

Data Strategy



Forum

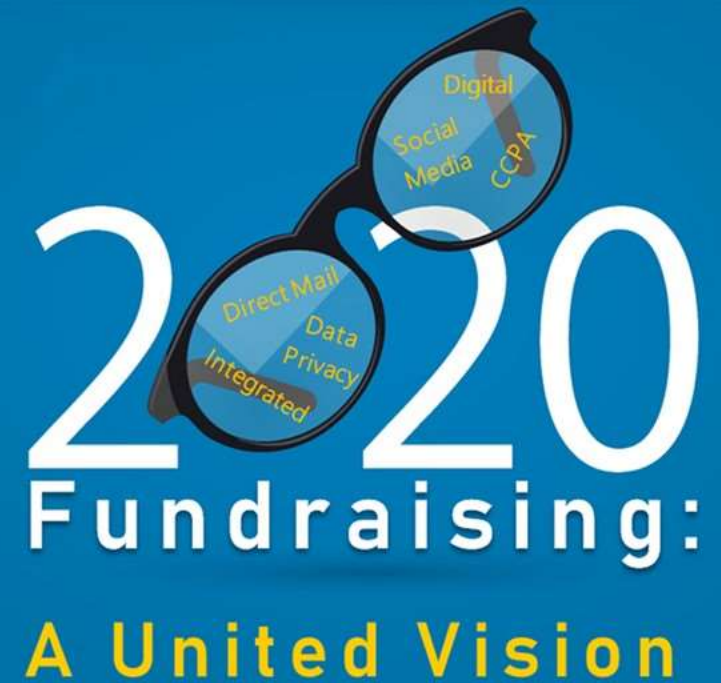
Keeping Your Monthly Donors
Always Gives You 20/20 Vision



Erica Waasdorp
President
A Direct Solution



Sponsored by:



Tuesday, October 13 | 2:05 - 2:35 PM EDT



“The **best time** to
plant a tree was 20 years ago.
The second **best time** is now.”

