



EPSILON™

# Speed to Second Gift

The metric that will make your retention SOAR!



# Today's presenters



**Nosa Adetiba**

Director, Member Acquisition  
ASPCA



**Marne Lopez**

Account Director  
Epsilon



**Valerie Vierengel**

Account Director  
K2D Strategies

# Agenda

Introductions

Why are we here?

Epsilon Subsequent Giving Analysis for ASPCA

ASPCA Case Study

What you can do to improve retention NOW





## Why are we here?

### Retention is a persistent problem

**27%** First year  
offline-only  
retention

**24%** First year  
online-only  
retention

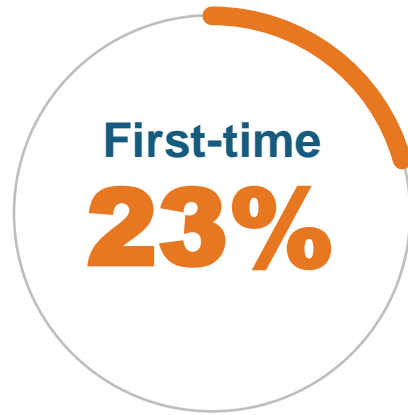
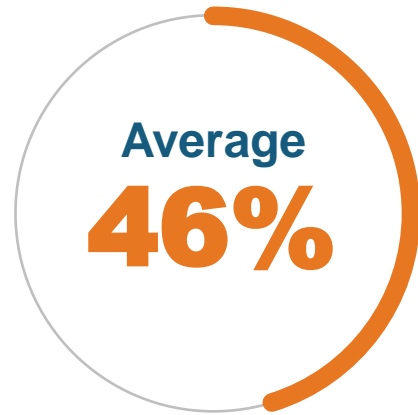
**A shrinking donor pool, changes to the tax code,  
and economic instability all make for a bleak fundraising outlook.**



**How can we solve  
what feels like an  
unsolvable problem?**

## Why are we here?

# Just how important is that second gift?



**“It’s the largest factor affecting donor retention.”**

Jaye Love, co-Founder at Bloomerang

# Speed to second gift

## Just how important is that second gift?



# Subsequent giving analysis

## Subsequent gifts by List Source

### First 60 Days

mailed 09/27/2019 Initial Response Range: 09/27/2019-11/27/2019

Source	Mailed	Donors	Revenue	RR	RR Index	\$/PC	\$/PC Index	AOG	AOG Index	% Circ
Model	1,294,523	7,096	\$201,507	0.55%	107	\$0.16	109	\$28.40	102	69.62%
Multis	60,537	181	\$4,581	0.30%	58	\$0.08	53	\$25.31	91	3.26%
OSL	120,468	458	\$16,237	0.38%	74	\$0.13	95	\$35.45	128	6.48%
OSL - Animal	167,593	861	\$21,881	0.51%	100	\$0.13	92	\$25.41	91	9.01%
OSL - NFP	216,317	940	\$20,922	0.43%	85	\$0.10	68	\$22.26	80	11.63%
<b>Total</b>	<b>1,859,438</b>	<b>9,536</b>	<b>\$265,128</b>	<b>0.51%</b>	<b>100</b>	<b>\$0.14</b>	<b>100</b>	<b>\$27.80</b>	<b>100</b>	<b>100%</b>

