential. As we begin a new year, we look forward to fueling creativity, taking on new challenges, and transforming lives – and we're excited to show you the impact of your giving.

To express our thanks for your dedication, we invite you to create a customizable University of Minnesota notepad, choosing from a variety of themes, text options, and images. Simply visit umfthankyou.umn.edu to get started, design your notepad, and enjoy!

Offer ends February 28, 2018

Get your free notepad



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THANK YOU



Thank you for your leadership and loyalty in annual giving to the U of M. Please choose a U of M Driven car magnet or window cling

Magnet or Window Cling?

- Magnet
- Window Cling

Delivery Information

Full Name:

Address:

Apartment/Suite:

City:

State/Province:

Zip:

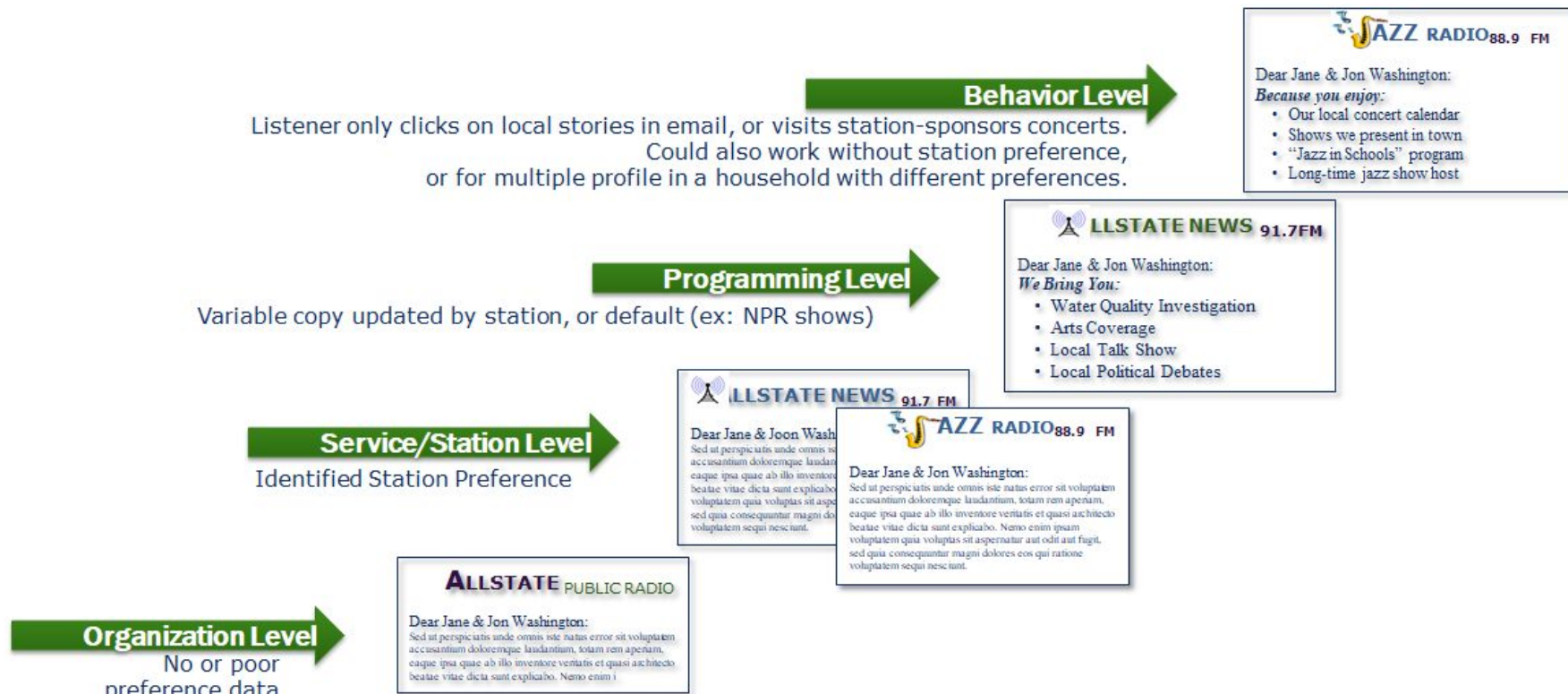
Country:

Email:

* Required Field

Place Order

What can Customized Communications Look Like?



Test Your Own Touchpoints

You should be doing this for your own organization

- Make a sustaining gift with your personal email
- Check monthly how it varies from other emails
- Trust but verify your emails are going out, & on time.

What Else Could Go Wrong?

- Accounting and donation systems aren't sustainer-ready
- The dreaded plateau
- Acquisition can get harder
- "I didn't mean to do this!"
- "...the charge didn't go through..."
- Credit card declines

Recapture

- “Interruption” not an expired credit card date or number
- Remind them of why they donated and what they donated
- The best time to increase donation amount
- Ask to switch to EFT
 - More money goes to the cause
 - Less admin and paper being used
 - Less hassle for donor
- Can they make up any missed payments?

A Modest To-Do List

1. If you don't have a sustainer program, start!
2. Focus on long-term value
3. Audit your donation path & process
4. Map out your stewardship
5. Start gathering (& maintaining) donor information to build profiles
6. Personalize and test communications
7. Always be thinking "what's next?"--the good and the bad
 - a. Can they be major donors?
 - b. Think of them as legacy prospects

Your Questions & Ideas

Resources/Learn More:

- Read: Sean Shrinier, Penelope Burk
- Pay attention to other examples:
 - Post Office
 - “You May Like” emails
 - Yelp, movie theaters
 - Spotify
 - Other retailer

Hit Us Up

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Download touchpoints template at
<https://tinyurl.com/lanark-touchpoints>