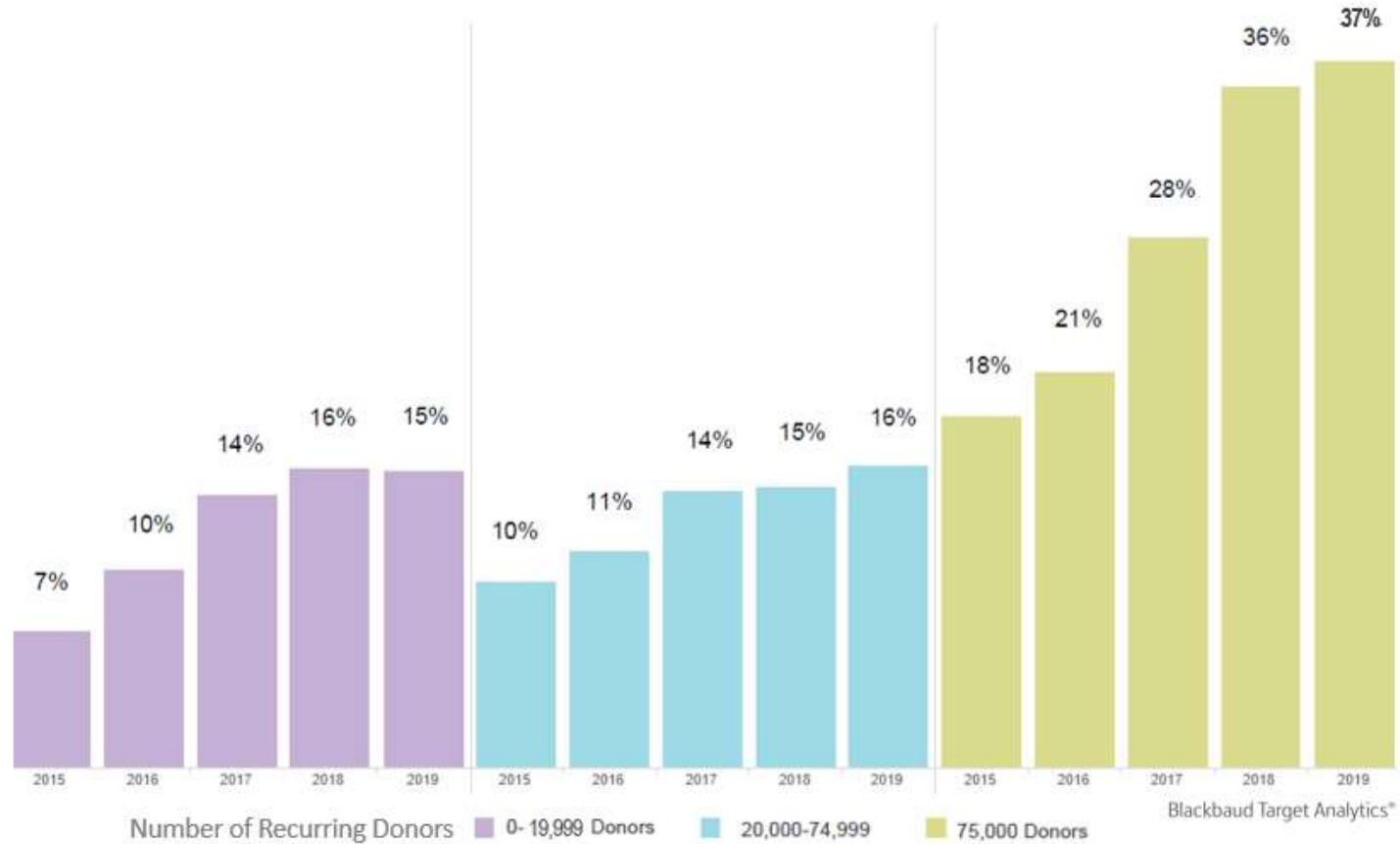
– Chinese Proverb

Strategic Considerations for Sustainers

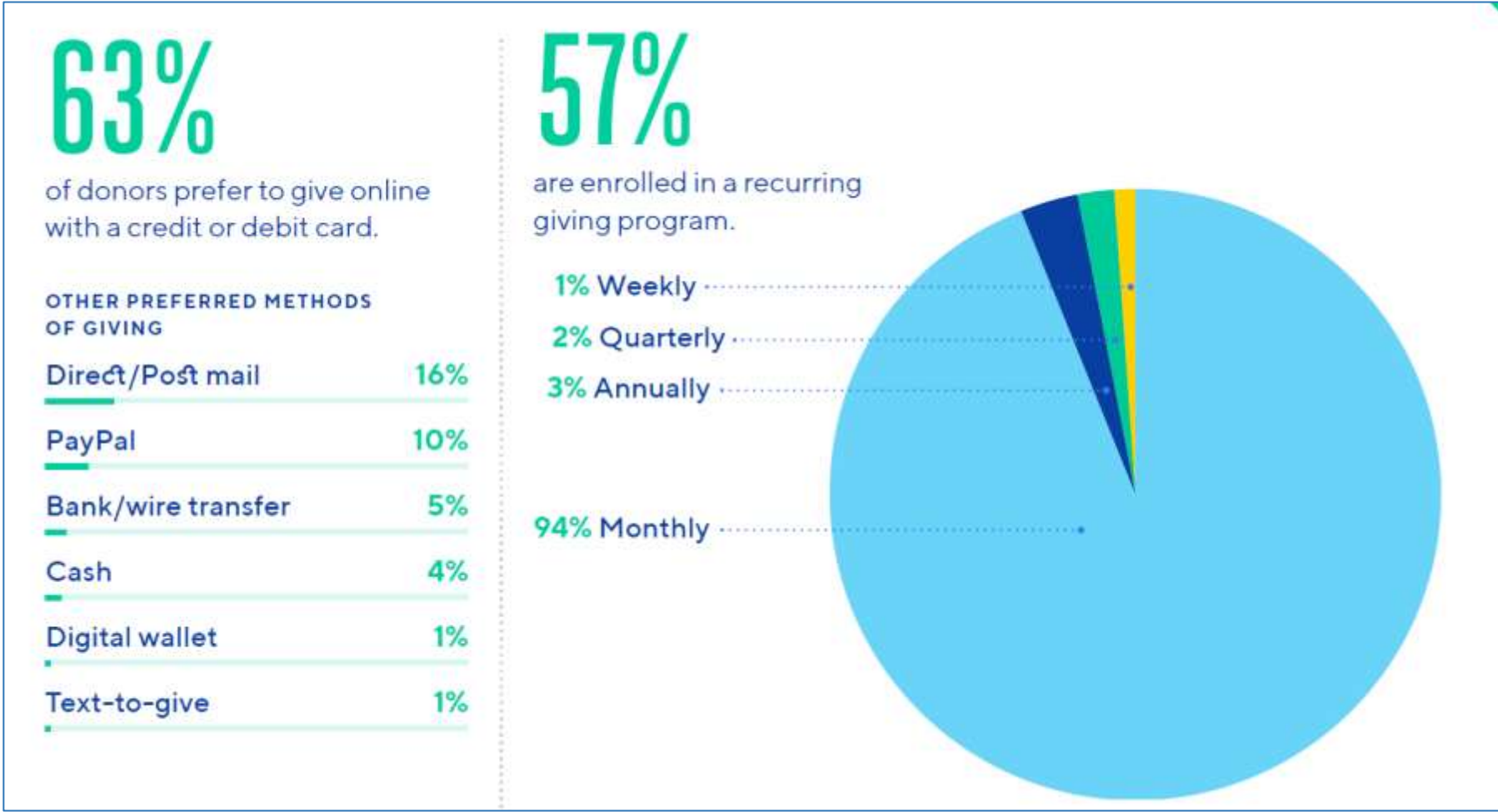
- Unite and bust the silos
- Special budget line to keep eye on annualized value
- Acquisition possible across all channels
- Cultivation and retention also across channels

Where is Sustainer giving today?

The Share of Sustainers Is Growing for All Program Sizes



57% Of Donors Enrolled in Sustainer giving



Source: GlobalTrends Giving Report 2020 (March thru May 2020), 46% of donors came from Canada, 6% from the US.)

What is the value of a Sustainer today?