### Next 12 Months

mailed 09/27/2019 Subsequent Response Range: 11/28/2019-11/21/2020

Source	Summary								
	Total Subseq Trans	Total Subseq Resp	Total Subseq Revenue	Repeat Donation Rate	Repeat Donor Rate	Gross Subseq Revenue per new Donor	Gross Subseq Revenue per repeat Donor	AOG per Subsequent Transaction	
Model	5,264	2,807	\$195,606	74.18%	39.56%	\$27.57	\$69.69	\$37.16	▲ 31%
Multis	123	64	\$3,234	67.96%	35.36%	\$17.87	\$50.53	\$26.29	▬ 4%
OSL	369	193	\$14,252	80.57%	42.14%	\$31.12	\$73.84	\$38.62	▬ 9%
OSL - Animal	680	361	\$22,140	78.98%	41.93%	\$25.71	\$61.33	\$32.56	▲ 28%
OSL - NFP	849	409	\$25,008	90.32%	43.51%	\$26.60	\$61.14	\$29.46	▲ 32%
<b>Campaign Total</b>	<b>7,285</b>	<b>3,834</b>	<b>\$260,240</b>	<b>76.39%</b>	<b>40.21%</b>	<b>\$27.29</b>	<b>\$67.88</b>	<b>\$35.72</b>	▲ 28%

### INITIAL CAMPAIGN:

- \$265K in Donations
- Highest Avg Gift \$-OSL
- Highest RR-Coop Models

### NEXT 12 MONTHS:

- \$260K in Subsequent Gifts
- 40.2% Repeat Donor Rate
- 28% Lift in Average Gift \$
- Highest Repeat Donor Rate
  - Outside Lists-Not for Profit
- Highest Increase in Avg Gift \$
  - Outside Lists-Not for Profit
  - Modeled Universes



# Subsequent giving analysis

## Subsequent gift review by Recency and Dollar Amount

### First 60 Days

Initial Gift Amount	Donors	Revenue	AOG	AOG Index	% of Donors
\$1-\$9	779	\$3,275	\$4.20	15	8%
\$10-\$14	1,813	\$18,828	\$10.38	38	19%
\$15-\$19	625	\$9,453	\$15.12	55	7%
\$20-\$24	3,124	\$63,445	\$20.31	73	33%
\$25+	3,234	\$170,127	\$52.61	190	34%
<b>Campaign Total</b>	<b>9,575</b>	<b>\$265,128</b>	<b>\$27.69</b>	<b>100</b>	<b>100</b>

### Next 12 Months

Initial Gift Amount	Donors	Total Subseq Trans	Total Subseq Resp	Total Subseq Revenue	Repeat Donor Rate	Repeat Donor Rate	Gross Subseq Revenue per new Donor	Gross Subseq Revenue per repeat Donor	AOG per Subsequent Transaction	
\$1-\$9	779	544	263	\$3,776	69.83%	33.76%	\$4.85	\$14.36	\$6.94	▲ 65%
\$10-\$14	1,813	1,179	606	\$19,746	65.03%	33.43%	\$10.89	\$32.58	\$16.75	▲ 61%
\$15-\$19	625	427	217	\$9,937	68.32%	34.72%	\$15.90	\$45.79	\$23.27	▲ 54%
\$20-\$24	3,124	2,704	1,409	\$77,448	86.56%	45.10%	\$24.79	\$54.97	\$28.64	▲ 41%
\$25+	3,234	2,502	1,368	\$151,087	77.37%	42.30%	\$46.72	\$110.44	\$60.39	▲ 15%
<b>Campaign Total</b>	<b>9,575</b>	<b>7,356</b>	<b>3,863</b>	<b>\$261,994</b>	<b>76.83%</b>	<b>40.34%</b>	<b>\$27.36</b>	<b>\$67.82</b>	<b>\$35.62</b>	▲ 29%

### FINDINGS:

- Months 1-2-Little repeat revenue
- Months 3-4-Repeat donation rates increase
- Peak of Repeat \$ in Months 5 and 6
- \$1-9 Initial Gift Band-gift does not increase over time

