# > SUSTAINING DONOR STEWARDSHIP: BRINGING SEXY BACK

PRESENTED BY CHAS OFFUTT & DANIELLE JOHNSON VERMENTON Presented June 17, 2014





# **CHAS OFFUTT**

12+ YEARS OF
NONPROFIT EXPERIENCE
8 YEARS OF LO EXPERIENCE
FREQUENT BLOG
CONTRIBUTOR &
CONFERENCE PRESENTER

www.npengage.com/author/chas-offutt



# DANIELLE JOHNSON VERMENTON

FUNDRAISING GEEK. MOM. INTERACTIVE CONSULTANT. SPEAKER. ALL AROUND BAD ASS! I LOVE WORKING WITH ORGANIZATIONS THAT ARE CHANGING THE WORLD.



# What happens today with your monthly donors?







But...

# What's the goal for the organization's sustained giving program?

# Is there a donor retention goal? What about gift upgrades? First time donor conversions?

# Is there a plan for stewarding, retaining and ultimately increasing gifts?

#### **AGENDA**

Tactics for Recognition & Stewardship

Planning for Gift Upgrades and Upsells

Using Luminate to Accomplish It

**New Resources** 



What's the right mix of donor love?

**Donor Welcome Series** 

Impact email series

Call outs in communications like eNews

**Gift Service Center** 

**Anniversary acknowledgement** 

**Annual Thank You letter and receipt** 

VIP conference call with the Director

#### Donor Welcome Series

Multi-part email campaign

**Target: new monthly donors** 

Set up as a recurring series

#### **Content ideas**

#1: What monthly donors mean to us

#2: Examples of impact

#3: Benefits & communications

**Impact email series** 

Multi-part email campaign

**Target: active monthly donors** 

Content ideas: Mission moments

#### Call outs in eNews

**Utilize ongoing communications** 

Put a graphic or special shout out in the side bar

\*side benefit: promote monthly giving to prospects

Get personalized and set up queries and groups

Target content just to monthly donors

Gift Service Center (GSC)

**Enable donors to have control** 

You can set their level of access

Good if you have several dozen monthly donors

**Creates operational efficiencies** 

**Anniversary acknowledgement** 

**Annual Thank You letter and receipt** 

VIP conference call with the Director

Don't forget offline benefits

Have multiple touch points

Not everyone will opt-in for email or read your emails

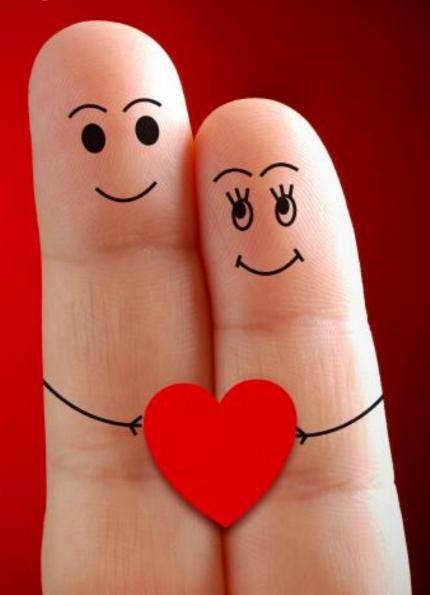
Pull reports in LO for gift start date, then send a handwritten note

Let's revisit this question.

What's the goal for the organization's sustained giving program?

