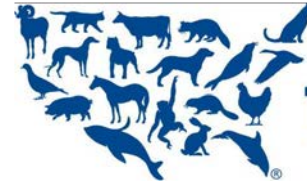


**Special
Olympics**



**THE HUMANE SOCIETY
OF THE UNITED STATES**

The Sustainer Connection: Offers that Work, and Lessons Learned

Panel Presentation & Discussion

DMAW

March 20, 2024

DonorVoice

The Behavioral Science Fundraising Agency

DMAW

Direct Marketing Association of Washington

Monica Muten

Senior Director, Direct Response Marketing

Special Olympics

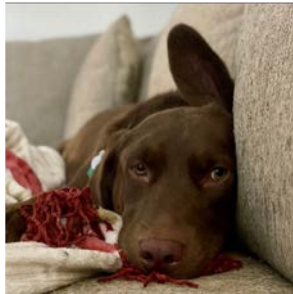


Monica Muten is the Senior Director, Direct Response Marketing at Special Olympics International and is a fundraising professional with more than twenty years of experience. Primary focus is on developing and driving strategy for the direct mail, telemarketing, and sustainer programs for SOI and SOI's 52 US State Programs.

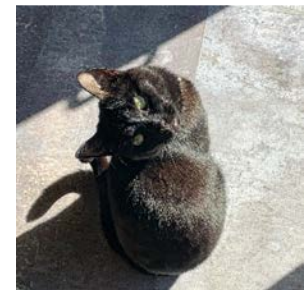
Monica lives in Accokeek, MD with her husband, three children and boxer, Tank.



Rachel Feldman, Director, Sustainer Strategies at The Humane Society of the United States



Rachel has 15+ years of experience in nonprofit fundraising and marketing, including several different roles throughout her tenure with the HSUS, Goodwill Industries International, and other nonprofit organizations. As Director, Sustainer Strategies for the HSUS, Rachel leads the strategic development and implementation of the HSUS sustainer acquisition, retention and cultivation strategies, with the goal of maximizing donor lifetime value. Rachel lives in Frederick, MD with her husband, three dogs (two of which are from HSUS rescues), and three cats.



About Jessica Sotelo

Senior Director, Membership, World Wildlife Fund



25 years of non-profit experience in marketing, fundraising, and communications, driving millions of dollars in annual revenue

Expertise in:

- membership stewardship and retention
- customer service
- eCRM administration
- fundraising across multiple channels including email, SMS, telemarketing, face-to-face, and direct mail

I enjoy gardening, cooking and dining out, going on weekend adventures, and playing board games

Seth Merritt

Vice President, Product Strategy



Fundraising and Advocacy consultant with over 20 years' experience deploying technology for causes.

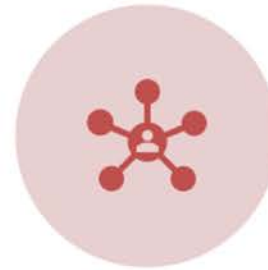
Seth has helped organizations raise money, mobilize supporters, influence policy, and do good in the world.



Has Done: product leadership, strategic consulting, fundraising, advocacy, research & analysis, business development, digital marketing, project management, and technology selection and adoption.



Has Served: national and local nonprofits, trade associations, public broadcasting, citizen advocacy groups, political campaigns, technology startups, religious organizations, and Fortune 50 corporations.



Background in Anthropology, multi-cultural childhood. Seeks explanations of human behavior through individual psychology and cultural context.

DonorVoice

The Behavioral Science Fundraising Agency

Monica Muten

Senior Director, Direct Response Marketing

Special Olympics

DMAW Sustainer Day
*The Sustainer Connection:
Offers that Work, and Lessons
Learned*

20 March 2024

Special Olympics



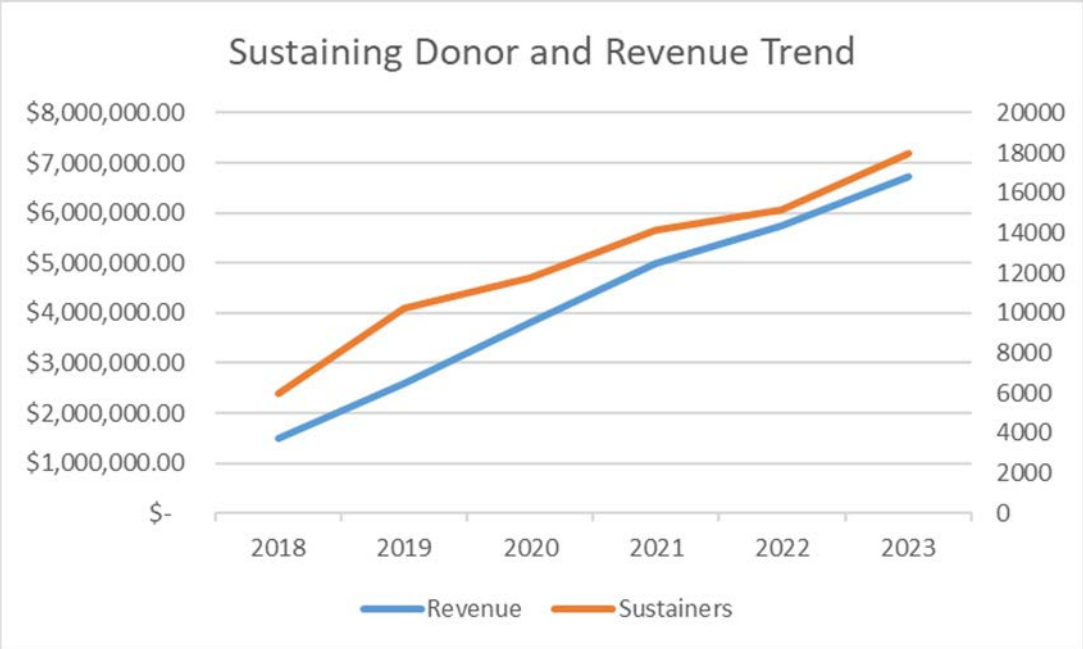
History of the SOI Sustainer Program



- SOI started recruiting monthly donors in 2014
- Initial growth through telemarketing conversion calls, organic digital acquisition and some digital advertising
- Launched mail invitation and check-writer program in 2016
- Launched a canvass test in August of 2017 in Chicago. Due to success, increased investment each year since. Currently in four markets
- Increased digital investment in 2019 adding Digital Fundraising Campaign (CTV)
- Sunsetting check-writer program end of 2023
- SOI currently has over 18,000 active sustainers



Program Growth

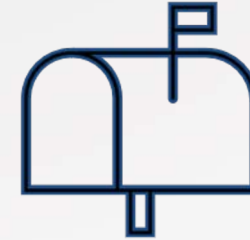


- With increased focus and investment into sustainer program, we've seen substantial growth in active sustainers and sustainer revenue growth. Sustainer revenue is now 12% of overall revenue
- Channel mix has shifted over time based on investment
- All channels evenly split in 2018
- Shift to larger % of canvass in 2019
- Digital driving 37% of all active sustainers in 2023 with declines in DM and TM

SOI's Journey Has Involved a Multi-Channel Approach



- Channel is used quarterly to convert existing donors to monthly givers & upgrade existing sustainers.
- High level of success converting new donors, high frequency donors, lapsed sustainers and 1x canvass sustainers
- Channel drives check payers as well as credit card donors and donors are typically older and give smaller monthly amounts
- One time gifts help offset expense to acquire sustainers



- Over time eliminated specific sustainer acquisition DM campaigns as we were getting low response rate and majority new check-writers
- Our focus in DM efforts has been instead adding check boxes and callouts in DM to acquire monthly donors more organically

Expansion Has Focused on Emerging Channels Driving Growth



- 3-year ramp up to expand this channel to a key area of focus for sustainer revenue
- Acquiring sustainers who are largely new to file and younger than other channels and program, helps diversify donor base (avg age 40)
- Offering non-monthly options has helped bring in more donors with higher retention (Annual/Quarterly)
- Created specialized stewardship journey to this group of donors to help improve retention



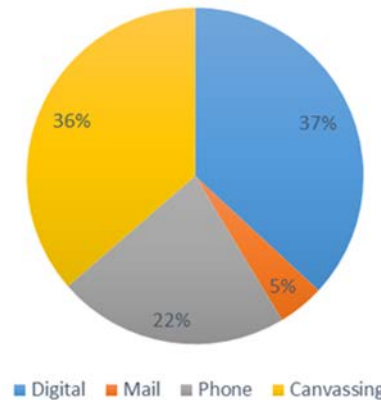
- 3-year ramp up on investment into CTV, digital ads, email conversion and other media buys to drive direct to sustainer acquisition as well as existing donor conversion
- Prioritizing sustainer over 1x gift on website donation page

Nine Years Later ...

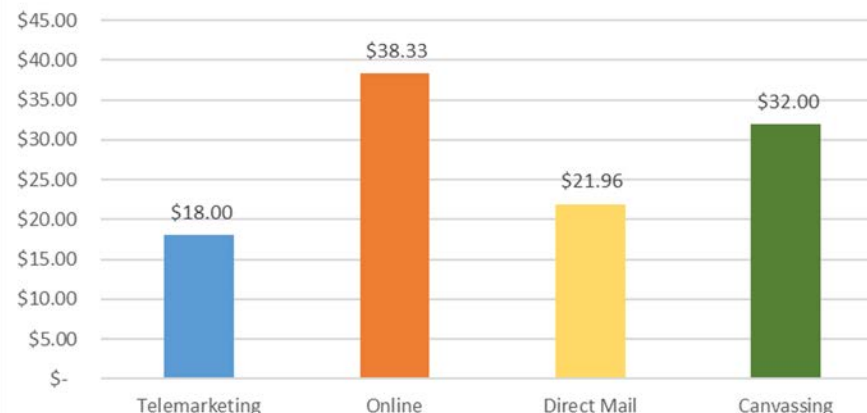


- SOI's program has diversified over the years with increased investment in canvassing and digital efforts
- Digital drives the highest monthly gift amount with DM and TM acquired driving comparable but lower monthly gift amounts
- Canvass acquired donors are typically younger and largely new to file, achieving another goal of new audiences in addition to the monthly pledge