### RECOMMENDATIONS:

- Consider Mktg \$ Spend for Lower \$ Donor Bands
- Focus on \$15+ Gifts for LTV

# Subsequent giving analysis

## Compare to Abacus Personas – Creating a new donor journey

### First 60 Days

mailed 09/27/2019 Initial Response Range: 09/27/2019-11/27/2019

Abacus Persona	Mailed	Donors	Revenue	RR	RR Index	\$/PC	\$/PC Index	AOG	AOG Index	% Circ
P2_Fresh_Philanthropists	59,406	376	\$11,429	0.63%	113	\$0.192	125	\$30.40	111	3.53%
P3_New_Kids_on_the_Block	203,068	1,912	\$59,445	0.94%	168	\$0.293	191	\$31.09	114	12.07%
P4_Future_Fans	13,217	2	\$25	0.02%	3	\$0.002	1	\$12.50	46	0.79%
P5_Just_Not_My_Scene	38,282	3	\$1,062	0.01%	1	\$0.028	18	\$354.00	1,293	2.27%
P6_Downshifting_and_Downsizing	65,628	8	\$329	0.01%	2	\$0.005	3	\$41.13	150	3.90%
P7_Holiday_Heroes	89,373	455	\$18,932	0.51%	91	\$0.212	138	\$41.61	152	5.31%
P8_III_Stand_By_You	402,053	1,263	\$34,793	0.31%	56	\$0.087	56	\$27.55	101	23.89%
P9_Boundlessly_Bighearted	219,558	1,114	\$53,053	0.51%	90	\$0.242	157	\$47.62	174	13.04%
P10_Careers_Kids_and_Kindness	128,329	1,062	\$20,885	0.83%	147	\$0.163	106	\$19.67	72	7.62%
P11_Frugal_and_Frequent	464,189	3,251	\$58,660	0.70%	125	\$0.126	82	\$18.04	66	27.58%
<b>Campaign Total</b>	<b>1,683,103</b>	<b>9,446</b>	<b>\$258,613</b>	<b>0.56%</b>	<b>100</b>	<b>\$0.154</b>	<b>100</b>	<b>\$27.38</b>	<b>100</b>	<b>100%</b>

### INITIAL CAMPAIGN FINDINGS:

- Highest Initial Response
  - New Kids on the Block
  - Careers, Kids and Kindness
  - Frugal & Frequent
  - Fresh Philanthropists
- Strongest Avg \$
  - Boundlessly Bighearted
  - Holiday Heroes

### Next 12 Months

mailed 09/27/2019 Subsequent Response Range: 11/28/2019-11/21/2020

Abacus Persona	Mailed	Donors	Summary								
			Total Subseq Trans	Total Subseq Resp	Total Subseq Revenue	Repeat Donor Rate	Repeat Donor Rate	Gross Subseq Revenue per new Donor	Gross Subseq Revenue per repeat Donor	AOG per Transaction	
P2_Fresh_Philanthropists	59,406	376	227	121	\$8,969	60.37%	32.18%	\$23.85	\$74.12	\$39.51	▲ 30%
P3_New_Kids_on_the_Block	203,068	1,912	1,641	827	\$66,212	85.83%	43.25%	\$34.63	\$80.06	\$40.35	▲ 30%
P4_Future_Fans	13,217	2	4	1	\$353	200.00%	50.00%	\$176.50	\$353.00	\$88.25	▲ 606%
P5_Just_Not_My_Scene	38,282	3	0	0	\$0	0.00%	0.00%	\$0.00	\$0.00	\$0.00	▼ -100%
P6_Downshifting_and_Downsizing	65,628	8	13	4	\$633	162.50%	50.00%	\$79.13	\$158.25	\$48.69	▲ 18%
P7_Holiday_Heroes	89,373	455	176	124	\$8,157	38.68%	27.25%	\$17.93	\$65.78	\$46.35	▲ 11%
P8_III_Stand_By_You	402,053	1,263	927	468	\$33,575	73.40%	37.05%	\$26.58	\$71.74	\$36.22	▲ 31%
P9_Boundlessly_Bighearted	219,558	1,114	864	478	\$55,044	77.56%	42.91%	\$49.41	\$115.15	\$63.71	▲ 34%
P10_Careers_Kids_and_Kindness	128,329	1,062	891	463	\$22,979	83.90%	43.60%	\$21.64	\$49.63	\$25.79	▲ 31%
P11_Frugal_and_Frequent	464,189	3,251	2,455	1,315	\$59,314	75.52%	40.45%	\$18.24	\$45.11	\$24.16	▲ 34%
<b>Campaign Total</b>	<b>1,859,438</b>	<b>9,536</b>	<b>7,285</b>	<b>3,834</b>	<b>\$260,240</b>	<b>76.39%</b>	<b>40.21%</b>	<b>\$27.29</b>	<b>\$67.88</b>	<b>\$35.72</b>	▲ 28%