Recurring Donor Value Is Increasing

\$260

Median Revenue per Donor for Recurring Donors making at least 12 gifts in 2015



\$271

Median Revenue per Donor for Recurring Donors making at least 12 gifts in 2019



The average recurring gift for multi-year donors making 12+ gifts in 2019 was \$23, a one dollar increase since 2015.

Who Drives the Sustainer Program?

Keeps Program
on Track



Retention Starts with Welcome and Cultivation

Well-cultivated monthly donors are more likely to:

- Respond to your appeals and messaging (all channels)
- Update payment info
- Re-join when the time is right
- Make extra gifts
- Upgrade to higher levels or leave you in their will!
- Sing your praises!



Never Too Late to Start Cultivating

ASPCA | Guardians

You've Joined a
MOVEMENT



400,000+ Animals Want to Say
Thank You

Barnes and John were rescued thanks to supporters like you!

We have big goals this year, and
YOU will help us reach them.

DMAW
Direct Marketing Association of Washington


A DIRECT
SOLUTION


2020
Fundraising:
A United Vision


Targeted Emails go a Long Way

ASPCA | Guardians


Guardian Exclusive!

Thank you for saving Triscuit


READ HIS STORY



Triscuit was found on a New York City sidewalk. Bleeding and in pain, the tiny kitten was struggling to breathe. He was rushed to the ASPCA. When lives are on the line, every minute matters and your Guardian membership allows us to act without hesitation to save animals like Triscuit.



"The way he was breathing, I didn't think he would make it," said Dr. Melissa Jones, Assistant Veterinary Staff Manager.



Though his injuries were frightening, Triscuit was a happy kitten and was fortunate to have supporters like you on his side for a remarkable recovery.

READ THE FULL STORY

Whether it's an injured kitten like Triscuit, a natural disaster or a global pandemic, the generosity of ASPCA Guardians allows us to be prepared to respond quickly and save lives. We can't do it without you!

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This email was sent to: ewesider@comcast.net

This email was sent by: ASPCA
424 E 92nd St New York, NY, 10128-6804, US




Direct Marketing Association of Washington



Engaging is Easy and Affordable

From: Ingrid E. Newkirk <donore@peta.org>
Sent: Wednesday, September 2, 2020 12:58 PM
To: erica@adirectsolution.com
Subject: Monthly donor update: You're a hero to ducks and quail

[View this message online](#)




Dear Erica,

I hope all is well with you. Thank you for your recent gift. I'm writing with great news: You have helped us positively influence two U.S. federal agencies in crucial ways that will have a huge impact on animals. Here's how:

From: Suzanne Murray, UUA Faithful Sustainers <sustainers@uua.org>
Sent: Tuesday, September 29, 2020 11:07 AM
To: Erica G. Waasdorp
Subject: Erica, last chance to sign up for tomorrow's call

If you have already responded, thank you No images? [Click here](#)

You are receiving this email because you have a recurring gift to the UUA. You may unsubscribe by using the link at the bottom of this message.



If you have already responded, thank you--you may disregard this message.

Reminder for Erica:

The Faithful Sustainer Update Call with UUA President Susan Frederick-Gray is tomorrow, September 30, at 3 pm ET.

[RSVP now](#)

- **What:** Faithful Sustainer Update Call
- **Who:** Susan Frederick-Gray, Carey McDonald (Executive Vice President), and YOU!
- **When:** Wednesday, September 30 from 3 pm to 3:45 pm Eastern Time
- **How:** Video conference or telephone option

Please RSVP to let us know whether you'll be attending. Call-in instructions will be provided to those who sign up.