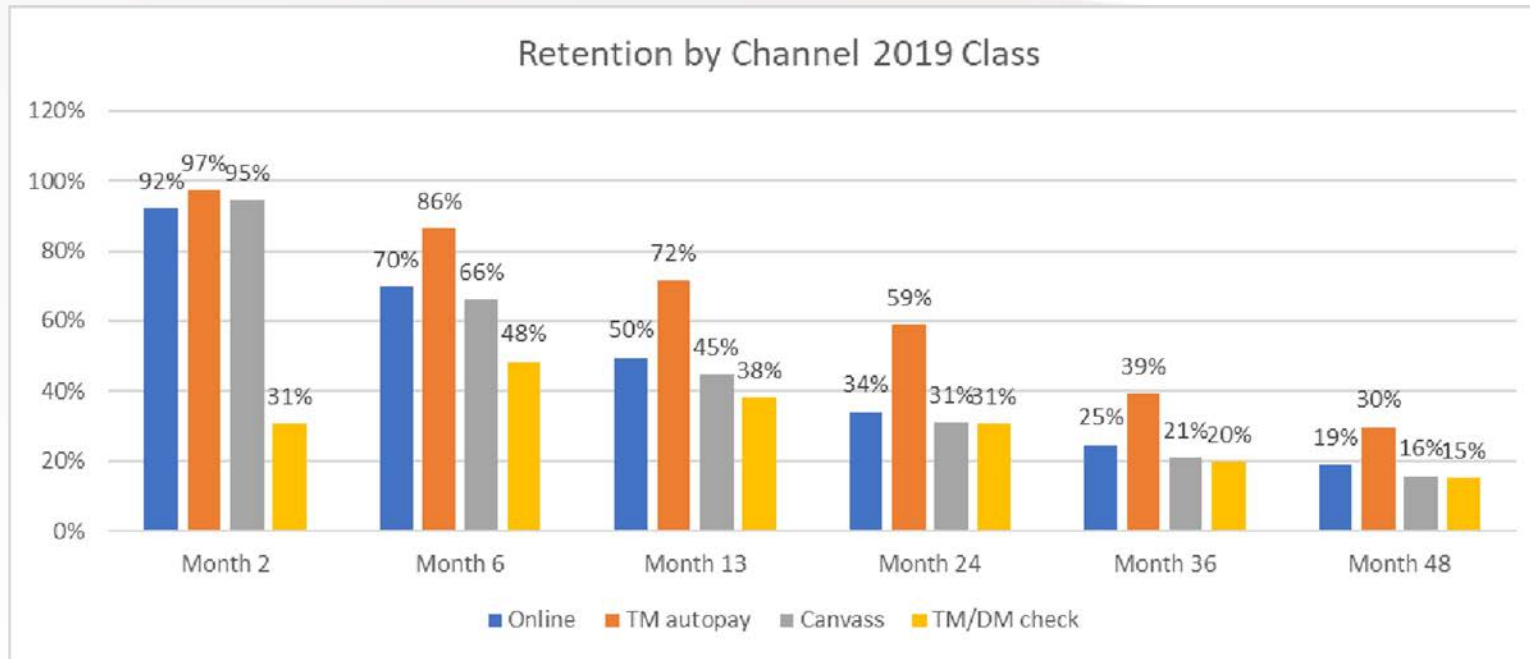
Sustainers by Channel



Monthly Gift by Channel



Retention Varies by Channel and Should be Considered When Making Investment Decisions



- TM acquired sustainers have the best retention rates for all our channels. SOI has large TM responsive file.
- Digital and TM breakeven in around 12-18 months while canvass still takes closer to 20-24 months
- We had ~10% of audience giving via check with low retention. At end of FY23, push check donors to convert to CC/EFT and sunsetted check-writer program

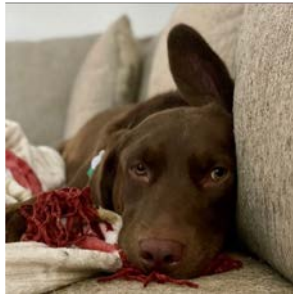
Rachel Feldman

Director, Sustainer Strategies

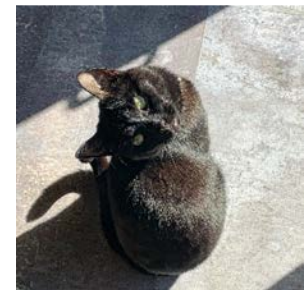
The Humane Society of the United States (HSUS)



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Giving donors choices...

Payment Options

The Humane Society of the United States
[VIEW COLLATERALS](#)

TIME: 00:43, avg 05:00

DONOR DETAILS | **DONATION** | **PAYMENT** | **LEGAL**

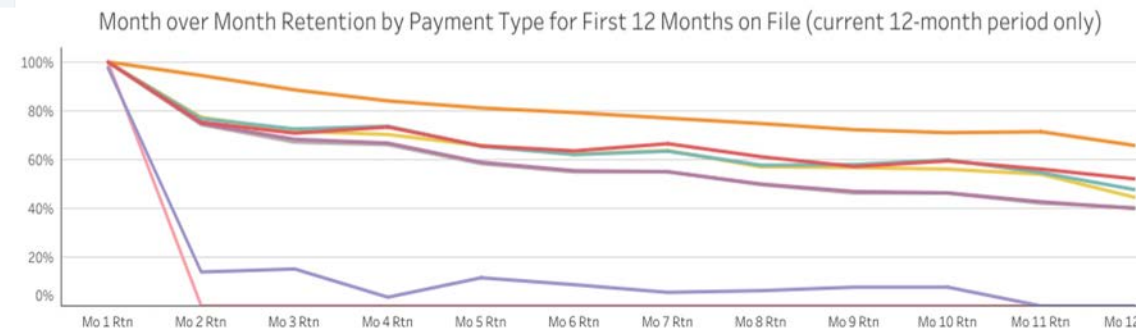
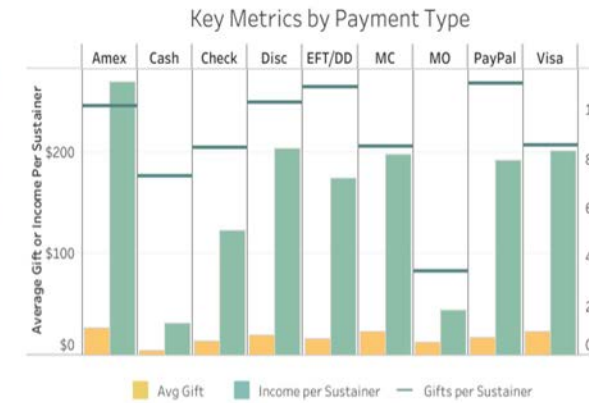
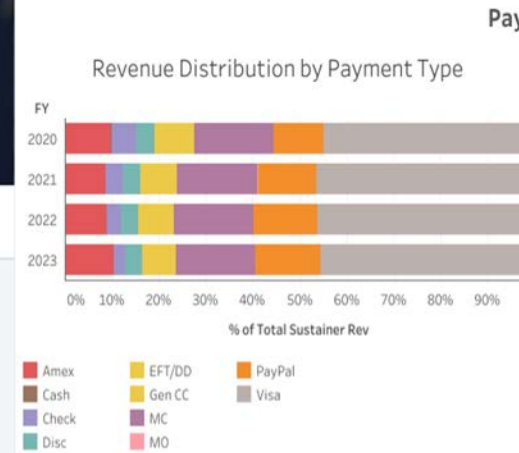
I wish to make regular contributions to:

Recurring

Monthly Quarterly Bi-Annually Annually

PAYMENT SECURE

CREDIT BANK PAYPAL



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HSUS: This giving season, even a small gift can go a long way for animals! ❤️ Most of the pets we rescue have never experienced loving homes, the comfort of a warm blanket or the fun of playing with a new toy. See what your special one-time donation could do for an animal in need and select your gifts here: <http://hsus.ms/2f79awaos>
-Lauren@HSUS

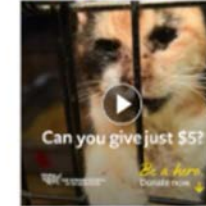
Gifts	1,520 (+10%)
Revenue	\$96,802 (+61%)
Avg. Gift	\$63.69 (+\$20.10)
New Mo. Donors	23 (-52%)

Adjust the ask

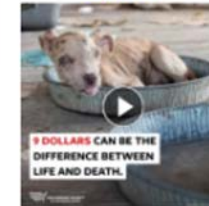
Low Dollar Asks

- Hero ✓ 💰
- Big Text ✗ 😬
- Last Chance ✗

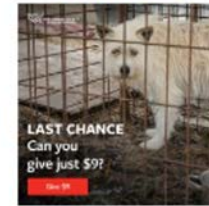
Be a Hero



Big Text



Last Chance

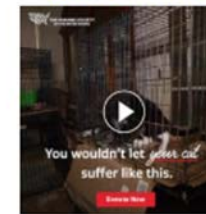


Suffer Like This ✓

Percent will care ✓

Scratch out text ✗ 😬

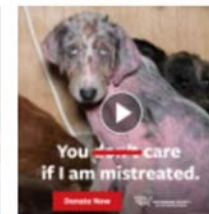
Suffer Like This



Percent Will Care



Scratch Out Text



2x Match Ends Soon GT ✓

3X Challenge LC

- For animals like ✓
- Ends soon ✗

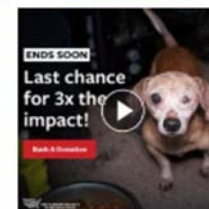
2X Match



3X for Animals like..



3x Ends Soon



Demonstrate Impact

2023 Agenda for Animal Protection



Action plan prepared for:

<<SALUTATION>> <<FIRSTNAME>> <<LASTNAME>>
<<CITY>>, <<ST>>

This 2023 Agenda for Animal Protection outlines the Humane Society of the United States' top animal protection priorities for this year. By investing in our programs and campaigns today, you will help end animal cruelty and suffering on a global scale while opposing efforts to roll back hard-won gains for animals. Thank you for your dedication to the fight for a more humane world for all animals.

1255 23rd Street, NW, Suite 450, Washington, DC 20037 humanesociety.org

Rescuing and caring for animals in crisis

Our Vision: Our Animal Rescue team will continue to expand its capacity to respond to large-scale cruelty or neglect cases and disasters.

The Animal Rescue Team is comprised of highly trained professionals who are ready to deploy at a moment's notice to save animals in crisis. Even before disasters happen, they work with local agencies to develop pre-storm preparations and pet-friendly evacuation plans, also securing food and other resources and emergency field rescue for animals caught in harm's way.

The team also works with law enforcement to investigate the worst cases of animal abuse nationwide — helping rescue thousands of animals from animal fighting operations, disasters and large-scale situations of cruelty and neglect. Your support makes all this possible. Our Animal Rescue Team recently assisted federal and state law enforcement officers in rescuing 70 dogs from what might be the largest takedown of an alleged dogfighting operation in South Carolina history. Several of the dogs were in critical condition with severe, untreated injuries, and many were dehydrated and emaciated.