Stewardship Engagement Retention Upgrades

# What do you need to do to increase revenue through upgrades & upsells?



## **Sustainer Program Must-Haves**

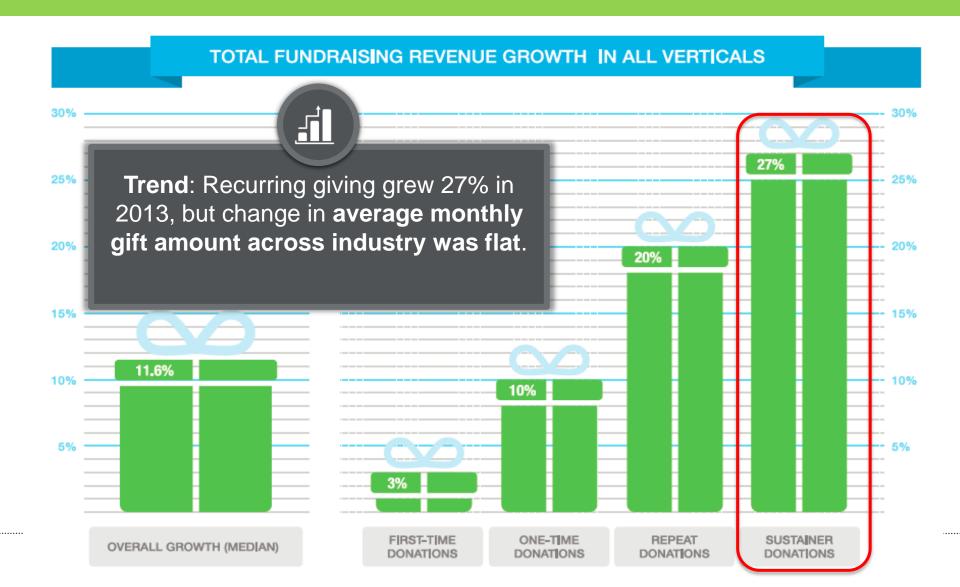
To increase value of sustainers, your organization must –

Establish Value
Differentiate Program
Demonstrate impact

...and of course, ASK them!



## Online Fundraising Key Findings



# **People are Social Animals**



## **Build Value by Creating Movement**













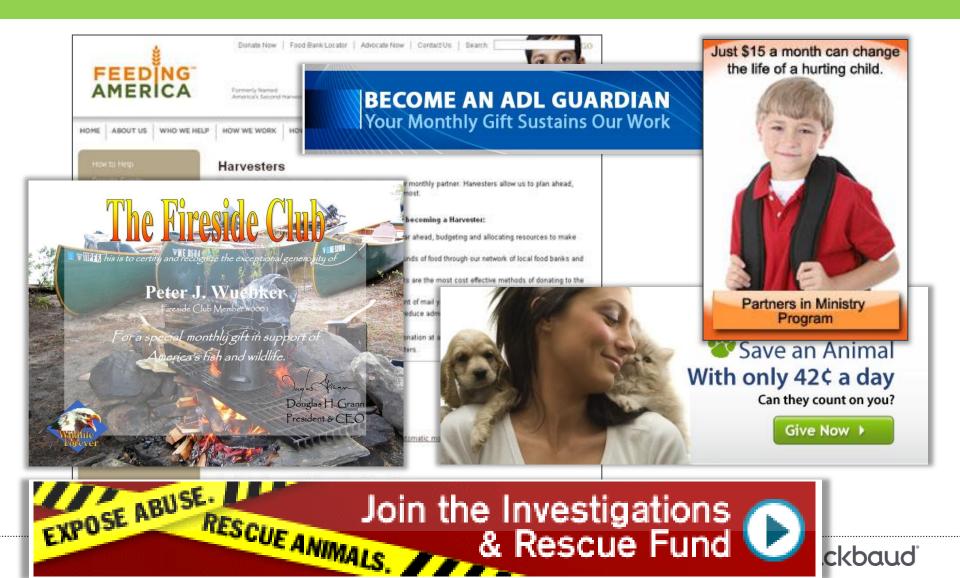


We've reached 51% of our NEW goal of 100,000 si (51.961)





## Give Your Recurring Giving Program a Name





#### Turn Over A New Leaf... Go Paperless Today! Become a monthly member and we pledge never to send you any paper mail... EVER!\* Your Monthly Gift Amount: ○\$50 ○\$25 ○\$20 ○\$16 ●\$12 ○\$8 Choose your donation amount Billing Information \* Name: First Name Last Name \* Street 1: Street 2: \* City/State/ZIP: State V ZIP \* Country: United States \* Email/Phone: Email Phone Start my FREE subscription to WWF's monthly e-newsletter and receive up-to-date news on how WWF is protecting endangered species and their habitats View privacy policy Payment Information Payment Type: Credit Card \* Credit Card Type: (a) VISA \* Credit Card #: \* Expiration Date: 01 ▼ 2013 ▼ I Support WWF with My Donation Your donation supports WWF's global

conservation efforts.