### APPLICATION:

- Potential Sustainers Program
  - Frugal and Frequent
- Suppression Opportunity
  - Just Not My Scene
  - Downshifting and Downsizing
  - Holiday Heroes (Jan-Sep)
- Donor Upgrade for Higher Gift
  - Boundlessly Bighearted

# ASPCA welcome track

## ASPCA

- Acknowledgement
- New Donor Package
  - Testing decal v. member card

A template for an ASPCA testing decal. It has an orange header with the ASPCA logo. Below the header, it says "IMPORTANT NOTICE: PLEASE HELP MY PETS" in red. Underneath, there is a line of text: "I have pets in my home waiting for me. If for any reason I am unable to return home to care for my pets, please notify the following:". Below this are two sets of horizontal lines for "NAME" and "TELEPHONE". At the bottom, there is an orange footer with the tagline "WE ARE THEIR VOICE.".

I helped save animals' lives today.



# Donor-centric Letter in New Donor Package

Donor-centric language that  
underscores the role of the donor  
in your partnership



424 East 92nd Street, New York, NY 10128 • TEL: (800) 626-0026 • [aspca.org](http://aspca.org)

Matt Bershadker  
President & CEO

Dear <First Name>,

I'm writing today to extend my sincere thanks to you for joining the ASPCA®. I am so grateful to have a friend like you on our side in the fight against animal cruelty.

You are an extraordinary animal lover who refuses to stand by idly while animals in our nation are suffering. And together, we're reaching them.

That's because you have the power to change lives. With your gift to the ASPCA, you rewrite an animal's story—so they can go from a lifetime of abuse to a life filled with love. Animals like Artichoke, whose story you'll find on the back of this letter, are experiencing happiness, safety and comfort because friends like you gave from the heart.

You make happy endings possible. Together, we can rescue animals in danger, rehabilitate fearful dogs, provide urgent care for kittens, help horses find loving homes, and so much more. We fight for stronger legislation to protect animals and respond to emergency situations throughout the U.S. so that we can make our country a safer place for all animals in need.

Today, you have the power to save another life. **You can extend your reach further with a generous gift today that can help an animal in desperate need.** Please consider giving from the heart today. As a new member of the ASPCA, you've joined an organization with over 150 years of experience saving animals—know that your support is going where it's needed most. Thank you.

Sincerely,

A handwritten signature in blue ink that reads "M. Bershadker".

Matt Bershadker  
ASPCA® President & CEO

P.S. I've enclosed a personalized Membership card just for **you**. Please fill out the important information on the back and keep it with you. I am happy to welcome you to the ASPCA. Thank you so much for joining our fight against animal cruelty and for your generous gift today.

**Make Pet Adoption Your First Option® and urge all those you know to do the same.**




# What can we learn from F2F?

## ASPCA F2F Touchpoints

Signup Day	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7
Welcome Brochure	Thank You Call		Guardian Statement				
Bracelet		Acknowledgement Letter		Cultivation Letter			
Decal							
Thank You Text							
Thank You Email							
		General Qualifying House Mailplans and Callplans					

# Convert to monthly



**ASPCA**  
WE ARE THEIR VOICE®

MEMBER

Member Name  
Member ID#: XXXXXXXXXX

**ASPCA** aspc.org  
THE AMERICAN SOCIETY FOR THE PREVENTION OF CRUELTY TO ANIMALS®

**HERE IS YOUR ASPCA® MEMBERSHIP CARD!**

DIRECTRESPONSE\_SAL  
COMPANY  
ADDRESS1  
ADDRESS2  
ADDRESS3  
CITY, STATE ZIP

XXXXXXXXXX X XXXXXXXXXXXXXXXX

---

**With your support, we can help even more animals.**

WITH A GIFT OF: THE ASPCA CAN PROVIDE:

\$40	Food for 10 dogs for about a week.
\$60	One equine medical exam.
\$100	Rescue for animals in an emergency.