I hope you can join us on Wednesday,

Suzanne Murray :: [she/her/hers](#)
Friends of the UUA
(617) 948-6544

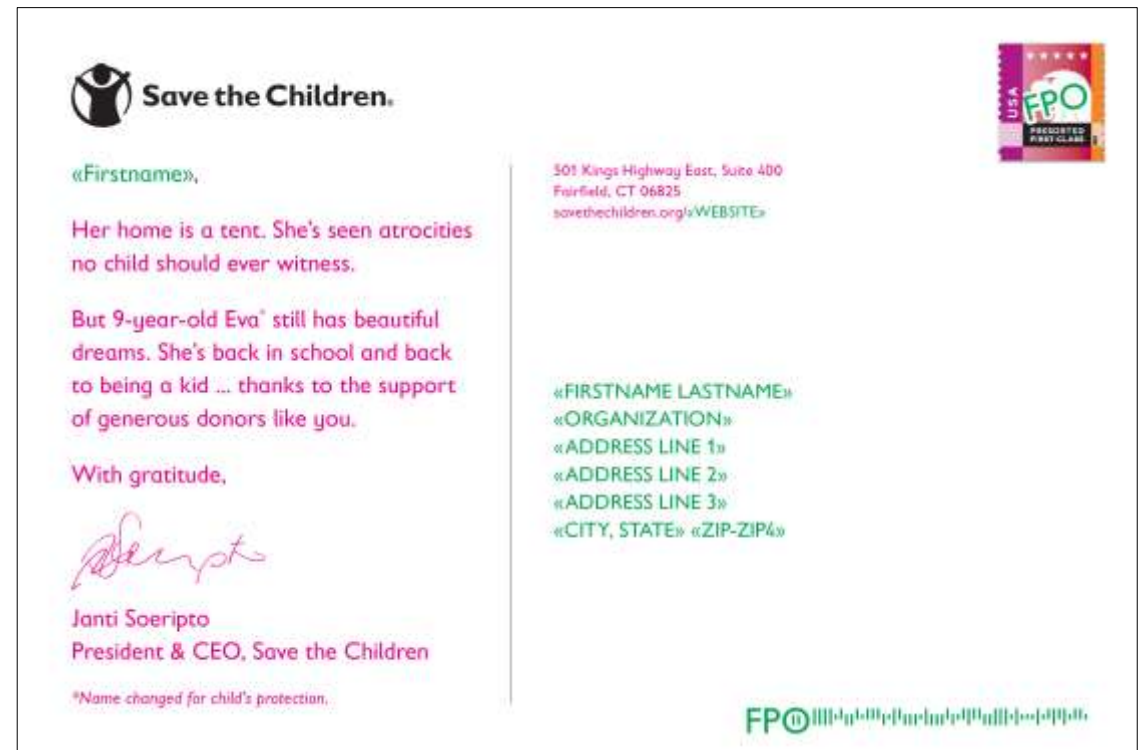


Use Video and Images to Your Advantage



Save the Children.
**SEE EVA'S SMILE COME TO LIFE
IN HER SPECIAL MESSAGE TO YOU**

To watch Eva's video, open your Save the Children "See My Impact" app and hover over her image. Don't have the app yet? Scan this code now to download it. ▶




Save the Children.

«Firstname»,

Her home is a tent. She's seen atrocities no child should ever witness.

But 9-year-old Eva* still has beautiful dreams. She's back in school and back to being a kid ... thanks to the support of generous donors like you.

With gratitude,





Janti Soeripto
President & CEO, Save the Children

*Name changed for child's protection.

501 Kings Highway East, Suite 400
Fairfield, CT 06825
savethechildren.org/«WEBSITE»

«FIRSTNAME LASTNAME»
«ORGANIZATION»
«ADDRESS LINE 1»
«ADDRESS LINE 2»
«ADDRESS LINE 3»
«CITY, STATE» «ZIP-ZIP4»



Sustainers Step Up Even During a Crisis



Hello Erica,

My first thought during this difficult time is how you are doing. If you're like me, you feel like you're getting the virus about every 4 hours. Then I suddenly feel better and realize that nothing is wrong. The more we stay at home, the more this will become commonplace. Just make sure you stay healthy!

I wanted to give you an update on operations here at Guardian Angel Basset Rescue. If you've been a partner with GABR for a while, you know that we believe fundraising is essential to help the Bassetts that you care so much about.

Because of your special help as a BFF, we can continue the work we've done for 25 years.

But in these uncertain times, I expect that we will see an increase in Bassetts that need to be surrendered. So I'm reaching out to you today because I know you'll want us to be there for them!

For example, we recently rescued **Ellie & Scout**, a brother and sister aged 14. They came to us from Indianapolis where their owner, who was homeless, had not had them vetted in 8 years. Their teeth were in horrible shape and they had many other problems. Unfortunately, Ellie lost her fight before all the surgery that was required but **Scout** is doing fine.



We've always taken in seniors like these, but now they are coming more often. **That takes more funds for their treatment.**

Would you like to help us?

As you know, our Basset Ball had to be cancelled this year. That event brings in major revenue for us, especially through our **"Gifts From The Heart"**. That's why we're planning to run an online event within the next few weeks, probably on April 25th. One of things we'll be doing is asking you to participate in direct giving for **"Gifts From The Heart"**.

This year, those funds will be earmarked for the substantial number of senior Bassetts we are receiving.

Consider making a pledge during our online event for the funds we need to guarantee that we continue to take dogs like **Scout**.

Our goal for the event will be a minimum of \$50,000. I realize that our challenge to you will be large but I'm confident you'll be able to help.

As soon as we announce the date, make a note on your calendar to "Virtually Attend" our live event.

And here are two other things you can do.

1. You can increase your monthly donation to BFF. Simply [CLICK HERE](#) to let us know. We'll take care of it right away.

2. Or, you can agree to change your preferred donation to have your donation come directly from your checking account. **That will reduce our fees by over 75% - that's a BIG DEAL!**

Just reply to this email - we'll be in touch right away!

Just let us know your preference. I look forward to seeing how you want to help us be ready for more Bassetts like Scout.