CHRISTIANS UNITED FOR ISRAEL

'For Zion's sake I will not keep silent, for Jerusalem's sake I will not remain quiet, til her righteousness shines out like the dawn, her salvation like a blazing torch.' -Isaiah 62:1

EVENTS ΙFΔRΝ HEADLINES. RREAKING NEWS FACTS SCRIPTURE DONATE TO CUE

#### **Monthly Gift**

Select a Gift Amount:

Submit Donation

to give what you co

AROUT US

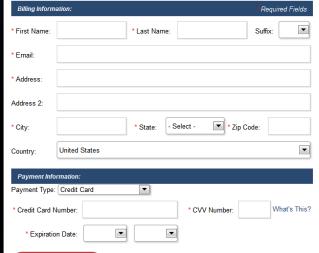
Become a member of CUFI today by making a monthly donation!

#### \$2.09 monthly - Torchbearer \$83.33 monthly - Chairman \$4.17 monthly - Watchman \$416.67 monthly - Solomon's Circle 9 \$12.50 monthly - Star of David \$2,083.33 monthly - Ambassador \$30.41 monthly - Lion of Other Amount: Judah Quarterly Conference Calls with US & Israeli elected

#### Star of David Member Benefits

\$12.50 monthly or \$150 annually gets you

- ➤ Membership Pin
- Personalized Membership Certificate
- ➤ CUFI Car Magnet
- ➤ CUFI Mouse Pad
- Personalized Membership Card
   10% Discount on Registration for All CUFI Events
  - ➤ Subscription to The Torch-CUFI's Quarterly Magazine
  - ➤ Quarterly conference calls with US & Israeli elected officials & experts





#### WE CANNOT REMAIN SILENT. WE MUST NOT KEEP QUIET... ISRAEL NEEDS US MORE THAN EVER!

I will bless those who bless you and whoever curses you I will curse; and all peoples on earth will be blessed through you." Genesis 12:1-3

Israel is facing some of the most serious threats in her history. Therefore, it is imperative that American Christians be equipped to defend Israel in our classrooms, churches and communities. With your support CUFI will be able to educate more Christians about the Biblicial and moral imperative to stand with Isreal. With your support more Christians will be able to stand up and speak up for Israel in her time of need



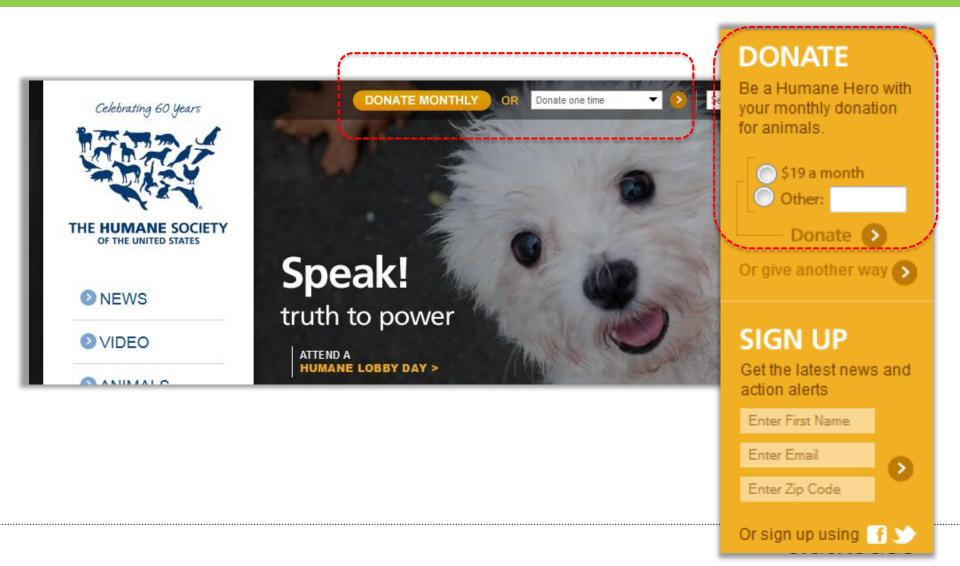
hat is this?