But thanks to donors like you, these dogs received the care and veterinary treatment they needed. After spending their lives kept on heavy chains and allegedly being forced to fight, they finally knew love, care and kindness.



2022 victory for animals: Relocated 3,776 beagles

In one of the largest operations in our organization's history, we transferred the beagles from a breeding facility in Cumberland, Virginia, at the request of the U.S. Department of Justice. The dogs were relocated to a number of shelter and rescue partners across the country. Instead of ending up in laboratories or being forced to produce more puppies in a facility with documented violations of the Animal Welfare Act, many of these dogs have already been adopted into loving homes.



Thanks to people like you, our Animal Rescue Team relocated 3,776 beagles from the Envoigo facility in Cumberland, Virginia, where thousands of these dogs were being bred for laboratory testing. Many of these dogs have already been adopted into new loving homes.

HSUS action items to continue fighting for animals:



Develop and maintain additional Memorandums of Understanding with state and local agencies



Host law enforcement trainings on cruelty investigation throughout the country



Expand the number of employees on staff who are trained responders

Donate to help animals in need

Your generosity helps rescue animals from heartbreaking situations and supports all our lifesaving work. You can bring joy to animals in need with special gifts that can change their lives and show them just how loved they are.



Could supply treats for a dog or cat

- 0 +
Quantity

ITEM TOTAL: \$0



Could give toys and a warm blanket to a neglected dog or cat

- 0 +
Quantity

ITEM TOTAL: \$0



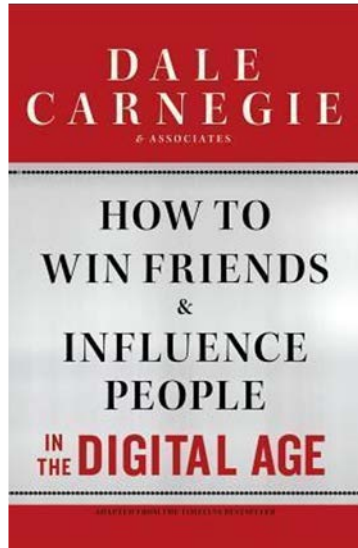
Could transport a rescued dog or cat to an HSUS Shelter Partner for adoption

- 0 +
Quantity

ITEM TOTAL: \$0

+10% # of gifts
+61% Revenue
+\$20.10 Avg. Gift

88-year-old suggestions



How to Gain & Maintain Trust



Avoid arguments	Never say "You're Wrong"	Admit faults quickly & emphatically	Begin in a friendly way	Access affinity
Surrender the credit	Engage with Empathy	Appeal to noble motives	Share your Journey	Throw down a challenge

How to Create a Lasting Impression



Take interest in others' interests	Smile	Reign with Names	Listen Longer	Discuss what matters to them	Leave others a little better

The 3 Engagement Essentials

Bury your Boomerang	Affirm what's good	Connect with Core Desires



Jessica Sotelo

Senior Director, Membership

World Wildlife Fund (US) WWFUS

About Jessica Sotelo

Senior Director, Membership, World Wildlife Fund



25 years of non-profit experience in marketing, fundraising, and communications, driving millions of dollars in annual revenue

Expertise in:

- membership stewardship and retention
- customer service
- eCRM administration
- fundraising across multiple channels including email, SMS, telemarketing, face-to-face, and direct mail

I enjoy gardening, cooking and dining out, going on weekend adventures, and playing board games

Who are WWF's sustainers?

Monthly members, or sustainers, are donors who set up automatic monthly donations of \$3+ for an indefinite period. They provide a steady stream of unrestricted revenue for WWF and retain at nearly twice the rate of one-time donors.

- WWF monthly members are called WWF Heroes
- 10% of all new donors are sustainers who provide nearly 30% of the annual membership revenue
- 96.2% of them give online



HEROES

Making our donors feel like HEROES

“You make me feel like a **superhero**... Saving the world one ecosystem at a time! ;)”

“I believe that the wildlife needs a **hero**. And this (donating) is the best way I know how to help.”

“I support WWF because I think that ... helping the environment is **heroic**.”

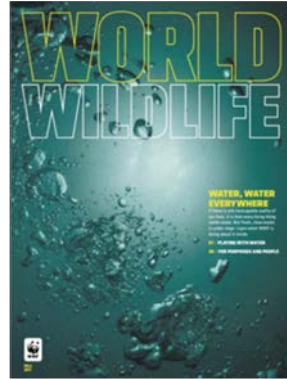
WWF Heroes branding

Objectives:

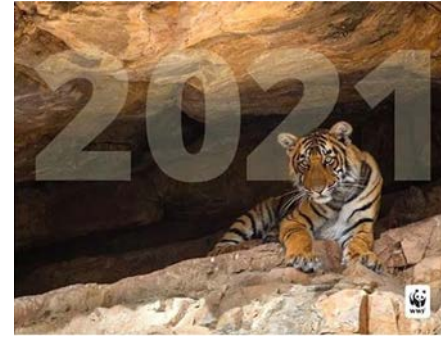
- To foster a sense of belonging, inclusivity, and accomplishment for monthly donors
- To differentiate WWF monthly membership from other nonprofit memberships
- To communicate monthly membership consistently across channels
- To increase acquisition and retention rates for monthly membership



Monthly membership benefits



Quarterly issues
of *World Wildlife*
Magazine



Annual WWF
Calendar

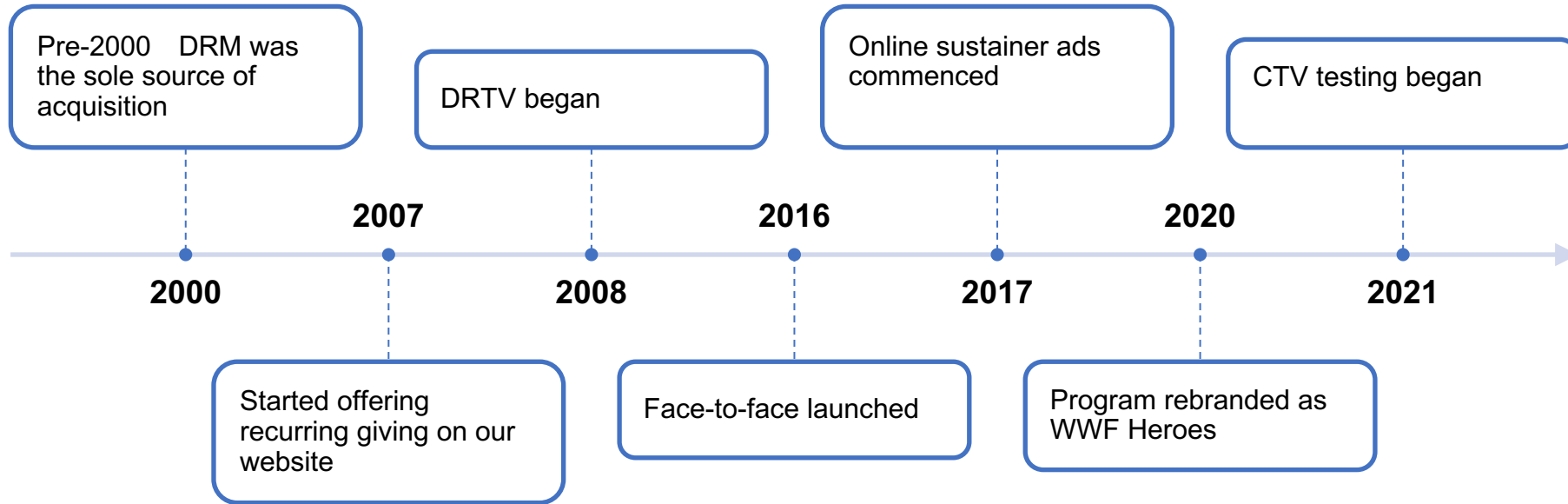


Exclusive *Member Update* emails

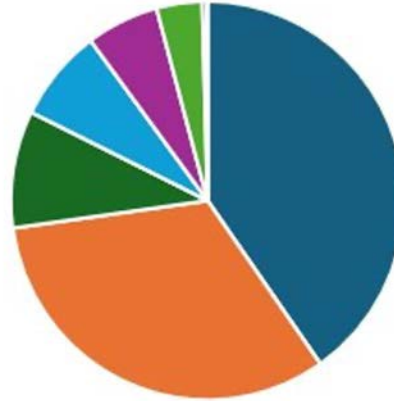


Knowing that you are
a hero for nature

History and growth of the sustainer program



Today's acquisition sources



■ DRTV ■ Online General ■ Email ■ Online Ads ■ F2F ■ DRM ■ SMS ■ CTV



BE NATURE'S HERO

You will help protect life on our planet when you join WWF Heroes, our special community of monthly donors who keep endangered species safe from extinction and conserve critical habitats—all year long.

Whether you give \$5 or \$25 per month, you'll be a hero for wildlife, nature, and people around the world. And you'll be a hero to us.

To join our community of WWF Heroes, visit [wwf.org/hero](#)

World Wildlife Fund
Sponsored · ...

All around the world, wildlife are looking to you for support. Will you protect nature 365 days a year?

WORLDWILDLIFE.ORG/GIVE
Step Up Today | Become a Monthly Mem... Donate Now

WWF HEROES Team
1250 24th Street, NW
Washington, DC 20037

[FULLNAME], they need a hero like YOU to survive. See inside for your personal invitation to make a HEROES difference.

[FULLNAME]
[ADDRESS 1]
[ADDRESS 2]
[CITY, STATE ZIPCODE]

Make Your Gift

You can be the next WWF Hero

HEROES

Hi Sarah,

At WWF, we have a passionate community of people who—like you—love animals, care about the environment, want to protect the planet for future generations, and are dedicated to making a difference. We call them WWF Heroes.

