



PBS SUSTAINER LEARNING CENTER SUSTAINER ESSENTIALS CHECKLIST

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Lay the Groundwork:

- ✓ Get your management or board on board
- ✓ Work with finance on cash flow projections
- ✓ Make sure someone is in charge of your program – designate an “expert”
- ✓ Name and brand your program
- ✓ Select and set up payment options – will you accept check payments? Will you process payments monthly? Will you allow other billing periods such as quarterly or semi-annually (not recommended)?
- ✓ Make sure all payment-related vendors are PCI compliant
- ✓ Eliminate 12-month installment and check payment options on all solicitations and online forms
- ✓ Prepare your database for credit card processing and/or Electronic Funds Transfer (EFT) and determine how often and on what dates will these be processed?
 - Recommend daily for credit cards and weekly, bi-monthly or monthly for EFT. Stay away from the 29th, 30th, or 31st, or payments will be missed on certain months.
- ✓ Prepare for processing mishaps – set up a process for re-running failed credit cards and for contacting donors when the payment is not captured
- ✓ Set up your source code structure – this includes deciding how the money will be counted
 - Traditionally, new sustainer revenue is allocated to the manner in which it came in. After 12 months, the source is changed to “sustainer.”
 - During on-air drives, the annual sustainer amount is traditionally used when tallying goals
- ✓ Set up data entry protocols – for new sustainers, and also for upgrades, downgrades, additional gifts, cancellations and un-recaptured payments
- ✓ Choose a minimum monthly contribution amount
- ✓ Determine if there will be any benefits accompanying the program
- ✓ Determine whether ongoing sustainers will be offered thank you gifts each year and how this will be communicated
- ✓ Determine whether event tickets can be secured on the air through a sustainer gift
- ✓ Train and prepare your data entry staff
- ✓ Train and prepare your customer service staff
- ✓ Ensure the auto-renew process is set up and working in your database
- ✓ Set goals and benchmarks to measure success

Think Ahead:

- ✓ Determine an acknowledgement and a tax letter plan
- ✓ Create a plan for how to communicate with sustainers across the year
- ✓ Make a plan for recapturing sustainers whose credit cards stop working
- ✓ Set up a reporting and monitoring structure – not just for new sustainers – but also for failed charges, recapture success rates, and reasons for canceling pledges

Get Online:

- ✓ Develop a sustainer landing page
- ✓ Make the sustainer donation option obvious and appealing
- ✓ Differentiate the online forms for one-time and sustainer giving
- ✓ Create homepage links, light boxes, or other online advertisements

Get On-Air:

- ✓ Prepare scripting and messaging for on-air
- ✓ Prepare training information and orient producers, on-air hosts and volunteers
- ✓ Write on-air spots to play year-round

Set Your Annual Plan:

- ✓ Decide how to promote the sustainer program in the mail
- ✓ Choose a telemarketing firm and decide how often you want to call
- ✓ Consider canvassing
- ✓ Ensure all membership collateral is updated with sustainer language
- ✓ Keep your eye on the winning stations for great ideas