PETA

ed Questions



## Distinguish the Giving Experience



## **Develop a Targeted Communication Plan**



How has your organization established value, differentiated from other giving programs, and demonstrated impact?

# **Acquire Sustainers: Segmentation Plan**

Target Audience	Email Approach	Donation Ask String	Stewardship Communication
Current Donors: MRC \$25 to \$100	Three-part email series with personalization based on previous giving history, honor/memorial geography and/or other known variables.	A/B Test: Pre-set vs. Dynamic (.5x,1x,1.5x,2x)	
Current Donors: MRC \$101 to \$250		A/B Test: Pre-set vs. Write-in only	Sustainers giving at the \$50/month or less level receive regular
Lapsed Donors: MRC \$25 to \$100		Pre-set: \$10,\$25,\$50,\$100,other*	sustainer messaging. Those giving at more than \$50/month receive
Lapsed Donors: MRC \$101 to \$250		Pre-set: \$15,\$25,\$50,\$100,other*	regular messaging + special one-off communications from leadership.
Non-Donors		Pre-set: \$10,\$25,\$50,\$100,other*	
Advocate/Donors		A/B Test: Pre-set vs. Dynamic (.5x,1x,1.5x,2x)	

# **Acquire Sustainers: Donor Upgrade Series**



Our Vision: To rescue thousands, protect millions and prove that justice for the poor is possible.The

Dear System,

Thank you for supporting International Justice Mission. I hope you know how significant your generosity is to us: You are part of a global movement bringing freedom and justice to those who desperately

Around the world, millions are trapped in violence: forced into slavery, sold for sex, jailed without cause or robbed of their homes.

Your generous contribution will truly make a difference in the lives of men, women and children by providing them with rescue and renewed hope for their lives and futures.

On behalf of those whose lives have been transformed by your generosity, thank you.

Gratefully.

The International Justice Mission Team

Every gift has an impact...

\$20 can provide an hour of trauma counseling for survivor of sex trafficking

\$120 can provide three days of critical care - the first step towards recovery for a survivor of violence

\$450 can provide ten days of undercover investigations to find girls trapped in brothels

\$818 can provide training or business start-up costs for two survivors of violence



**Education/org** success



Our Vision: To rescue thousands, protect millions and prove that justice for the poor is possible.™

Dear System

The global movement to seek justice is growing, and we're grateful you have chosen to partner with International Justice Mission. Learn more about how IJM is seeking justice for the poor, and how you can get more involved.

Since 1997, IJM has relieved nearly 16,000 women, children and men from violent oppression. We work in some of the poorest communities across ten countries throughout Africa, Latin America, South Asia and Southeast Asia where children and families experience some of the very worst human rights abuses; from sex trafficking and sexual assault, to modern-day slavery and violent land theft.

Make it possible for IJM to show up, 24 hours a day, when you give \$24 or more PM IN

IJM not only works to rescue and restore survivors of violence, but to restrain the criminals from continuing to hurt others. We work hand-in-hand with local governments to repair broken justice systems so that existing laws actually protect the poor from violence that plagues their communities

Read about some recent highlights below. We're seeing amazing progress—but this is just the beginning. We simply cannot bring freedom and secure justice without

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Action

The International Justice Mission Team



We're helping local law enforcement protect poor people from violence. We recently opened our third office in the Philippines, where we're taking on the bars and clubs that traffic irls and rescuing children from the growing cybersex industry.



