



PBS SUSTAINER LEARNING CENTER SAMPLE CUSTOMER SERVICE GUIDELINES

Sustaining Membership Donations – Best Practices

A Sustaining donation is a membership type that provides ongoing monthly support of KVIE. KVIE only has two donation options: One-time or Sustaining

Sustainer talking Points

- Sustaining membership does not expire, sustaining members provide ongoing long-term support
- KVIE does not offer installment plans or donation financing. Since KVIE is not a retailer, we do not have a payment plan the options are a one-time donation or becoming a sustaining member
- **“What is a sustaining membership?”** Sustaining membership is an ongoing monthly contribution in support of KVIE Public Television and our programming. It is not an installment plan, meaning that it does not stop automatically and you don't ever have to worry about renewing.
As a sustaining member, you have the benefit of receiving our OnSix monthly programming guide, access to KVIE Passport, and of selecting a thank-you gift once per year. To add a gift you would just give us a call at Donor Services and we would adjust your monthly donation amount according to the level of the new gift selected. If more than one gift is chosen in a year, the donation level amounts are combined (since we can only have one sustaining membership per donor).
- **“I didn't sign up to be a sustainer. I was just doing installments.”** We only have two methods of donation: either the **one-time donation** or **ongoing monthly donations**, we do not have installment plans. Because KVIE is a non-profit and not a retailer, we do not have the ability to offer payment plans. I'm sorry for the confusion, but the word **“sustainer”** is stressed heavily during our pledge drives.
- **“How long until it's paid off?” or “What's my balance?”** These monthly donations are a part of a sustaining membership, which is ongoing and does not have a set end date, however the anniversary of this membership is _____. I see that your anniversary will be reached on (Date), however these donations will continue indefinitely. You may give us a call back at that time if you wish to withdraw your support.

When a person calls in to cancel or end their SG the following factors should be taken into consideration

- Is there a thank you gift on the donation in the past 12 months?
- Is there a positive donation history or records of cancelled donations, failed payments, stations losses?
- Was the FMV of the thank you gift covered?
- **“I want to stop my monthly donations now.”** I'm sorry to hear that. May I ask why you wish to withdraw your support?
 - **If there is a gift on the pledge:**
 - **A.** If the item is unopened and it is within 45 days of shipment, it can be returned to KVIE and the membership can be stopped.
 - **B.** We would be happy to convert this pledge to the one-time annual amount. The one-time pledge level for the gift that you selected was \$____ and since you have already made (#) \$____ donations, the remaining amount is \$____. Would you be willing to complete the donation with a contribution of \$____?
 - **“No.”** KVIE spends a significant amount on thank you gifts, (Gift) has a Fair Market Value of \$____. Would you be willing to continue your \$____ monthly donations a few months longer to cover this amount? You can call us back in a few months to stop the donations.
 - **“No.”** Would you like to keep your membership active and still receive the monthly guide, either reducing the monthly donation amount or making an additional one time donation?
 - **“No.”** Since the amount donated did not reach the (one time donation level/FMV) for the gift that was received, we ask that any future donations be made using the one-time method, since as a non-profit we rely heavily on our supporters and cannot afford to have unfulfilled donations. The donations will be stopped as of today and this will terminate your membership with KVIE.
- **If there is no gift on the pledge:**
 - Offer to reduce their SG amount so they keep their membership active and continue to receive the KVIE OnSix Guide and have access to KVIE Passport.
 - **“No.”** The donations will be stopped as of today and this will terminate your membership with KVIE. Thank you very much for your support.
 - If not, graciously thank them for their support, cancel the SG donation, and let them know that we hope they continue to enjoy KVIE and that they are able to join again in the future.
 - Expire their membership to the first of the month following the last payment date to get them in the renewal cycle and expire then in Mvault.
- FAQs may be found at kvie.org/ongoing

Adding a TY gift to a SG

- Do they have a TY gift on the record already?
 - Yes: increase the SG using KVIE's procedure
 - No: is the SG amount appropriate for the stated pledge level (within 20%)
 - Yes: Add the gift
 - No: Offer to increase the SG to a reasonable level keeping the stated pledge level and the donation history in mind.