YES! I want to help the ASPCA stop cruelty and save the lives of more helpless animals.

\$HPC  \$HPCx1.5  \$HPCx2  Other \$ \_\_\_\_\_

**Check here to make this a recurring monthly gift.** (xxxxxx)

To make your gift online, please visit [helpaspca.org](http://helpaspca.org)

DIRECTRESPONSE\_SAL  
COMPANY  
ADDRESS1  
ADDRESS2  
ADDRESS3  
CITY, STATE ZIP

XXXXXXXXXX X XXXXXXXXXXXXXXXX

Please provide your phone number:  
(XXX) \_\_\_\_ - \_\_\_\_\_

## Conversion

# 460%

Increase in monthly sign ups

## Use real estate wisely

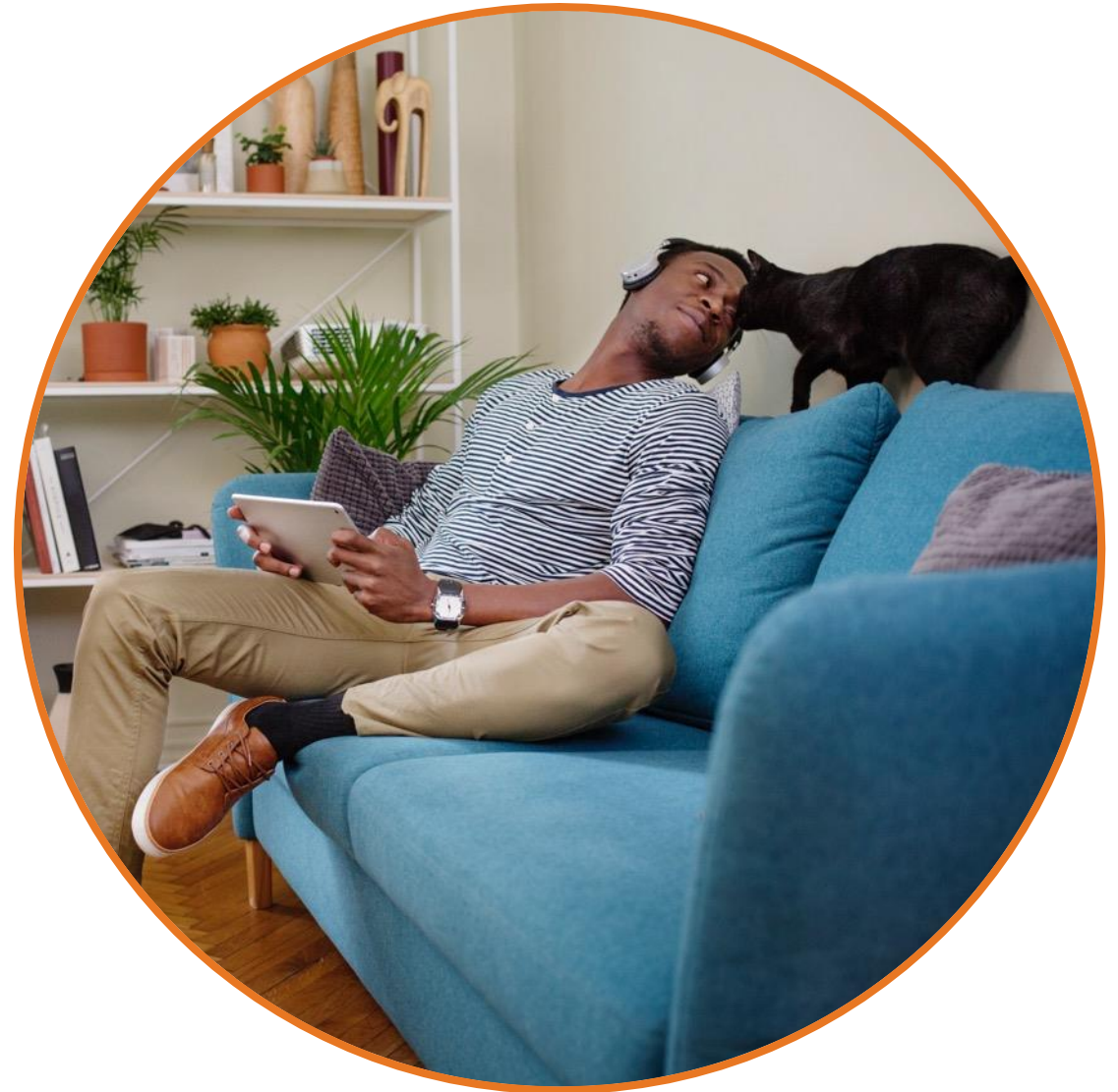
**What you can do to  
improve retention NOW**  
**Simple steps to boost  
your program's health**



