

Understanding and Applying Benchmarks for Sustainer Programs

DMAW Sustainer Day

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Presenters



Richard Geiger

SVP, Strategy and
Innovation
Data Axle Nonprofit



Kristina Williams

Kristina Williams
Managing Director,
Membership Acquisition
Sierra Club

Topics

Level Set – Sustainer Defined



Why Benchmark



Just the Facts



Case Study: Sierra Club



Call to Action



Sustainer Defined

A sustainer is a donor who commits to a giving plan

- ❑ Have I under asked in exchange for a predictive revenue stream?
- ❑ Can sustainer giving be established as the standard?
- ❑ C4 to C3 – any correlation to affluence/income?
- ❑ How do I link sustainers/sustainer activities throughout other strategies – what kind of programs do they feed?

Questions

- ❑ Differences in acquisition, conversion, and stewardship then standard engagement
- ❑ Not on accident, but is purposeful

Why Benchmark?

Bridgespan Definition

- Benchmarking is a tool nonprofits use to determine how well their organization is performing relative to external peers or to other sites in their network.
- The goal is to identify best practices and opportunities, and subsequently to adapt to improve.

For Consideration

- Start the benchmarking process **within your own organization**, to create the baseline metric of where you are.
- Consider outside Benchmarks carefully
 - Not all programs are the same, orgs serve different missions, spend, integration, etc.

Just the Facts

Benchmarking Donor Behavior not Nonprofit Sustainer Program Behavior

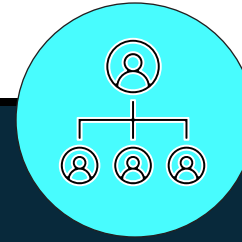
Source: Data Axle Cooperative



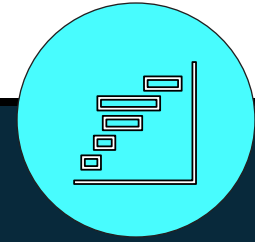
100M+ Donors



**2B+ Giving
Transactions**



**1000+
Contributing
Orgs**



**AI Trained
Sustainer
Models**

Just the Facts ... Giving Behavior

Indicator/Behavior	Likely Sustainers	Likely Major Givers	Likely Mid-Level Givers	Likely Planned Givers	Likely DAF	Likely Web Donors
12M Number of Gifts	15	3	4	13	6	5
12M Recency (Days Since Last Gift)	80	217	240	118	193	185
12M Average Gift	\$32	\$221	\$99	\$44	\$181	\$57
12M Number of Orgs Given To	2	2	2	5	3	2
12M Total Given	\$466	\$503	\$289	\$477	\$678	\$212

Just the Facts... Personas

	Likely Sustainers	Likely Major Givers	Likely Mid-Level Givers	Likely Planned Givers	Likely DAF	Likely Web Donors
Upper Crust (SuperCluster 1) - HH w/ Significant Income > \$350k	6%	20%	30%	5%	24%	10%
High Fidelity (SuperCluster 2) - HH w/ incomes from \$169k - \$220k	9%	17%	19%	6%	20%	14%
Net Worth & Networks (SuperCluster 3) - HH w/ incomes from \$137k - \$144k	20%	23%	22%	19%	29%	22%
Picket Fences (SuperCluster 4) - HH w/ incomes from \$85k - \$119k	12%	10%	9%	8%	10%	13%
Maintaining a Balance (SuperCluster 5) - HH w/ incomes from \$56k - \$74k	18%	10%	7%	20%	7%	15%
Ways & Means (SuperCluster 6) - HH w/ incomes from \$41k - \$53k	12%	9%	5%	20%	7%	8%
Golden Years (SuperCluster 7) - HH w/ incomes from \$29k - \$38k	14%	7%	5%	17%	4%	8%
Debt Builders (SuperCluster 8) - HH w/ incomes from \$22k - \$29k	8%	4%	3%	5%	0%	7%
Hardscrabblers (SuperCluster 9) - HH w/ incomes from \$12k - \$20k	2%	1%	0%	1%	0%	2%