Tips to keep as SG member active

- Offer to switch payment types in the payment method keeps declining
- Offer to switch payment dates in the payment method keeps failing
- KVIE spends a significant amount of money on thank you gifts
- KVIE recognizes the commitment of our SG members by processing the thank you as soon as an SG begins, however the one-time donors must contribute the entire donation level before their thank you gift is processed
- KVIE relies on our supporters and we cannot afford to have unfulfilled donations
- Sustaining memberships provide ongoing support of your favorite KVIE programs and does not have a set end date
- Because KVIE is a nonprofit and not a retailer, we do not have the ability to offer a payment plans or layaway payments that have a set number of payments. KVIE memberships are made through one-time donations or through sustaining memberships.
- Use terms like: terminate your membership, KVIE relies on you, nonprofit,

Why stay a Sustaining member after a year?

- Keeps the mail down, by reducing renewal mail
- Keeps the guide coming
- Entitled to participate in the member survey
- Membership is always active and never expires
- A thank you gift each year
- Provides long term reliable consistent support KVIE.
- Reduces KVIE's administrative costs
- Easier on your budget
- No checks to write, no payments to mail
- membership is always active, no need to renew
- Easy for you, better for KVIE, and good for the environment

Don't mark a Giving/Opty closed lost or uncollectible the same day you leave or send a message requesting updated payment info. It is difficult to reverse an uncollectible Giving/Opty and we need to give the donor time to take the actions requested.

Per the Donor Service Representative Best practices: Unpaid donations should be closed and marked closed/lost or uncollectible after seven contacts and three months. The seven contacts must include at least one of each of the following methods: email, phone call, and letter.

Combining Sustaining Donations

There are three situations to be dealt with when a donor pledges for a sustainer and already has one open. These donations are flagged upon batch processing and have to be dealt with manually.

Case 1: Donor's established sustainer has 8 or fewer months of donation.

- Uncheck the sustainer flag from the established sustainer, but don't shut it down yet.
- Process the new sustainer onto the donor's account.
- Allow the first donation to process.
- Once the first donation processes successfully, add a payment end date to the old sustainer, shutting it down.
- Add the two donation amounts together for a new monthly giving amount.
- Add a "Combined SG Letter" activity to the first combined donation so that they will be sent a letter letting them know their donations have been combined.

Case 2: Donor's established sustainer has 9+ months of donation, and the new sustainer amount is GREATER than the established sustainer.

- Uncheck the sustainer flag from the established sustainer, but don't shut it down yet.
- Process the new sustainer onto the donor's account.
- Allow the first donation to process.
- Once the first donation processes, and the payment method verified, add a payment end date to the old sustainer with the lesser giving amount, shutting it down.
- Add a "Double SG" activity to the new sustainer, so it will be clear that their old donation was halted in favor of the new.

Case 3: Donor's established sustainer has 9+ months of donation, and the new sustainer amount is LESSER than the established sustainer.

- Change the giving amount on the batch upload to be the already established sustainer amount.
- Uncheck the sustainer flag from the established sustainer, but don't shut it down yet.
- Process the new sustainer onto the donor's account, at the old sustainer level.
- Allow the first donation to process.
- Once the first donation processes, and the payment method is verified, add a payment end date to the old sustainer, shutting it down.
- Add a "Continuing SG at old amount" activity to the new sustainer, so it will be clear that we are continuing at the already established amount.
- If the donor calls to ask why they received a confirmation letter at their old amount, we can say that the donation was continued at the already established amount but the letter is generated automatically to confirm the pledge and the thank you gift.

Email Template

Dear,

We are sorry to hear that you wish to terminate your membership with KVIE Public Television.

Sustaining memberships provide ongoing support for KVIE and to thank you for your support, we send a thank you gift right away. KVIE spent a significant amount of money on the(Gift) that was selected as a thank you gift. Donors who do not wish to be sustaining donors contribute the one-time amount to receive a thank you gift. The one-time donation level for the thank you gift that you received is \$___.

Are you able to complete the pledge with a donation of \$___? That way KVIE can convert you to the one-time donation level, the monthly donations will stop, and you'll be able to keep your membership active with KVIE.

More information on KVIE's sustaining donation program including frequently asked questions may be found at kvie.org/ongoing/.

If you do not wish to continue your monthly donations or contribute the \$__ to complete the pledge, KVIE can terminate your membership. Please reply to let us know which option you prefer.

Thank you for your support of KVIE Public Television. KVIE relies on support from its members all over the Central Valley to provide quality programming for our community.

Best wishes,