Today, you can be our newest hero! I would be honored to have you [join our special group with your monthly gift.](#)

As a WWF Hero, you'll provide crucial support for conservation every day. Giving monthly is the most effective—and easiest—way to save endangered wildlife, protect rain forests, and curb the climate crisis. **It's the best way to be a champion for our planet.**

Give monthly + be a WWF Hero

DRTV Creative



A world without elephants
is unimaginable

Story



Ask / Premium



TAKE ACTION TODAY
ONLY \$12 A MONTH

 **WWFheals.org**
1.800.497.5038

  **JOIN NOW**
\$12/month



ADOPTION KIT
FREE WHEN YOU DONATE NOW

Be the voice
for those who have no voice

CERTIFICATE OF ADOPTION

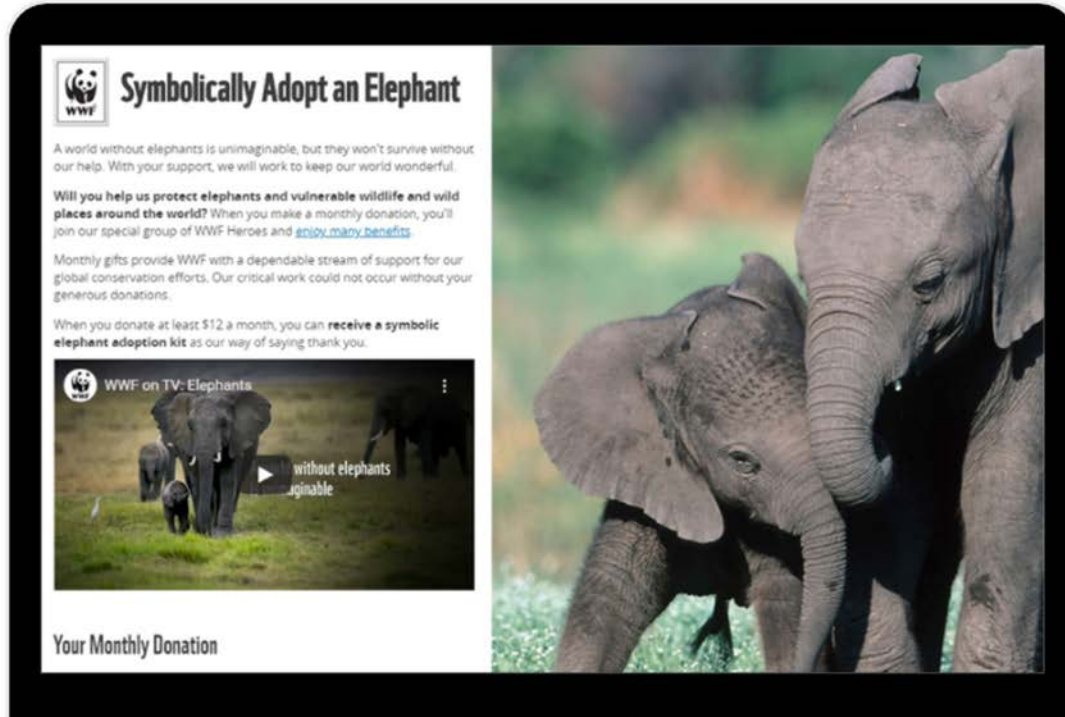
Just 2021

Your donation will be used in general support of WWF's global conservation efforts

 **WWFheals.org**
1.800.497.5038

  **JOIN NOW**
\$12/month

Ways to Donate



Stewardship

- Email welcome series
- Welcome calls for F2F donors
- Monthly dedicated stewardship emails
- WWF Heroes landing page with information on their impact and other assets
- Dedicated customer service with unique inbound call line and email address (heroes@wwfus.org)
- Access to a self-service hub to manage giving

The screenshot displays the WWF Heroes website interface. At the top, there is a navigation bar with links for 'OUR WORK', 'GET INVOLVED', 'ABOUT US', 'DONATE', and 'ADOPT'. Below the navigation is a large hero image of two elephants in a savanna. The main content area features a 'Fun fact of the month' section with a polar bear image and a 'WWF Heroes Wallpaper' section. A 'What do other Heroes think?' section contains four quotes from donors: Andy, MO; William, AL; Miranda, KS; and Cheryl, CO. Below this is a 'Where are you making an impact?' section with a world map showing orange dots in various locations. At the bottom, there is a 'Want to make changes to your gift/payment info?' section with a button to 'View your account info'. The website uses a color palette of orange, teal, and white.

Current and future plans

Acquisition

- Telemarketing
- Postcards – with QR codes!
- CTV

Retention and preventing churn

- Upgrade asks (via email, SMS, and telemarketing)
- Modeling targets for email outreach
- Retargeting online ads for lapsing/canceled sustainers



I just checked and unfortunately your monthly gift is still not processing successfully.

Mr. [REDACTED] as a WWF Hero, will you take just two minutes to reconfirm your information and resume your monthly gift? I don't want to lose you as part of our community of passionate supporters.



All you need to do is **reach out to our Member Solutions team at 833-993-4376, go to worldwildlife.org/confirm, or scan the QR code on this card.**

As a token of our appreciation and for taking time to reconfirm your giving, I invite you to choose a free umbrella or cooler bag.

Thank you for being a part of our amazing WWF community and for your ongoing dedication to nature.

With heartfelt thanks,
Jessica
Senior Director, Membership

worldwildlife.org/confirm

**We apologize if you receive multiple notices as our messaging may overlap online and in the mail.*



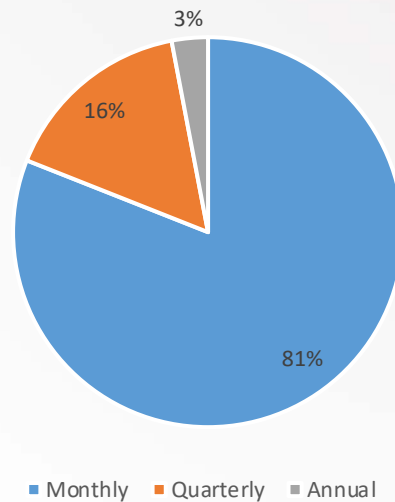
Thank you

Fun Facts & Follow Up Questions

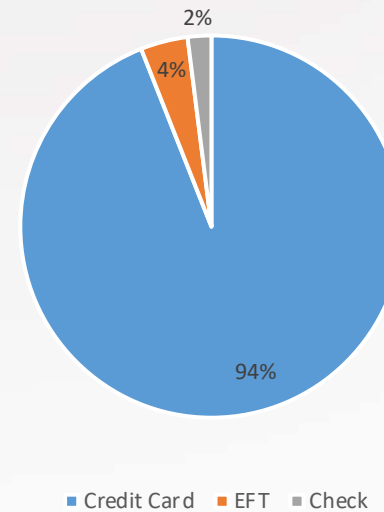
Sustainer Giving by Frequency & Payment Method



Sustainer Giving Frequencies



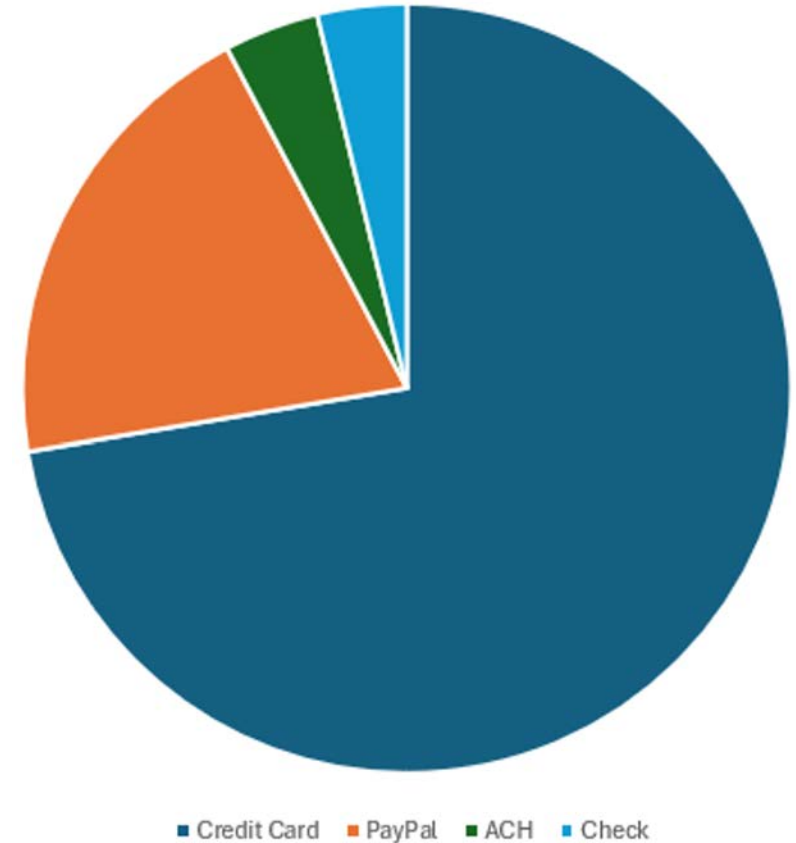
Sustainer Payment Method



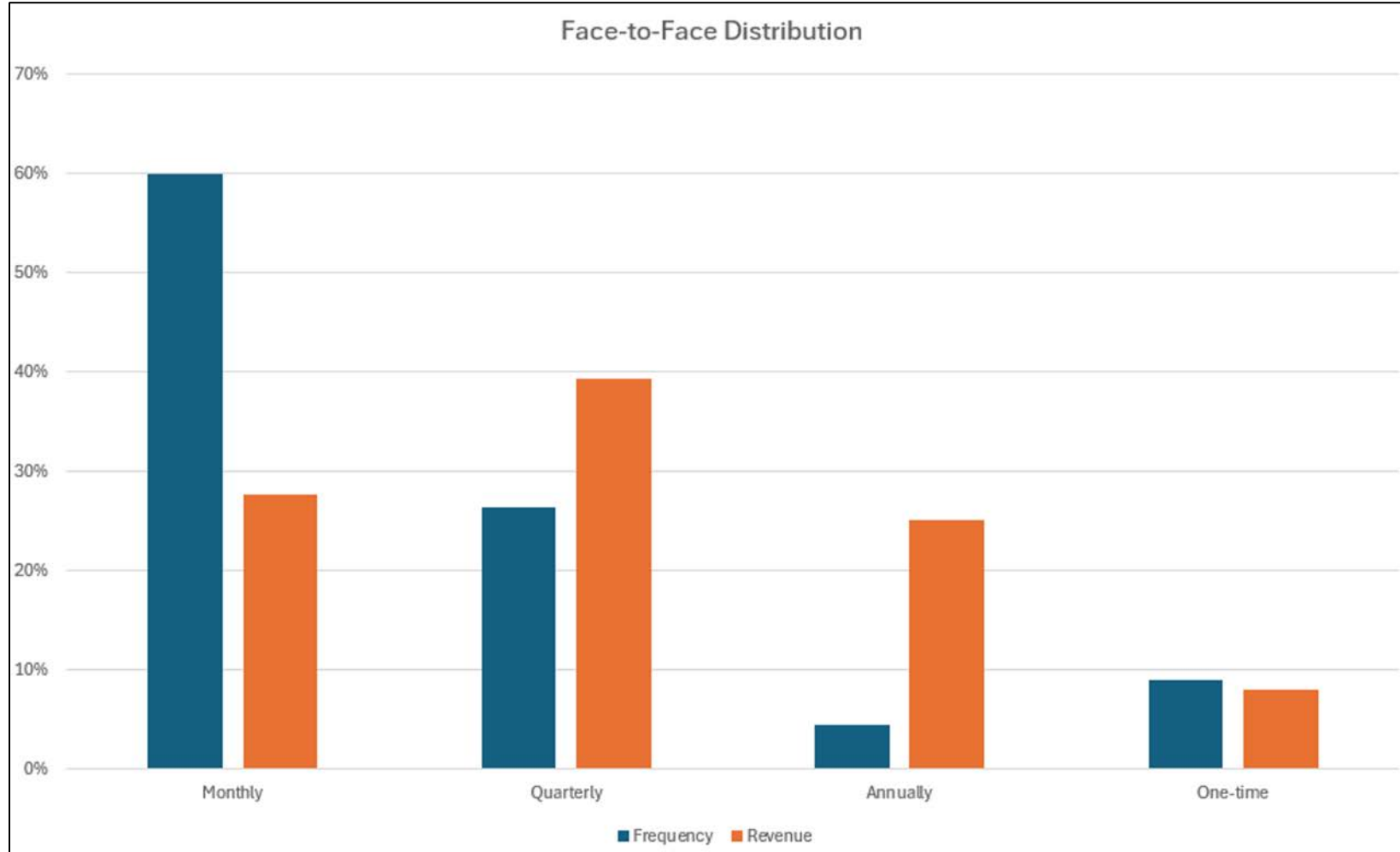
- Majority of sustainer gifts acquired become monthly sustainers. Non-monthly options are offered mainly in canvassing, with a small test done in TM.
- The majority of sustainer gifts are made via credit card. Two conversion campaigns each year. Check program closed at start of FY24.