Ve help rescue modern-day slaves in India-like these 91 families, all freed in a single operation earlier this year. 273 children, women and men are now free to go to school and work for



Ve want to make sure children who survive sexual violence are fully restored - and we want to stop the

Success stories/ program impact



Our Vision: To rescue thousands, protect millions and prove that justice for the poor is possible.™

Dear System.

I started working with IJM more than a decade ago. My first job here was to lead our work to protect children from rapists and traffickers in in Manila, the Philippines. International Justice Mission was just a few years old then, but our goal was the same as it is today: to seek justice for the poor and bring freedom to the oppressed.

I'll never forget Catherine,\* the first survivor I ever met. She had been abused by a man she once trusted, and my small team was determined to seek justice for Catherine and bring freedom to more girls

Make it possible for IJM to show up, 24 hours a day. when you give \$24 or more a month

PM IN



Today, IJM has 16 field offices in ten countries, and I have the privilege of leading a team of more than 400 investigators, social workers, lawyers and other professionals. We're still seeking justice for girls like Catherine and standing up against trafficking, slavery and other violence. We simply could not do all of this without a group of friends who have joined us along the way: our IJM Freedom Partners.

Freedom Partners give \$24 (or more) a month to make sure we can show up 24 hours a day. I want to invite you to join this group of friends who make the life-or-death work we do in the field possible. We'll send you regular updates and special reports on the impact you are making for individuals and families around the world as a Freedom

More girls like Catherine are waiting for justice, and we don't want them to wait alone. Entire families are waiting for freedom, and we are ready to bring rescue.

IJM Freedom Partners make this daily fight for freedom and justice possible. Will you join us?

Gratefully,



Ask for support/ value-proposition

#### **Acquire Sustainers: Auto-Prospecting**

Triggered appeal to donors who have given multiple gifts over a distinct period of time.

Query built using engagement factors and criteria to target past giving trends and donor status.

Engagement Factor 1 greater than or equal to 2 AND (Status not equal to Current Sustaining Donor OR Status not equal to Postponed Sustaining Donor OR Status not equal to Lapsed Sustaining Donor OR Status not equal to Partially Lapsed Sustaining Donor) AND Last Transaction Date falls on or before 15 day or days prior to today AND System Origin Application Type not equal to Data Sync



Cancer

Canadian Société du cancer

Dear System,

On behalf of everyone at the Canadian Cancer Society in Saskatchewan, I want to thank you for your recent gifts - as well as your ongoing generosity.

Because we know you share our commitment to fighting cancer every day, you're invited to join a special group of donors in our monthly giving program.

#### Our Give Hope for Life monthly giving program is the best way to fight cancer.

Your monthly donation is conveniently withdrawn from your account or charged to your credit card each month. Your donation provides us with a steady, ongoing source of funding, making it easier for us to apply more of your donation directly to support programs, advocacy and prevention work, and life-saving cancer research. And you have the option to manage your monthly commitment through our secure, private, online self-service centre.

Join us and you can Give Hope for Life by:

- · providing emotional and practical support for people living with cancer through services like peer support, volunteer drivers and the Cancer Information Service.
- funding leading-edge research to outsmart cancer
- · empowering cancer patients and their families with reliable health information
- · promoting healthy lifestyle strategies for reducing cancer risk
- influencing public health policy for quality cancer care
- . ensuring more of your donation is directly applied to the Society's life-saving work by reducing administrative costs

#### Yes! I will Give Hope for Life with a monthly gift today

Monthly giving is convenient, predictable and tax-deductible. When you join this special group, you are helping the Society save lives. Remember, 94 cents of every dollar raised in Saskatchewan is spent right here in our province.