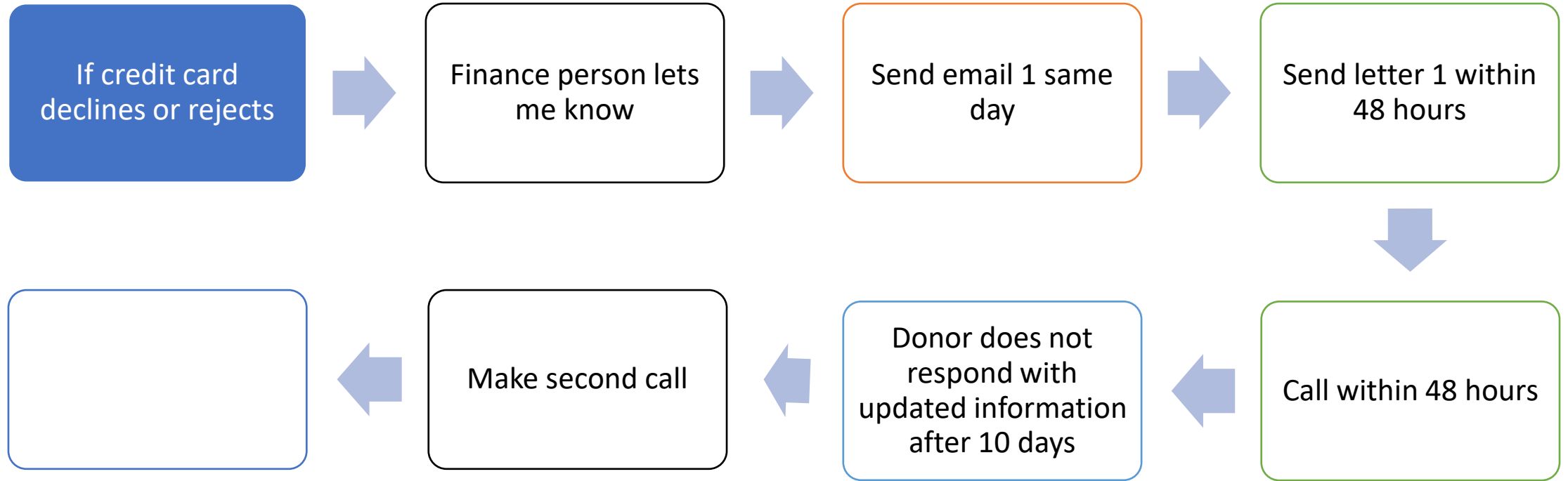
And just let me know if there's anything I can do to help in any way. My cell phone number is 815-228-5835. Don't hesitate to call.

Remember – **"Let's make the rest of their Lives, the best of their Lives!"**

Retention Takes Vigor and Focus



Know your Retention Process (Write it down!)



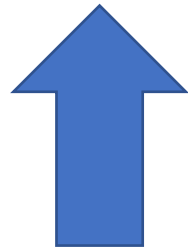
How many sustainers are you losing?



Retention Impacts Growth.

Example 1

	#	Value	Annualized
New Sustainers	400	\$ 24	\$ 115,200
Lapsed Sustainers	50	\$ 24	\$ 14,400
Reactivated Sustainers	25	\$ 24	\$ 7,200
Coverage Ratio	850%		
Annualized value at risk	\$ 7,200		



Example 2

	#	Value	Annualized
New Sustainers	200	\$ 24	\$ 57,600
Lapsed Sustainers	250	\$ 24	\$ 72,000
Reactivated Sustainers	25	\$ 24	\$ 7,200
Coverage Ratio	90%		
Annualized value at risk	\$ 64,800		



Be Proactive

----- Forwarded message -----
From: **One Tail at a Time** <cara@onetail.org>
Date: Mon, Sep 21, 2020 at 4:13 PM
Subject: [TEST] Oh no! Your monthly donations will soon expire...
To: <cara@onetail.org>



Debbie ,

Please click the button below to update your donation info. Our homeless pets would be so sad to miss your next monthly gift!

Let us know if you have any questions -- and as always, thank you for giving pets like Peso here the chance they deserve, all year long.

-Cara & The OTAT Family

[Update My Payment Info](#)



Be Direct



Dear Erica,

Thank you for your dedicated participation in Sequoia Society, the monthly giving program for Yosemite Conservancy.

We appreciate your monthly contribution of \$5 from your credit card ending in *****2958.

Update to Enhanced Security

We have recently upgraded our payment processing to enhance security. You can now update your payment information and gift amount online. In order for you to take advantage of this new

system, please [visit our secure portal](#), verify or update your gift amount, and enter in the credit/debit card information you'd like to use for your gift.

[Update My Monthly Gift](#)

You can also make this change by speaking directly with me or Conservancy staff by replying to this email with your contact information and by leaving a voicemail at 415.434.8446 x 316.

Thank you for your help.

Isabelle Luebbers
Senior Annual Giving Director

Be Personal

WE NEED YOU BACK!



Even if the Trump administration is defeated in November (and there is no guarantee they will be), it will take a lot of time, work, and resources to repair the devastating damage they have done to the environment. The Earth will still desperately need your help.

You were once a Wilderness Guardian; that is why we are reaching out to you.

In the coming months, we will face critical challenges as the

Sierra Club relies on our most steadfast core supporters, our Wilderness Guardians, in order to continue to:

- Protect wild places and endangered species
- Keep our air and water clean
- Ensure a clean energy future
- Curb climate crisis
- Keep the pressure on politicians and corporations to ensure safe and healthy communities.

2501 Webster St Suite 1200
Oakland, CA 94612

Visit sierraclub.org/pledge to reactivate your commitment.

Use your member number [123456789](https://sierraclub.org/pledge) to access your account!



If you have any questions about reactivating your status as a Wilderness Guardian, we are here to help. Please call, text, or email your personal counselor, Cory Tembrink.