Just the Facts... Demographics

	Likely Sustainers	Likely Major Givers	Likely Mid-Level Givers	Likely Planned Givers	Likely DAF	Likely Web Donors
Age	58.7	60.4	57.8	75.1	63.7	49.5
18-24	1%	0%	1%	0%	0%	2%
25-34	5%	3%	4%	0%	1%	10%
35-44	11%	9%	10%	1%	7%	20%
45-49	5%	6%	6%	1%	5%	9%
50-54	7%	7%	8%	1%	7%	10%
55-59	8%	9%	10%	2%	9%	9%
60-64	11%	12%	12%	5%	12%	10%
65-69	13%	13%	13%	9%	14%	10%
70-74	14%	14%	14%	16%	16%	9%
75+	25%	27%	22%	64%	29%	11%
Home Value	\$407	\$830	\$955	\$369	\$952	\$469
Income	\$115,614	\$188,700	\$228,602	\$101,815	\$215,649	\$143,246
Heavy Internet User- Purchasers	5.8	4.8	4.0	7.5	4.7	4.4
Length of Residence	18.6	18.8	17.7	27.4	21.5	14.7
# of Tradelines	0.4	0.3	0.3	0.6	0.4	0.3
# of Adults	2.8	3.1	3.0	3.1	3.3	2.7
# of Children	0.5	0.5	0.5	0.3	0.6	0.7
Female	61%	43%	48%	48%	43%	60%
Married	62%	76%	74%	67%	84%	67%
Mortgage Present	35%	38%	39%	28%	42%	36%
Email Present	23%	20%	20%	21%	21%	24%
Republican Party	21%	27%	21%	31%	30%	18%
Democratic Party	36%	31%	38%	33%	35%	35%
Home Owner	84%	90%	90%	87%	99%	85%

Case Study: Sierra Club

The background of the slide is a dark gray or black. It features a subtle, repeating pattern of thin, light gray lines forming a grid of diamond shapes. Scattered across this background are numerous small, semi-transparent dots in various colors, including yellow, cyan, blue, and orange. Some of these dots are connected by thin lines of the same color, creating a sparse, network-like structure. The overall aesthetic is modern and minimalist.

DonorCentrics

- Compiled by Blackbaud
- Another option for benchmarking
- 20 orgs with large sustainer programs
- Across sectors and giving types
- Provides detailed data breakdowns
- Opportunity for discussion with others

Wilderness Guardians

Wilderness Guardians Overview

Wilderness Guardians is Sierra Club's monthly donor program

- Currently we have about 90,000 monthly donors
- We saw a huge amount of growth in 2017
- While we were able to maintain that growth over a number of years, we started to see our channels dip in effectiveness in 2021
- In order to get back to a growth trajectory, we needed to find and invest in new channels and ways to reach donors

Connected TV



Connected TV/ OTT

Connected TV is internet-connected devices that allows users to stream live or on demand programming.