Won't you please consider joining us to Give Hope for Life?



Sincerely,

**Executive Director** The Canadian Cancer Society in Saskatchewan

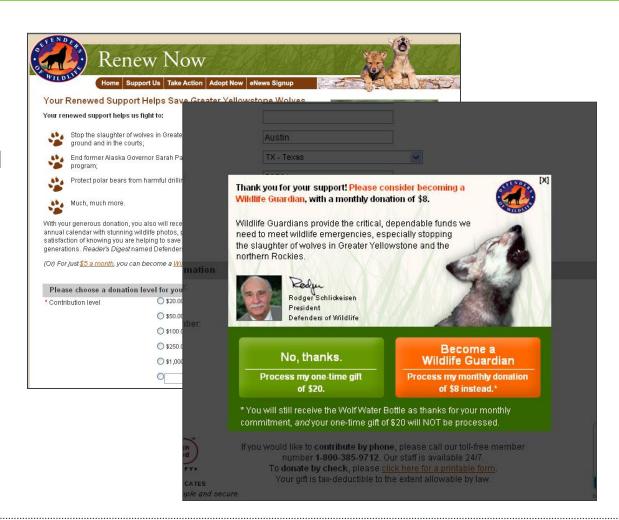


#### **Acquire Sustainers: Single Gift Upsell**

Convert one-time donors to sustaining donors.

Utilized the Donations API to create a one-time gift form that presented an opportunity to convert the gift to a sustaining gift.

Over the 5 months, 10% of one-time donors converted to sustainers.





## **Upgrading Sustainers**



"THE COMPUTER SAYS I NEED TO UPGRADE MY BRAIN TO BE COMPATIBLE WITH ITS NEW SOFTWARE."

#### **Upgrade Sustainers: Make a Plan**

Determine what time of year your annual campaign will occur

Develop a campaign strategy that defines audience, objectives, and tactics

Formalize a segmentation plan

Adopt a "gratitude with an attitude" messaging approach to donors

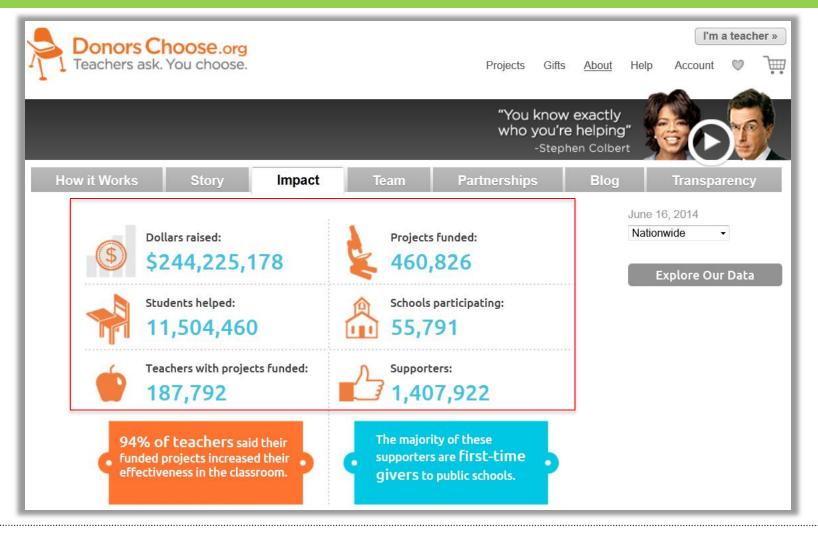
Take all channels into consideration



# **Upgrade Sustainers: Define Your Message**



#### **Upgrade Sustainers: Focus on Outcomes**



# YOU'RE RELENTLESS. YOU'RE A FREEDOM Now you can grow the movement even more. This September all monthly increases will be do 1. Choose your monthly increase—every bit makes a difference. 3. Combine the pow Partners acting to Partners acti



#### THIS SEPTEMBER, FREEDOM PARTNER MONTHLY GIVING INCREASES ARE MATCHED—FOR AN ENTIRE YEAR UP TO \$310,000!

August 20, 2012

Dear ««Salutation»»,

As a Freedom Partner, you know that every day, slave-owners, traffickers and criminals prey on vulnerable children and families. They are relentless.