(541) 227-4294
cory.tembrink@sierraclub.org



Vicky Barrett-Putnam
2501 Webster St Suite 1200
Oakland, CA 94612



Source: Vicky Barrett-Putnam, Sierra Club, DMAW Sustainer World



Use the Phone to Make Courtesy Call

- Thank
- Ask for Update/Offer solution
- Thank again
- If voicemail, leave a message of thanks



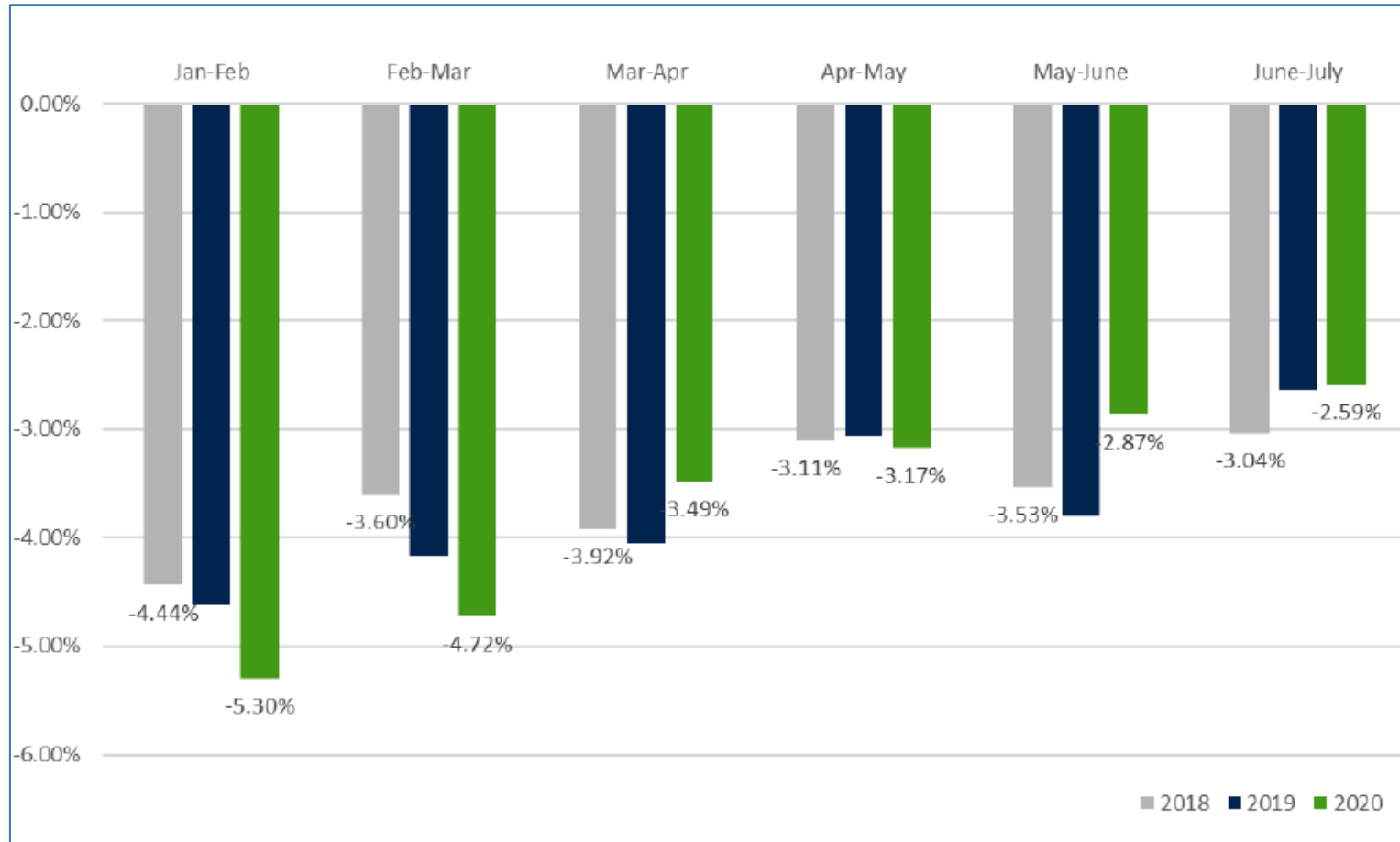
Go Back to Lapsed Sustainers

“I began calling lapsed monthly donors. Of 48 completed calls, 24 re-activated. Some had been lapsed for 5 years or more.

“The calls don't take very long. I schedule one per day, and if I miss a few days it's easy to catch up. I stay a half-hour late one day a month to try to catch people who I can't get hold of.

“I've gleaned valuable information from people who say 'no'.”

Track Drop Off Rates by Payment Type and Channel



Covid-19 Less Impact than Feared. Why?

- Ready with Save script
- Offer to pause
- Monthly donors care!



Save script offers lower amount or pause

I'm sorry to hear that. Would you mind sharing why you're not able to continue your monthly gifts?

Wait for answer. If it's because of financial reasons, offer them this:

Well, would it be easier to perhaps do a smaller amount? Or would it be okay if I contact you in a few months to see if your situation has changed? Your monthly gifts really make a difference to the [children/animals/clients/your focus].