# Conduct an Acknowledgement Audit

## Review your acknowledgements objective and critical eye

- Make a gift by check through the mail to your program
- Track its progress from date cleared to acknowledgement received
- As a donor, ask yourself, “Do I feel like this organization cares about me?”
- How can you make your donor feel like they are a valued partner in your work?





# Fire up the phones

## Robocalls/Texting

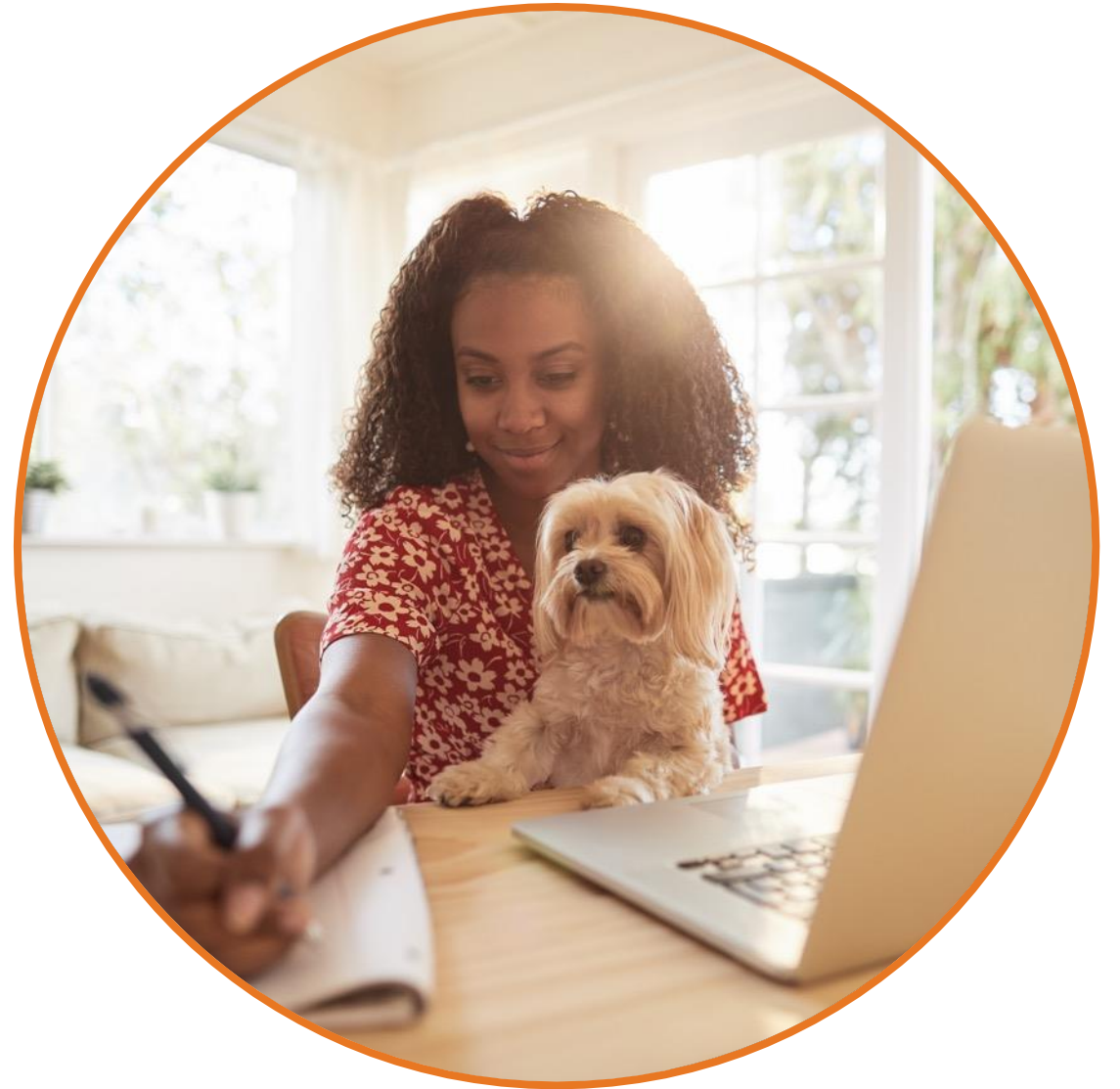
- A fast, additional touch point that lets donors know you received their gift.
- Donors can listen to the message or read the text at their convenience and will appreciate the quick response!