That's why we're so grateful that every day you choose to be even more relentless.

You know that the criminals won't give up without a fight. You know that vulnerable people are waiting for a defender. And I hope you know just how critical your partnership is to us.

BECAUSE NO ONE SHOUL!

Every single gift of financial support given to IJM makes a difference. But your monthly commitment as a Freedom Partner does even more: It provides funding we know we can count on. It's the security we need to continue our urgent work.

# YES! I want to increase my monthly gift!

Combine the power of other Freedom Partners and transform thousands of more lives!



■ Monthly ■ \$1	10 🔲 \$15	\$6	\$		
● Annual ■ \$1	120 🔲 \$				
l would like to pa	ny by:				
Check (Payable to IJM)	Credit Card	Bank	Draft (E	nclose voided	heck
				-	
					- 1
Card No.			Ex	piration Da	te
	ation:		Ex	piration Da	te
Card No.  My contact informa  Please correct or update your inform			Ex	piration Da	te
My contact informa	ation.		Ex	piration Da	te
My contact informa Please correct or update your inform FirstName Lastf Address	ation. Name		Ex	piration Da	te
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PO Box 58147, Washington, DC, 20037 • 703.465.5495

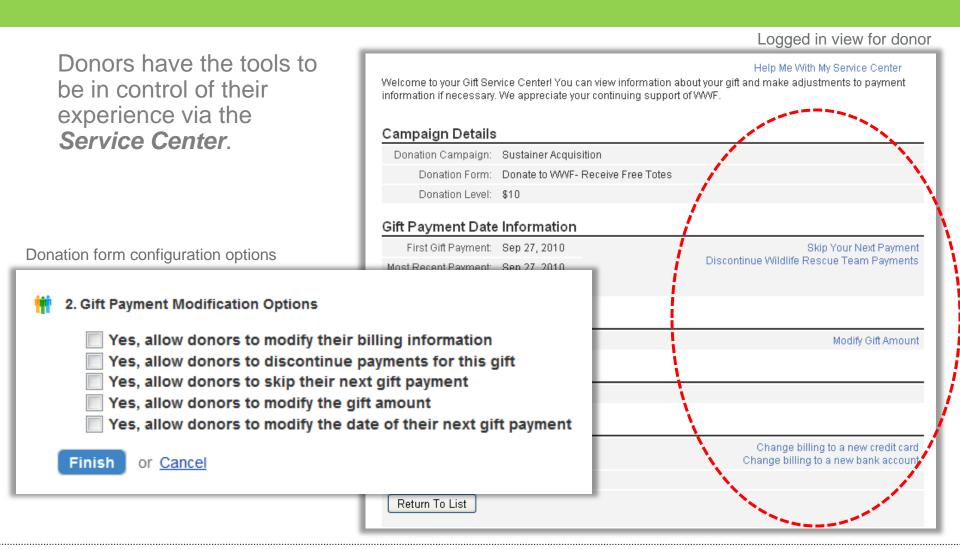
IJM.org/FreedomPartner

Thanks to a supporter in Seattle and other ge year if you give in September, up to \$225,000

What can you give up a

blackbaud

## **Upgrade Sustainers: Gift Service Center**



37

#### **Upgrade Sustainers: Donation API**

Select \$182.00 monthly - Sustainer Campaign 2012 Gift: My current monthly donation amount is \$182.00 I would like to increase my monthly donation by: **\$19.00** \$37.00 **\$55.00** Enter amount Other SUBMIT

# **New Kit! Sustainer Stewardship Series**



#### Thank you!

Dear Kent.