If still not interested in continuing, just thank them. Don't be too pushy.

I totally understand Mr./Mrs. Name. We really appreciate all you've done. Would it be okay to still send you a few updates a year in the mail or via email?

If Yes, verify email address and mailing address.

If no, make sure they get flagged in the donor base as do not mail/do not email

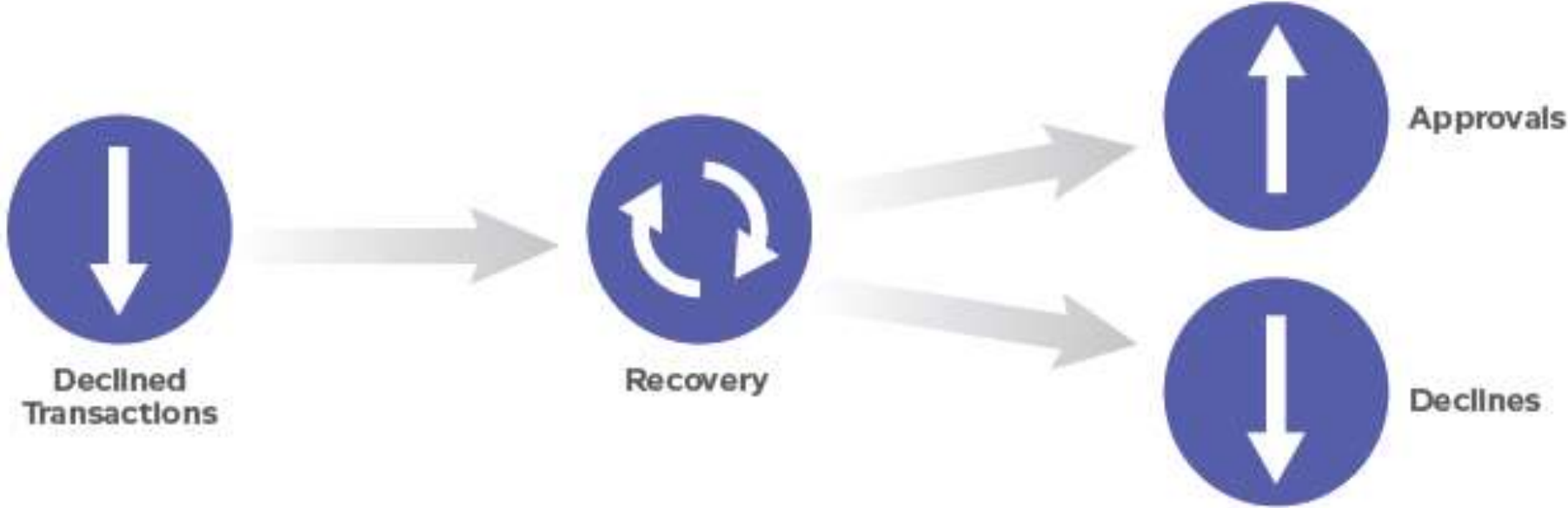
Thank you again for all your help! Have a wonderful day!

Use text if you have permission

Hi, here's a message from [nonprofit].

It looks like we couldn't process your most recent monthly gift. It's easy to fix. Please use this **LINK** to update your account, or **CALL xxx-xxx-xxxx** from 8am – 5pm EST M-F to connect with us to update your account info. Thank you!

Activate Account Updater



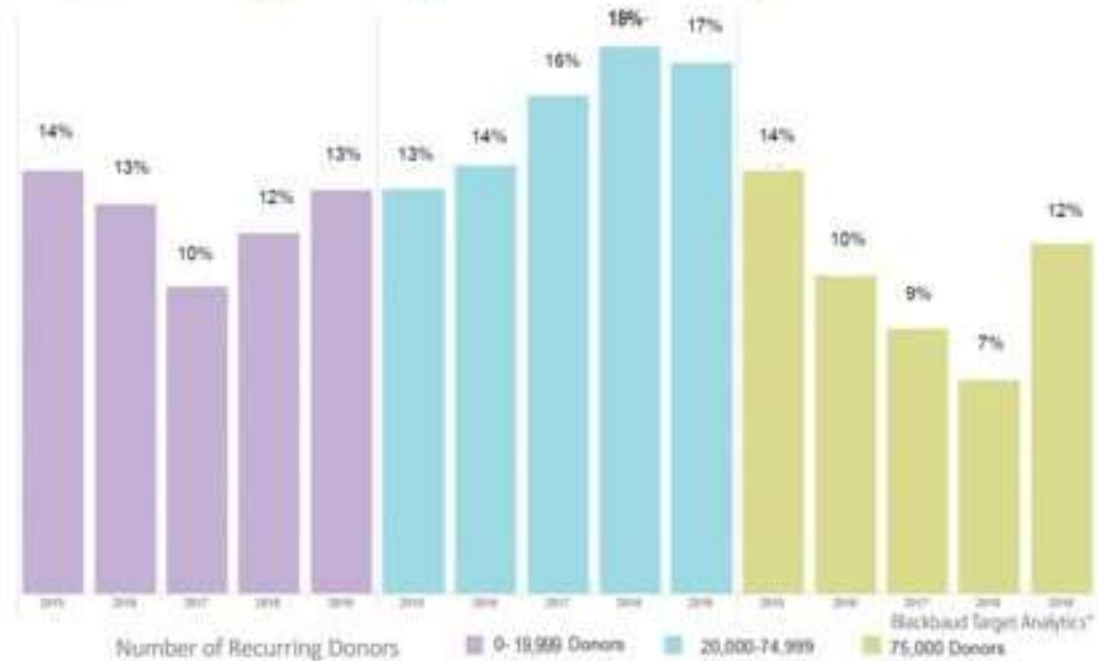
Acquisition, Cultivation and Retention Go Together