Fun Facts (WWF)

Credit card is the most common payment method, followed by PayPal

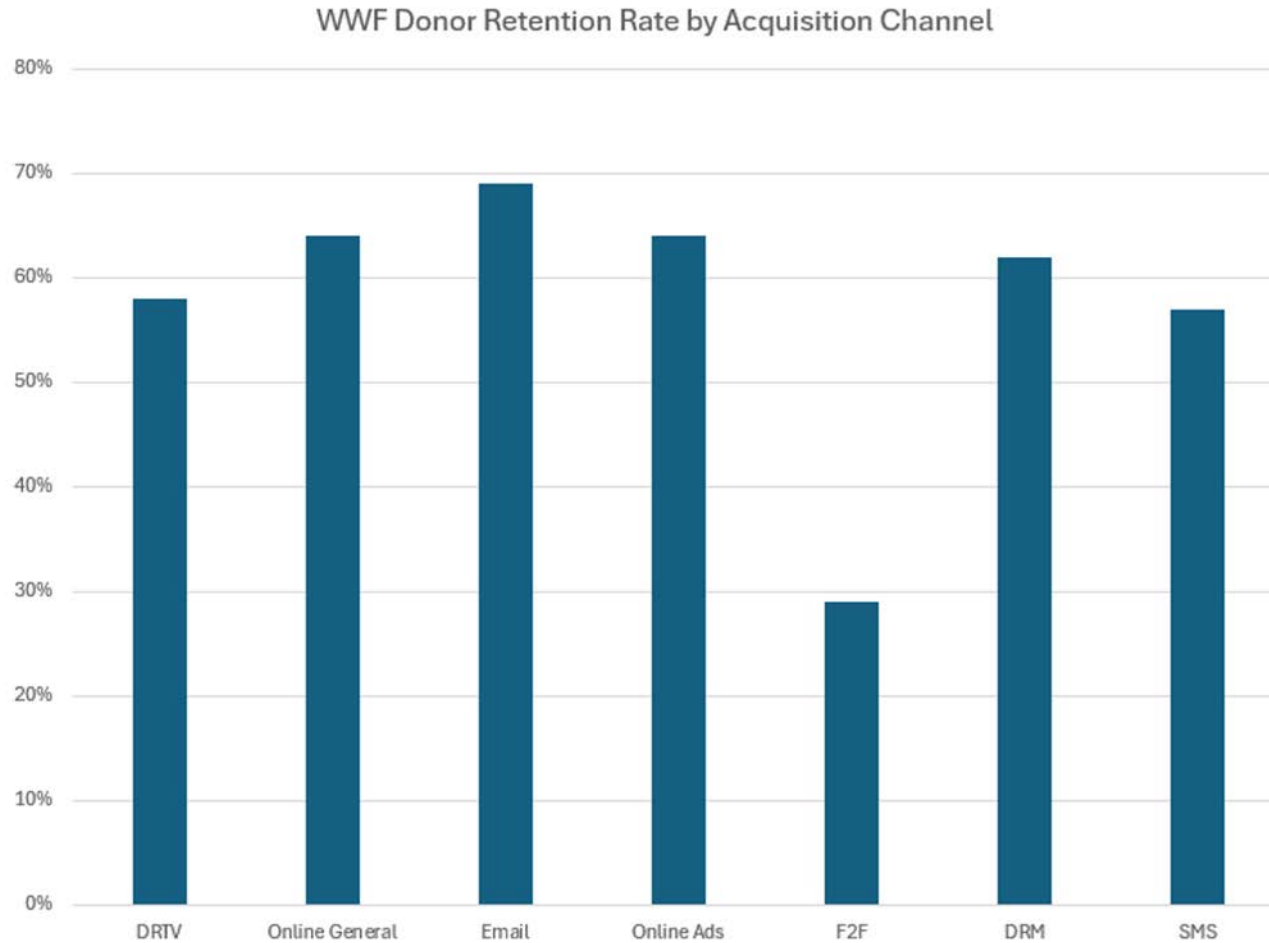


Fun Facts (WWF)



Face-to-face donors are younger, and give at varying frequencies

Fun Facts (WWF)



(month 13)

...but their retention rate is also the lowest

Fun Fact - HSUS


let us cover yours




Photo by alexei_tm/iStock.com



Sign up for text message alerts

 THE HUMANE SOCIETY OF THE UNITED STATES

Tell us where to send your T-shirt



We appreciate your support! As our way of saying thank you we want to send a Humane Society of the United States branded T-shirt. Please fill out the information below so we can send you your gift. Thank you again for all your support and standing with us to fight for all animals.

Please allow 4-6 weeks for your shirt to be processed and shipped.

T-shirt size*
Please select response *

First name*
[input field]

Last name*
[input field]


Email address*
[input field]

Street address*
[input field]

City*
[input field]

State*
Select a state *

Zip code*
[input field]

I'm not a robot 

Submit

For a F2F donor to qualify for the Humane Hero shirt, they must retain past M3. Email and text will then be sent to collect shirt size and shipping address.

Donors who opt-in to receive the shirt retain over 20% points better through M13!

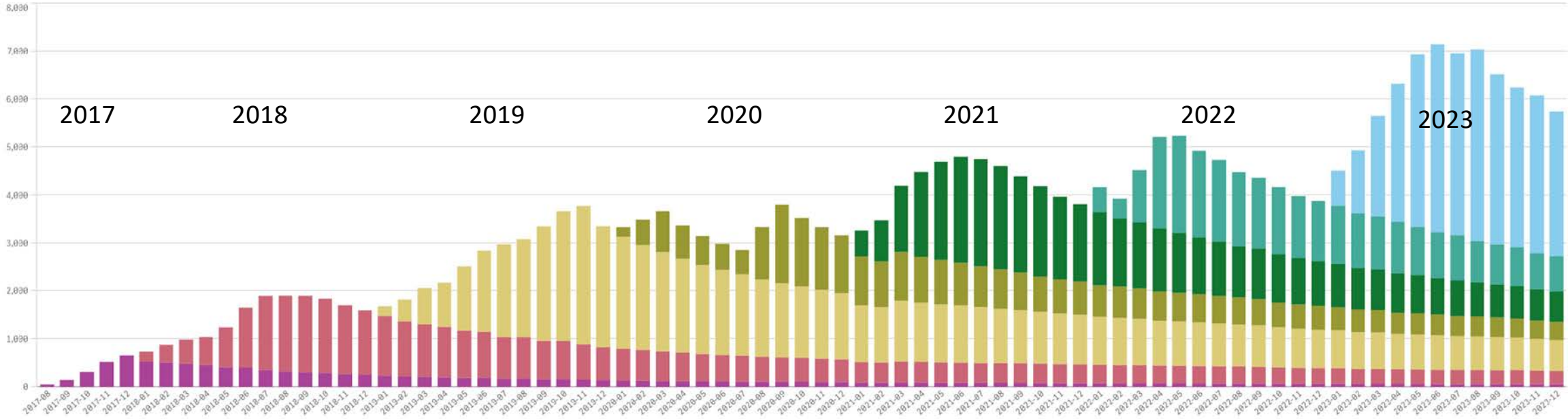
DonorVoice

Sustainer Retention & Acquisition

DonorVoice

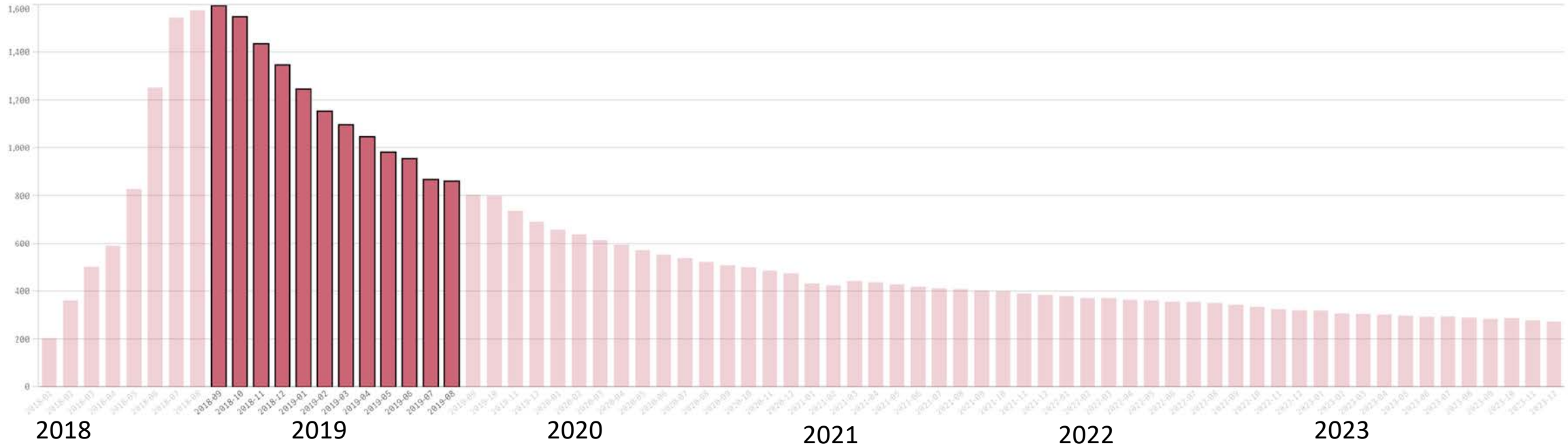
The Behavioral Science Fundraising Agency

Building a sustainer program: many mountains to climb...