# Evaluate your Welcome Series

## 3 Part Formula

- Acknowledge and Welcome
- Case for Support – Demonstrate your achievements and why you need continued support. Also, Ask for Feedback – use a survey to show you value their thoughts in addition to their dollars.
- Sustainer Ask



## Consider these metrics

### Run These Numbers and Keep Them Close

- % of funds provided by the top 10% of donors
- % of names in the database who have not donated in 2 years.
- Average lifetime value of your donors (LTV)





# Conduct an Acquisition Audit

## Review your Case for Giving

- Is your control package strong enough to acquire not just 1 but 2+ gifts?
- Why is your organization a great investment for the donor?
- Is your CTA compelling, urgent, clear?
- Make sure the language is very donor-centric and very team-effort oriented.

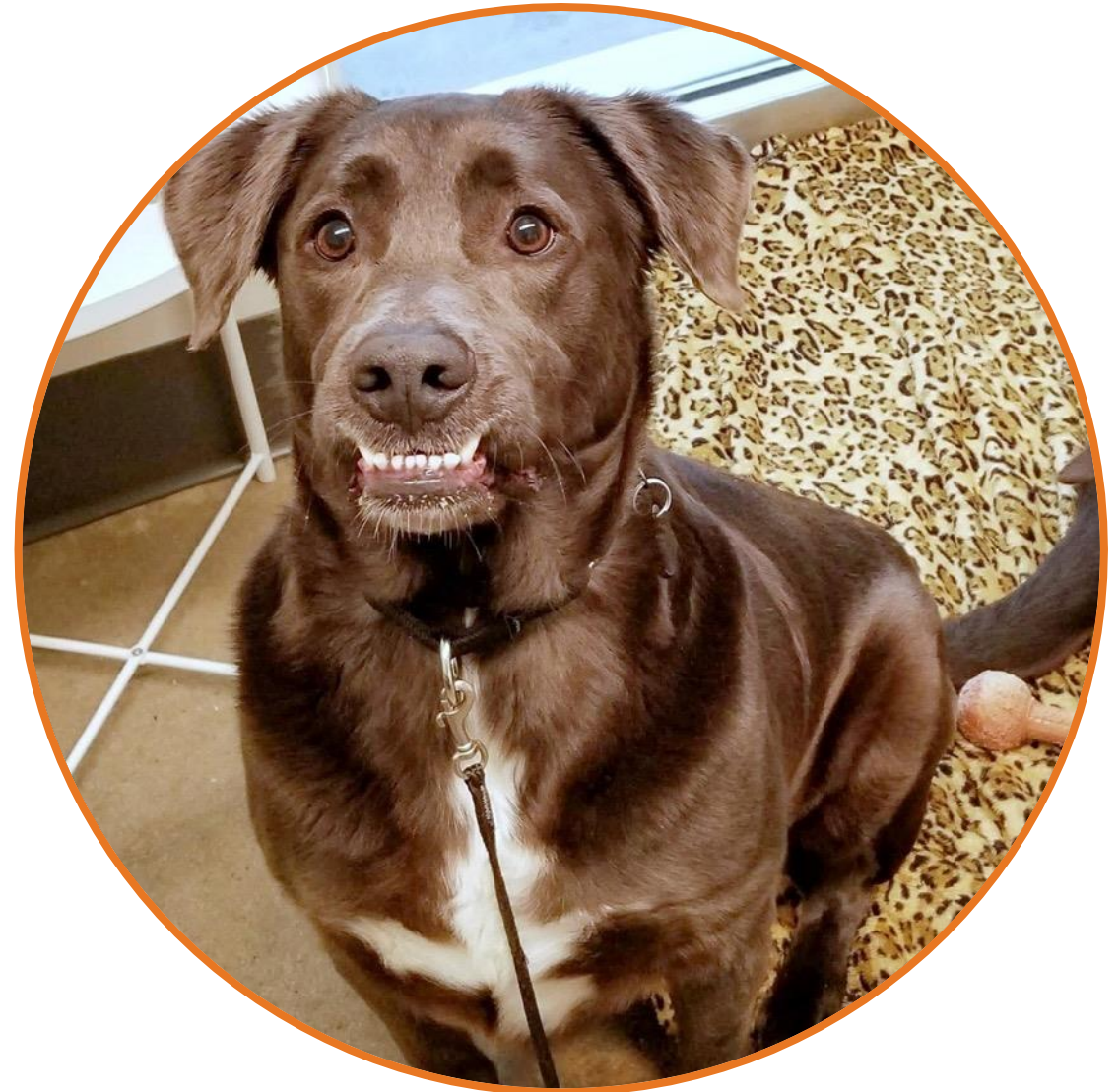




# Conduct an Acquisition Audit

## Review your Lists

- Dig into your results to find the lists that result in the most second gifts (and the fastest second gifts!)
- Which lists are bringing the highest average gift? Inception amount has a significant impact on retention!



# Change up your messaging cadence

## Offer a Premium Later in the Series

- Premiums are typically used as bait in acquisition
- Offer in touchpoint #3 or #4 in an effort to hasten that second gift



# Convert to monthly giving ASAP

## Ask Early and Often

Early in the relationship is your best odds of converting to monthly so make sure you're offering that option ASAP!





# Think Different

## Get More Mileage from your Multis

Include new donors in your multi drops. Donors are as likely to give again to the control as they are to a Welcome Series.





# Think Different

## Don't Wait!

- Try mailing new donors who haven't made a second gift in the first 90-120 days in acquisition.
- There's a good chance they love your control and will give to it again – but don't wait until 12 months pass before trying this!



A light-colored dog, possibly a Weimaraner, is lying on a blue couch with a dark tabby cat. The dog is resting its head on the cat, and they appear to be sleeping or resting together. In the background, there are colorful cushions and a window with light coming through.

Thank  
You!

**Contact us:**

Nosa Adetiba [nosa.adetiba@aspca.org](mailto:nosa.adetiba@aspca.org)

Marne Lopez [marne.lopez@epsilon.com](mailto:marne.lopez@epsilon.com)

Valerie Vierengel [vvierengel@K2Dstrategies.com](mailto:vvierengel@K2Dstrategies.com)