

PBS SUSTAINER LEARNING CENTER | TEAM APPROACH CODING STRUCTURE PROTOCOLS

Sustainer source codes should always follow the basic coding criteria, but with specific enhancements to allow for strategic acquisition tracking, rollover, upgrade and additional gifts within monthly sustainer donations.

A basic TeamApproach source code looks like: AMR150110101

The digits mean:

AMR: Annual Membership Renewal

1501: mailed in January 2015

10: first effort (this is often reversed as 01)

10: first segment

1: direct mail (this final code is often used to delineate mail, email, TM, etc. techniques)

CODING NEW SUSTAINERS

When acquiring a new sustainer, whether the donor has contributed in the past, or is brand new, the **source code** should reflect the direct activity that the donor responded to. For example, if a donor contributed during an on-air campaign in January 2015, the code would be AOP150102006 to indicate that their donation was in response to the on-air campaign.

Then the second step is to use an 'SG' **gift kind code** to identify the donation as an ongoing sustaining gift. Additionally, a **classification code** along with their associated method of payment (EFT or credit card) must be used to identify that this membership should auto-renew. Note: Classification is also an effective way to exclude sustainers from direct mail that is only intended for one-time payment donors.

ROLLING DONATIONS OVER

In Team Approach, donors are rolled over typically once each year in order to enable their donations to continue on for another year. This is called the BAR. When *first year sustainers* are ready to go through the BAR for the *first time* the source code should be changed to a Sustainer-specific code – for example, Sustainers going through BAR in January 2015 would receive the new sustainer source code: ASR150101001.

HANDLING UPGRADES

As donors continue with your organization, many are likely to increase their support in response to a direct mail, telemarketing or on-air appeal. Upgrades also follow a membership coding structure, but with the second character recognizing the upgrade is for monthly sustained giving, and the third character recognizing the effort they responded to was intended to solicit an upgrade: ASU150101001.

HANDLING ADDITIONAL GIFTS

Many stations occasionally solicit one-time gifts from a traditional additional gift appeal. While the majority of the code should follow the rest of the membership coding structure, sustainers should be segmented separately for proper analysis of the effort.

The code may be segmented in one of two ways. 1) If a regular membership segment in the mailing would receive the code AMA150101101, then the Sustainer segment may be separately tracked by creating a separate segment within the mailing: AMA150101201. 2) If the additional gift effort is going out *only* to Sustainers, or the funds will benefit only the Sustainer budget, the segmentation may come earlier in the code structure, with the second character moving from 'M' for membership to 'S' for sustainers: ASA150101101.

HANDLING LAPSED

Once sustainers have lapsed and initial efforts at recapturing payment methods have failed, then sustainers should be included back in regular lapsed efforts. It is unnecessary to segment sustainers separately – segmenting these donors by TAG or expiration year is adequate. If specific segmentation to track sustainers is desired, doing so at the segment (tenth character) is advisable.