Acquisition vs Retention: visualized

New monthly donors:
2018 Face-to-Face signups



The Behavioral Science Fundraising Agency

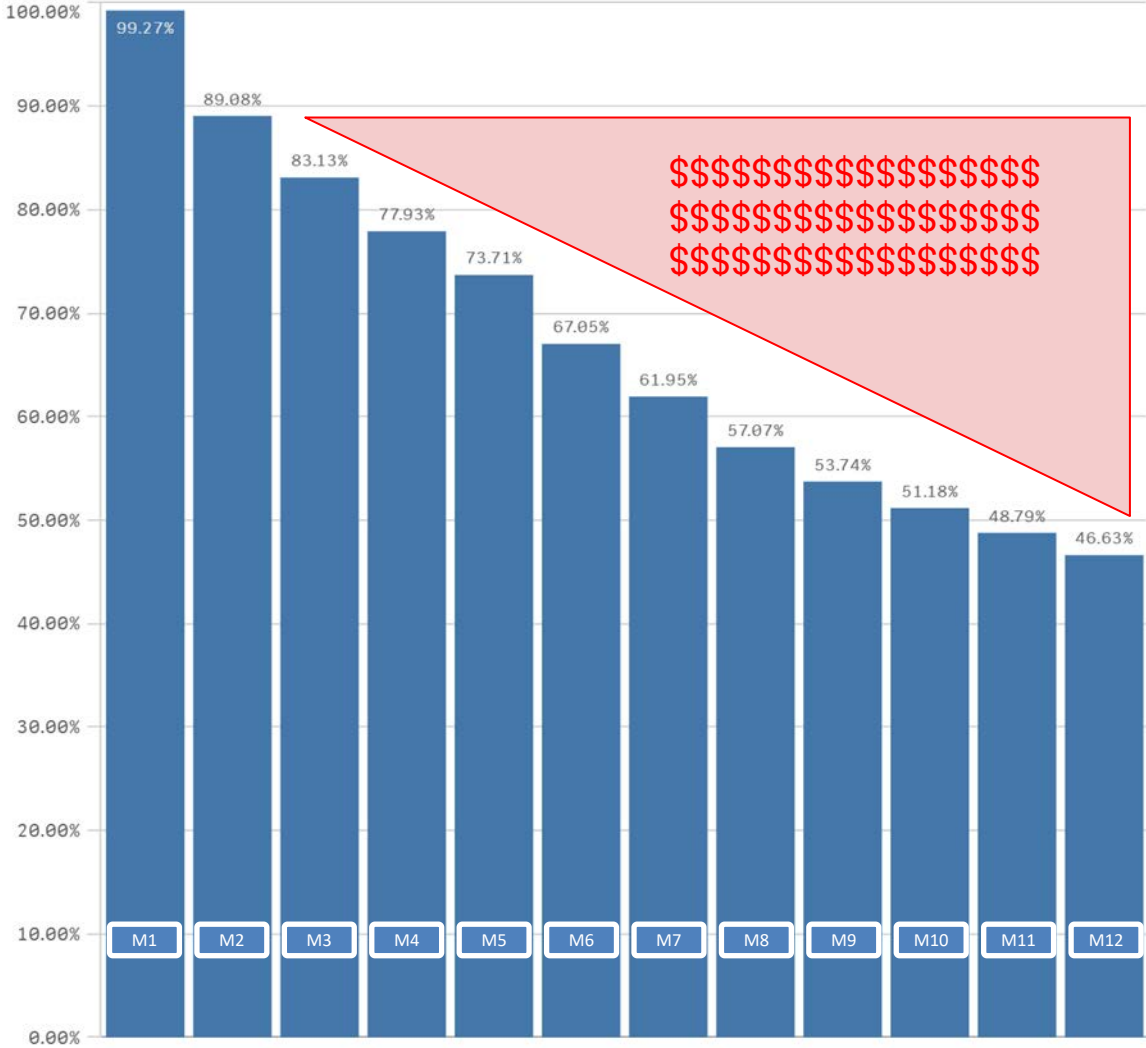
Sample 12-month retention: F2F

Easy Come, Easy Go?!?

Not much is easy about Face-to-Face fundraising, but in the broader landscape of acquisition, it is one of the “easiest” ways to find new donors.

Bad-fit donors are costing you \$\$!

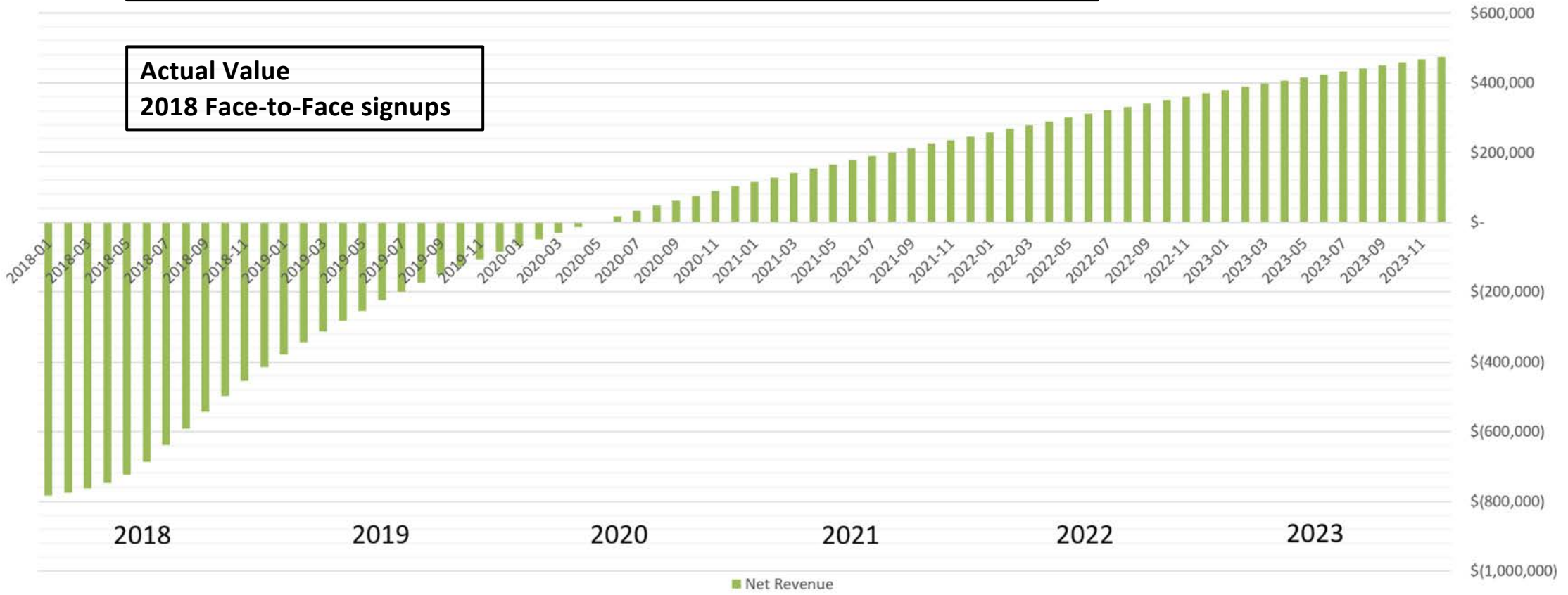
The way to “flatten the curve” is to **measure experience** and **understand donor motivations**.



Net revenue: playing the Long Game

Breakeven:	~32 months (June 2020)
Acquisition Cost:	~\$790,000 (2018 cohort)
Net Revenue:	~\$475,000 (Year 5)
Return on Investment:	~\$1.60 (Year 5)

Actual Value
2018 Face-to-Face signups



Retention Starts at Acquisition

Commitment

What if she is already more loyal to the charity than him?



Satisfaction

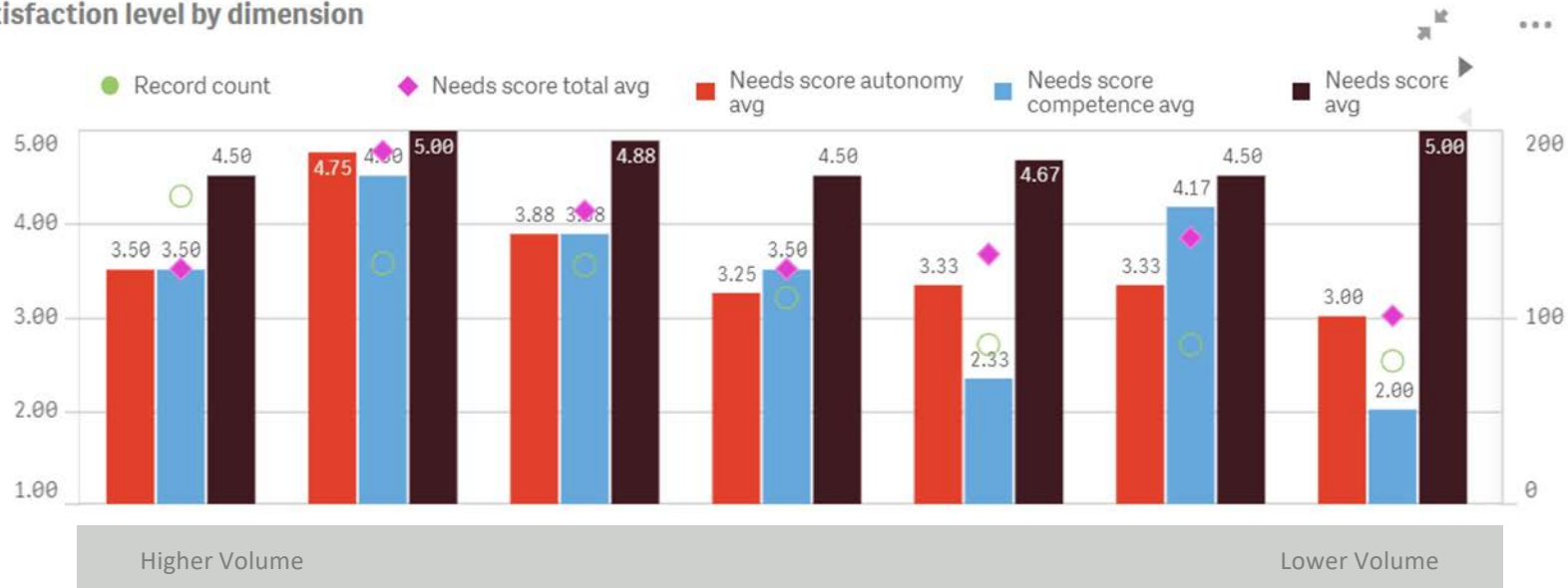
What if he has a really good experience and she has a bad one?