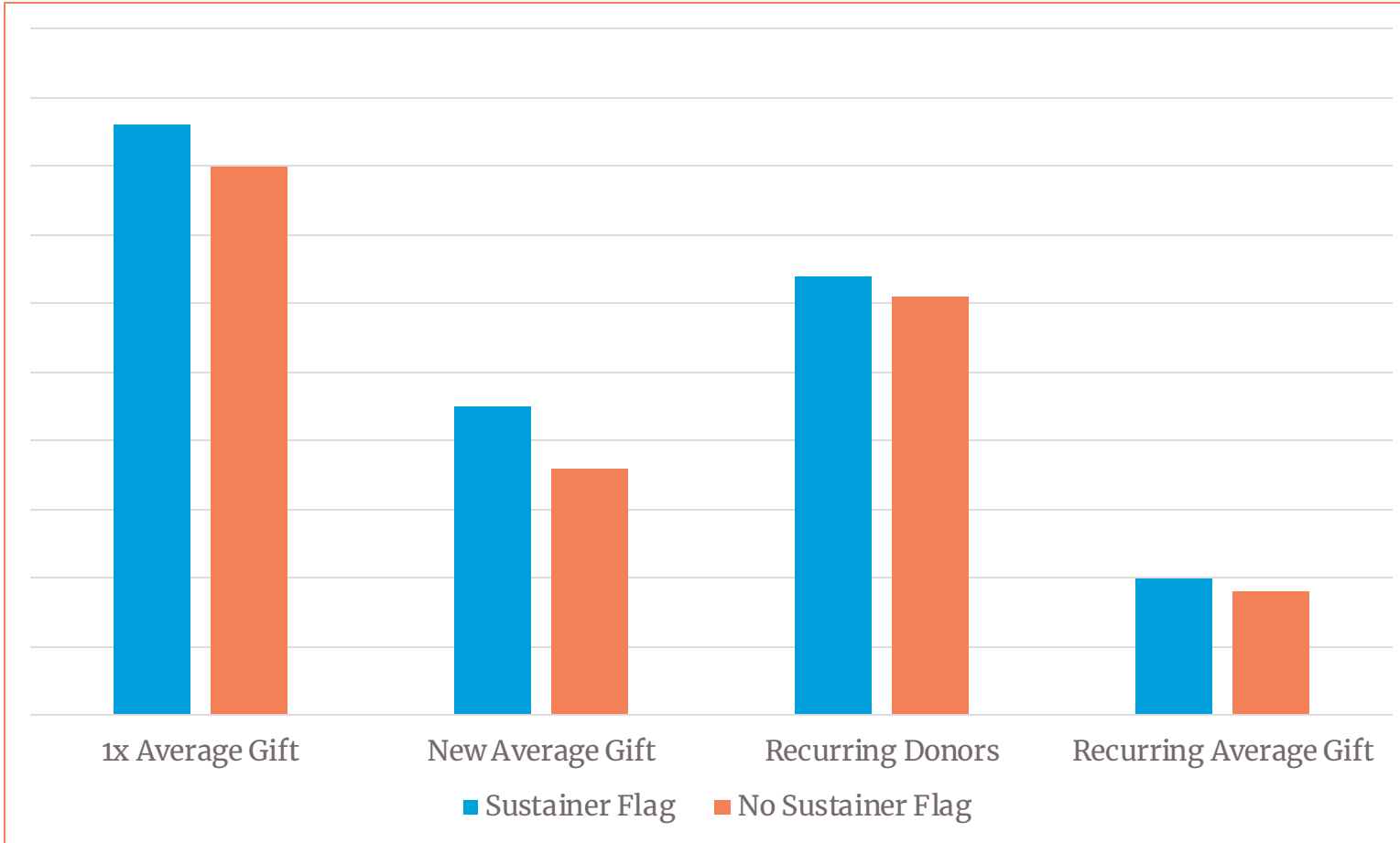


Audience Selection

- Used a Digital Model based on Sierra Club's 0-24 month online donors
- Added the sustainer indicator flag to 50% of the records
- Wanted to see how those with the sustainer indicator performed

Model	Selection
Sierra Club Digital Model - with Sustainer Flag	1,000,000
Sierra Club Digital Model - No Sustainer Flag	1,000,000

Results



Key takeaways:

- Sustainer flag resulted in higher metrics across the board
- Modest increase in number of Recurring Donors (5%) and Recurring Average Gift (11%)
- Modest increase in 1x Avg Gift (7.5%)

Follow up Testing



SIERRA CLUB

NEW MEMBER ACTIVATION FORM

Member Name: _____ Annual Dues: ~~_____~~ **\$15** Member Number: _____ Respond By: _____

☒ **YES, you can count on me to help protect America's wildlife and wildlands. Enclosed is my contribution to join Sierra Club in the amount of:**

☒ **\$15 Special Introductory Offer** ☐ \$25 ☐ \$35 ☐ \$50 ☐ \$100 ☐ Other \$ _____ See reverse for payment options. ▶

☒ **YES, I have considered joining other Wilderness Guardians with a recurring gift to Sierra Club.** ☐ Make it monthly! ☐ No, donate once.

☐ I have enclosed a membership contribution of \$15 or more. Please send the gift I selected using my FREE GIFT CHOICE sticker:

☐ Exploration Daypack (p365) ☐ First Aid Kit (p249) ☐ Cooler (p363)

☐ Please do NOT send me any free gifts. I'd like Sierra Club to use my entire gift to help protect the environment.

When you join, please consider a gift of \$35 or more!

FREE GIFT CHOICE
AFFIX
YOUR
FREE GIFT
CHOICE
STICKER
HERE

- Due to the results of the CTV test we decided to test adding the Sustainer Indicator Flag to an upcoming Acquisition Direct Mail Test
- Control form did not have a sustainer ask, so we added it to the form for the test

Early Indications

Campaign	Package Description	Mailed	Gift	Members	RespRate	Revenue	AvgGift
M24L...E	H2-MT10 - Van Flora NC Ctrl - Pr 3 Ch - Ctrl RF to Cont Lst	69,348	418	403	0.60%	\$11,423	\$27.33
M24L...F	H2-MT11 - Van Flora NC Tst - Pr 3 Ch - Ctrl RF to Sust Lst	74,542	293	285	0.39%	\$7,600	\$25.94
M24L...G	H2-MT12 - Van Flora NC Tst - Pr 3 Ch - Sust RF to Sust Lst	74,543	270	252	0.36%	\$11,447	\$42.40

- Depressed Response Rate
- Increased Average Gift
- Too early to say, but it looks like CTV results of higher value may hold

Wrapping it Up



Data and Benchmarks are the place to start but are never the whole story about how your organization engages.



Call to Action – Understand your potential

- What is the sustainer potential on your file?
- What will it take to unlock that potential?
- Acquisition vs. Conversion
Vs. Channel



Resources

- Data Providers
- Benchmarking Groups – donorCentrics
- The Nonprofit Alliance – Sustainer Best Practices White Paper

THANK YOU