- 54% have unique contact streams for F2F sustainers
- 54% provide a welcome pack at the time of sign-up
- 54% send welcome test message
- 85% send welcome kits in mail
- 54% attempt to convert sustainers to EFT
- 92% have a recapture program



EFT/ACH Improves Retention Further

Direct Debit/EFT is a growing method of Payment



New recurring gift donors paying by EFT will retain at 10 – 15 percentage points higher than credit card donors.

Source: Blackbaud DonorCentrics Sustainer Benchmark Study 2019, 2018 data

Offer EFT Right Away



JOIN FRIENDS OF NPF

Friends of NPF are a special group of donors who provide on-going, monthly gifts that help form a steady resource we know we can count on. Your monthly support will help us protect historic sites and wilderness areas, connect people to our national parks, and engage the next generation of park stewards.

As a Friend of NPF, you will have direct access to NPF, receive special communications on national park projects, and will receive a discount to the Find Your Park store.

If you have any questions about a new, or current, membership with the Friends of NPF program, please contact us at friends@nationalparks.org.

Waiting for dmptwoptik.com...

01 DONATION 02 BILLING 03 **PAYMENT** 04 COMPLETION

PAYMENT TYPE*

CREDIT CARD **CHECKING ACCOUNT**

CREDIT CARD NUMBER: *

EXPIRATION DATE: * CVV NUMBER: *

10 2020

Captcha Image:

houmers

Change Image

SUBMIT \$5/MONTH DONATION NOW

I want to receive newsletters and messages via e-mail from the National Park Foundation. You may change your subscription at any time by selecting unsubscribe on any

Convert to EFT



Erica Waasdorp
30 Frazier Way
Marstons Mills, MA 02648-1866



June 10, 2020

Dear Erica,

Thank you for being a Habitat for Humanity HopeBuilder. Your ongoing generosity helps children and parents build better lives in decent, affordable homes. They — and we — are truly grateful for your regular donations.

Because you have shown such commitment to families who urgently need safe housing, you may want to know about a way to ensure your donations go as far as possible. It is called electronic funds transfer, or EFT, and it is a simple, secure and cost-free way to make a greater impact. It lowers our administrative costs, so more of your gifts go toward helping people who are eager to build Habitat homes of their own.

When you switch from credit card payments to EFT, your donations become a monthly gift that is securely withdrawn from your checking account. There are many benefits to making this change. We think you will find that EFT is:

- **Efficient.** You will help reduce processing costs, so that more of your contributions go toward helping families in need of secure housing.
- **Easy.** You won't have to update your credit card information when it expires. Your gifts will process securely and automatically.
- **Flexible.** You can change or cancel your donations whenever you choose.

Switching to automatic, monthly transfers from your checking account costs you nothing, but it accomplishes something incredibly powerful: It stretches your donations even further to help more families build strong foundations for brighter futures.

I hope you already know what an extraordinary impact you are making for children and parents who are eager to escape housing that is unsafe and deteriorating. With a little help, many more

(over, please)

P.O. Box 1088 • Americus, GA 31709-1088 • habitat.org • (800) 422-4828



Help more families in need of decent housing ...
without spending a single penny!

SWITCH TO EFT TO HELP MORE FAMILIES!

STEP 1:

- Yes, I want to switch my HopeBuilder gift from credit card to monthly EFT.

Pledge Amount: \$ _____

Erica Waasdorp
30 Frazier Way
Marstons Mills, MA 02648-1866

STEP 2:

- Provide your checking account transfer information.
 The enclosed check for this month's gift also authorizes

STEP 3:

Please sign below and return this slip in the enclosed envelope. Thank you!

Signature _____ Date _____

Pledge ID: rev-55989625
Current Payment Frequency: Monthly
Current Payment Method: Credit card
Designation: Global Impact

families will have the potential to build stable lives. Your ongoing contributions are helping them create better futures. Signing up for EFT can do even more.

Please consider switching to secure EFT monthly donations today. Simply fill out the attached reply form and return it in the enclosed envelope. Enjoy the convenience and help even more families discover the life-changing benefits of decent and affordable Habitat homes.

In partnership,

Jonathan T.M. Reckford
Chief Executive Officer

P.S. You can help make an even greater impact today — without spending a single penny. Switch to EFT and help more children and parents create better tomorrows in safe, adequate housing.

DHBM20062077400 1-62126615-01



“Great things are done by a series of small things brought together”

– Vincent van Gogh

For more information and resources



Erica Waasdorp

A Direct Solution

erica@adirectsolution.com

(508) 428-4753