Identity

What if she has a personal, direct connection to the mission and he doesn't?

Are we meeting donor needs?

Satisfaction level by dimension



Autonomy:

“Am I in control? Am I just doing this out of obligation or to avoid conflict?”

Competence:

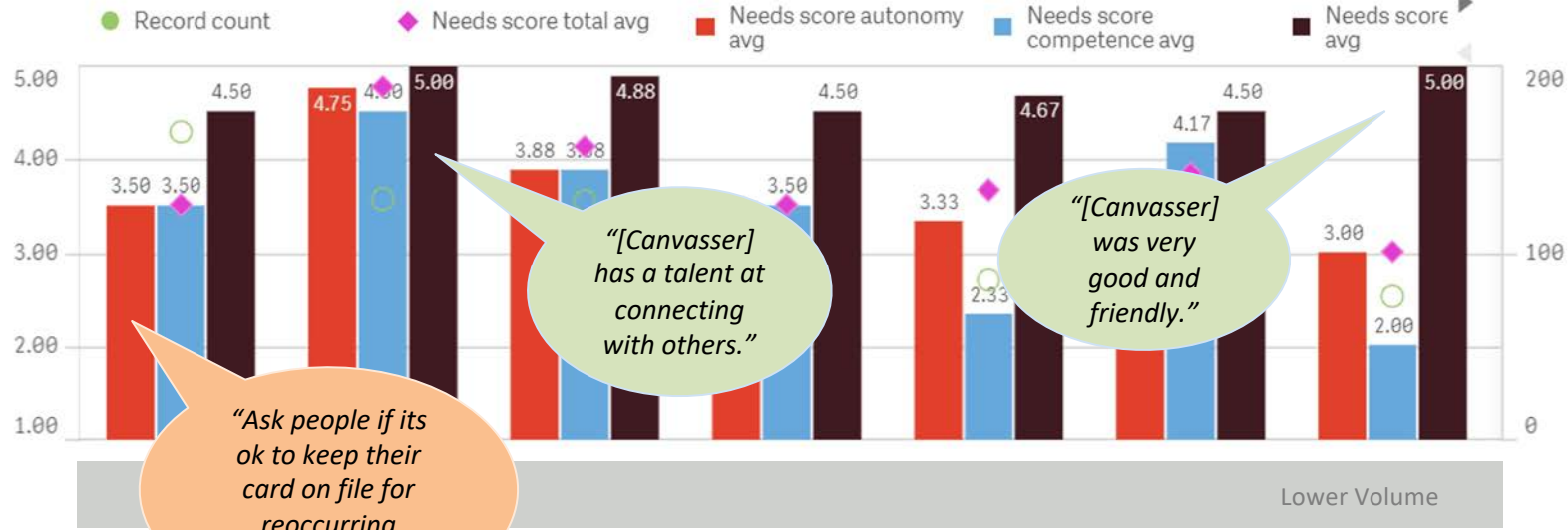
“Am I making a difference? What is the real-world impact of my \$25/month?”

Relatedness:

“Am I part of something bigger? Do I belong?”

Are we meeting donor needs?

Satisfaction level by dimension



Autonomy:

"Am I in control? Am I just doing this out of obligation or to avoid conflict?"

Competence:

"Am I making a difference? What is the real-world impact of my \$25/month?"

Relatedness:

"Am I part of something bigger? Do I belong?"

In Practice: collecting Identity (at signup)

Why Do You Give?

Census-level data can be used to tailor downstream communications, make them more relevant, and increase retention.



Asking for Feedback (after signup)

Subject: How was your experience?

Dear Josh,

Thanks so much for speaking with our fundraiser, Jessica Arneson.

As one of our supporters, your opinion matters to us. We'd love to hear how your recent experience with our fundraiser was; whether it was good, bad or anything in-between.

Please join other kind supports and [click here](#) to take our 1 minute survey to provide your important feedback. You'll also have a chance to share any comments you wish.

Thank you,

Lauren Yuhas

Monthly Giving Manager

P.S. If you ever need any information or support, then please get in touch at 1-800-AMNESTY or email aimember@aiusa.org. We'd be happy to help in any way we can.

As a supporter, you make all the difference by helping us improve and ultimately, be more successful in our shared goal of campaigning for a world where human rights are enjoyed by all. If you'd rather not hear how you're helping, you can unsubscribe from all of our email communications by [clicking here](#).



Please tell us how true each statement is about your experience with our fundraiser.

	Not at all true	Not true	I'm not sure	True	Very true
The fundraiser was too pushy.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The fundraiser and I got along.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I felt I could make a positive difference.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The fundraiser respected the fact it was my decision.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The fundraiser was friendly.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I felt a sense of accomplishment after our interaction.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Which of the following best describes you?

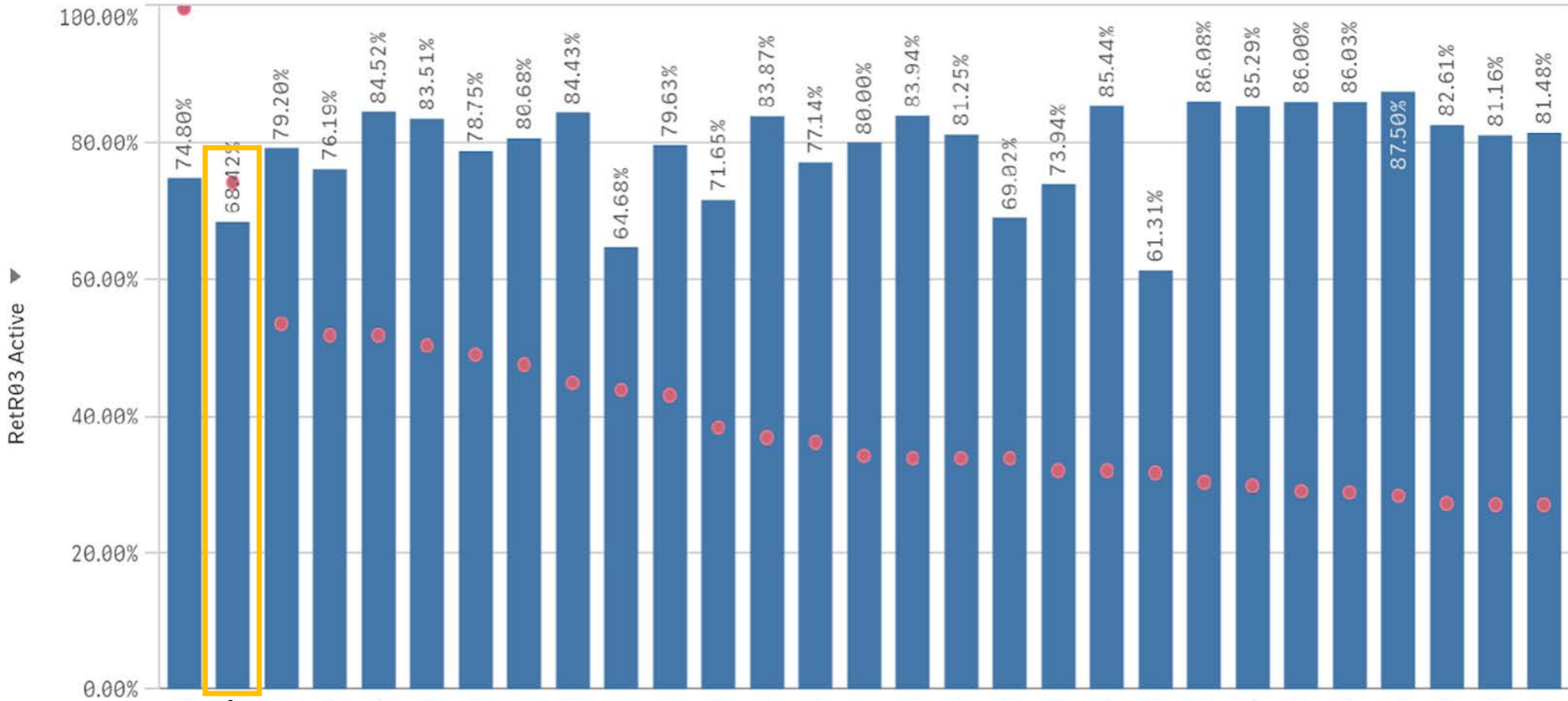
- I will definitely continue my support.
- I will probably continue my support.
- I might continue my support.
- I probably won't continue my support.
- I definitely won't continue my support.

Is there anything else you'd like to share with us today?