We just wanted to say thank you: support of [Organization Name]. \ gift you help us [organization's mi support, [Organization Name] is a

- Bullet point 1
- . Bullet point 2 . Bullet point 3

As a monthly donor to [Organizati growing group of sustaining supp of automated online monthly givin

We hope that you are staying con social media. You can follow us ( always be up to date on our news friends and family to do the same

We look forward to sharing valual you about how your monthly supp [How you're changing the world]. [Organization Name] and those w our work

Warmest regards.



ISIGNATUR [NAME] [TITLE] Organizatio

1234 Main Street Somewhere, TX 55555 [Organization Name] @ 2014 All rights res



#### Thank you for x months

Everyone here at [Organization Name] would like to thank you for your past X months of generous support! Since committing to be a monthly support of our mission to [Org Mission] we have done some amazing work to impact [Mission's Impact). And we couldn't have done it without your help. To be more specific, your support enabled us to

- Bullet point 1
- Bullet point 2
- **Bullet point 3**

As a monthly donor to [Organization Name], you ar generous group of sustaining supporters, but have about what just \$5 more dollars per month could do of a single combo meal or a large cup of joe each i

- Bullet point 1
- Bullet point 2
- Bullet point 3

We know that every dollar counts for every family s only ask for a small increase in your monthly gift. If to update your already generous monthly gift, we've for you to change this in our online Gift Service Ce enter a new amount and even update your paymer current billing card is about to expire.

Again from all of us here at [Organization Name] as help, thank you for supporting our work.

Warmest regards,



SIGNATURE IMAGE] MITLE

1234 Main Street Somewhere, TX 55555 | Tel: XXX.XXX.XXX [Organization Name] @ 2014 All rights reserved.

Unsubscribe | Donate | Forwa

POWERED F

black

View this message on our website



View this messa

FOLLOW US: 9



#### Thank you for x months of generous support!



#### Your Text Here

Everyone here at [Organization Name] would like to thank you for your past X months of generous support! Since committing to be a monthly support of our mission to [Org Mission] we have done some amazing work to impact [Mission's Impact]. And we couldn't have done it without your help. To be more specific, your support

- Bullet point 1 Bullet point 2
- Bullet point 3

As a monthly donor to [Organization Name], you are part of a generous group of sustaining supporters, but have you thought about what just \$5 more dollars per month could do? For the cost of a single combo meal or a large cup of joe each month, you

- Bullet point 1
- Bullet point 2 Bullet point 3

#### Your Gift Information:

Monthly Amount: \$10.00

Card Exp. Date: Dec 31, 2014

#### Manage Your Gift:

We make it easy for you to manage your monthly gift in our Gift Service Center. Use the SC to do things like update our card information or increase your monthly gift amount easily and securely

Manage your monthly gift

We know that every dollar counts for every family so that's why we only ask for a small increase in your monthly gift. If you would like to update your already generous monthly gift, we've made it easy for you to change this in our online Gift Service Center. You can enter a new amount and even update your payment info if your current billing card is about to expire

Again from all of us here at [Organization Name] and those we help, thank you for supporting our work.



SIGNATURE IMAGE] Organization Namel

1234 Main Street Somewhere, TX 55555 | Tel: XXX.XXX.XXXX [Organization Name] @ 2014 All rights reserved

Unsubscribe | Donate | Forward to a friend | Visit our website



#### What's included?

New email templates, this is just a sample

html code with directions for putting into Luminate

Step by step guide for building queries

# **BRINGING SEXY BACK**



#### ➤ THANK YOU FOR ATTENDING!

Links to the slides, webinar recording and resource page will be sent to everyone that registered for today's webinar either late this afternoon or tomorrow morning.

Be sure to search "June webinar" in the Community to post any questions you may have about today's topic.

Be sure to visit our Community Webinar page at customer.convio.com/webinars to watch past webinars or register for upcoming ones

We also want to promote our bonus webinars this week!