Metrics combination by dimension

Total donors: 24,017

Retention at the Source



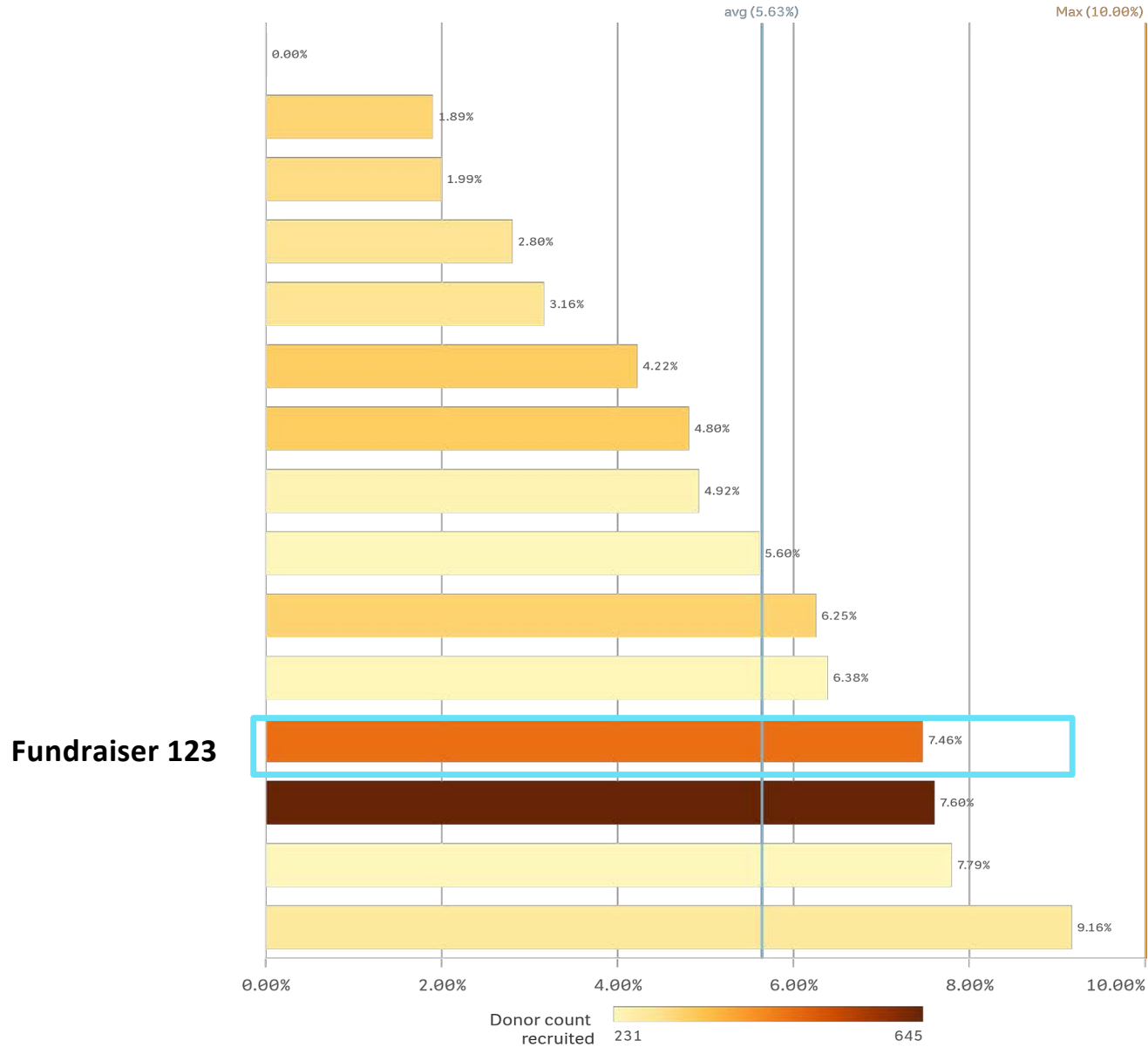
Fundraiser 123

Recruiter By Actual 3 Month Retention

– Driving Through Rearview Mirror

Donors at high risk of leaving

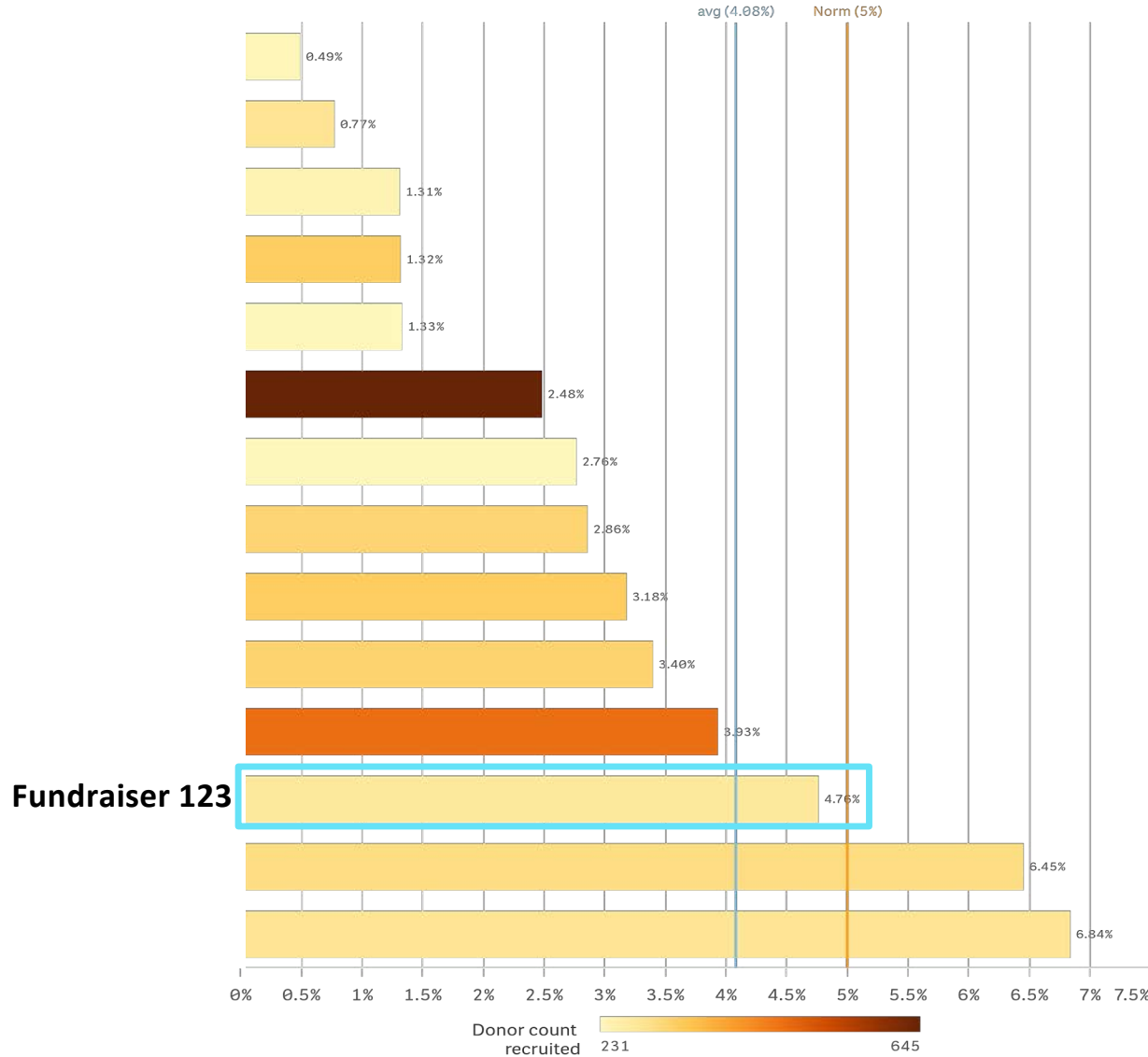
Limited to recruiters who recruited more than 231 donors.



Percentage Signups At High Risk – Driving Car Through Windshield

Bounces for survey invite emails

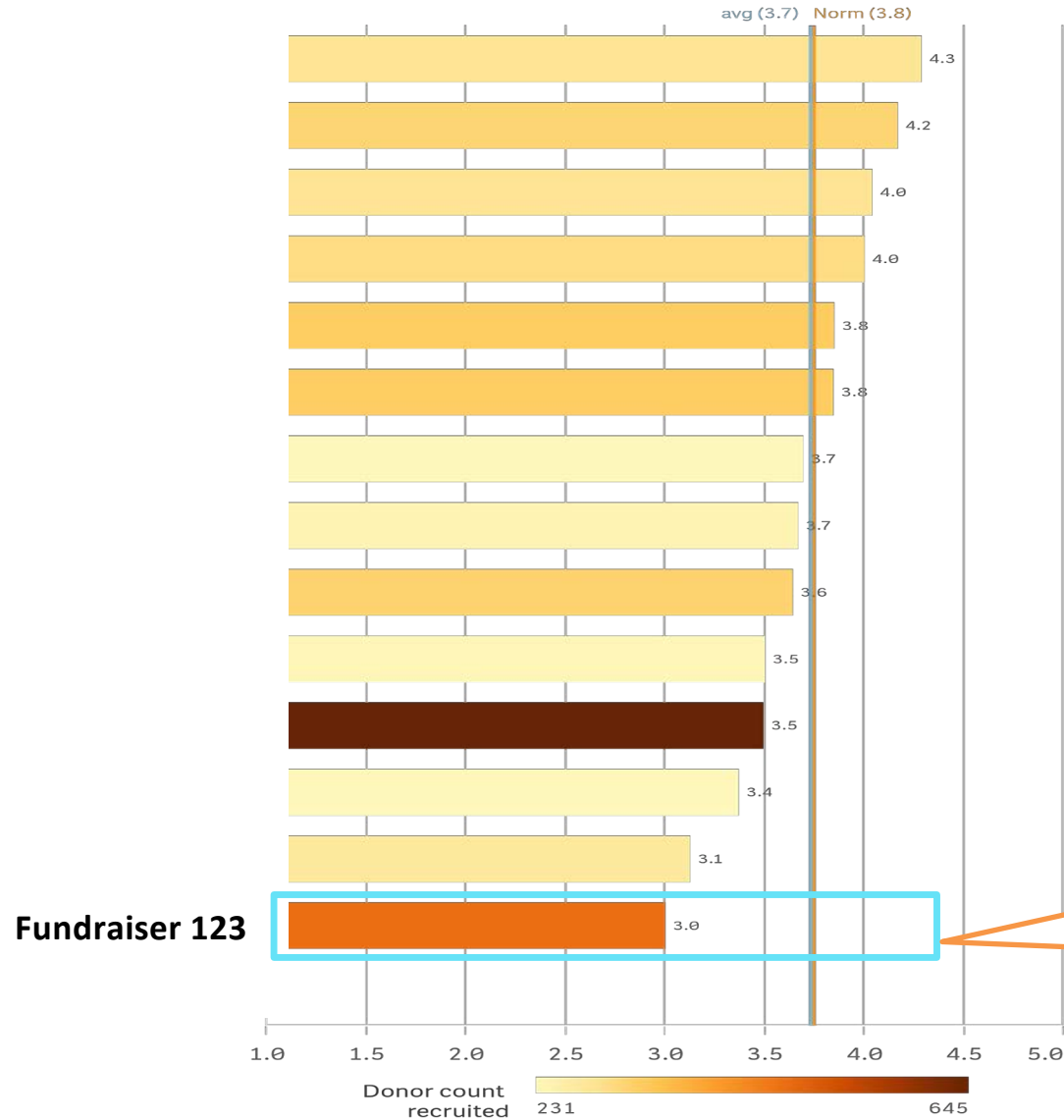
Limited to recruiters who recruited more than 231 donors.



Diagnostic Mode:
Bounces and
Unsubscribes

Intention to stay

Limited to recruiters who recruited more than 231 donors.



Diagnostic Mode: Satisfaction

- Bit corny, stop trying make me feel like your buddy
- Not clear was monthly (2)
- Too slow (2)