

# Monthly Giving MADE EASY

A Comprehensive How-To Guide  
Filled with Examples and Case Studies



*The best time to plant a tree was 20 years ago.  
The next best time is NOW.*

Erica Waasdorp



## Monthly Giving Made Easy: A How-To Guide

Copyright © 2021 by Erica Waasdorp

First edition

All rights to this publication and its contents are reserved. No part of this work may be reproduced, stored in an information retrieval system, or transcribed in any form by any means—graphic, electronic, or mechanical—without written permission from the author.

The author has however created and made downloadable resources available on [www.adirectsolution.com/monthly-giving-made-easy](http://www.adirectsolution.com/monthly-giving-made-easy). Those are for the explicit use and customization of the user.

Some of the examples in this book are copyrighted materials. They are reproduced for education purposes only, under “fair use” provisions of U.S. copyright law. They are selected at the discretion of the author as they represent principles discussed in the text.

Printed in the United States of America

Book Design by Susan Oslund, BlueSky DesignWorks

Edited by Rebecca Ruark

Proofread by Eileen Keegan

ISBN: 978-0-9859683-2-8

E-book ISBN: 978-0-9859683-3-5

Library of Congress Control Number: 2021908974

For more information, write or call the author:

Erica Waasdorp  
PO Box 757, Marstons Mills, MA 02648  
Tel. 508-776-1224  
Email [erica@adirectsolution.com](mailto:erica@adirectsolution.com)  
[www.adirectsolution.com](http://www.adirectsolution.com)

Find resources and downloadable tools at:  
[www.adirectsolution.com/monthly-giving-made-easy](http://www.adirectsolution.com/monthly-giving-made-easy)



*If you can dream it, you can do it.* – Walt Disney



## ACKNOWLEDGEMENTS

Since I wrote my first book on monthly giving, late in 2012, much has changed in the fundraising world.

- All payment processors and donor base Customer Relationship Management (CRM) systems now offer recurring gifts.
- Numerous new monthly payment options have been introduced and automatic bank transfers (EFTs) have become more common.
- Email and social media have become very powerful channels.
- Terminology has expanded or been updated: sustainers, recurring gifts, and monthly gifts, are used interchangeably.

I realize that some organizations are offering quarterly and annual regular gifts and that's totally fine, of course. Monthly donors still tend to give the most money and they are still best in helping nonprofits with that crucial ongoing sustainable cash flow. For consistency, you will find that I will use “monthly donors” throughout.

Nonprofits have become more aggressive and consistent in making monthly giving part of their plans. As a result, monthly gifts have started growing. Those organizations that have been at it, are seeing on average 15% of their donors now giving monthly.

However, there is still a long road ahead. There is still that hesitation. There is still that internal battle between the short-term and long-term mindset. Harvey McKinnon's recent book, *How to Create Lifelong Donors Through Monthly Giving*, addressed this yet again.

I saw the need for a practical how-to guide, with examples of how monthly giving can grow with often minor tweaks to your current program and approaches. I trust that *Monthly Giving Made Easy* will be just that how-to guide. **Because monthly giving is not hard. You just must want to go for it.**

This book will not give you one solution, as there are many great ones. The number of options and multi-channel integrations keeps growing. Just keep in mind, start with what you have and build from there.

**My first thank you** is to my clients, my presentation attendees, email list subscribers and you, fundraiser. You try something new by making monthly giving a thing and you come up with new creative ways to generate more monthly donors. There is no end to monthly donor opportunities and you make it happen. You'll find several anonymized case studies in this book. I wouldn't be able to write this book without you!

**My second thank you** goes out to the payment processors, donor base CRMs, banks, etc. who have made monthly giving much easier to incorporate. The technological tools exist so there is really no excuse not to start. Many have hosted training, tools, and resources to help train more nonprofits on their specific tools: Bloomerang, Donorperfect, Qgiv, Firespring, Sumac, Blackbaud, Neon One, Charity Engine, ROI Solutions, Little Green Light, and many others.

An additional shout-out goes to the many companies and fundraising software and payment solutions options. Stripe, Fundraise Up, Donor Box, Charity Engine, Classy, PayPal, IATs, Authorize.net, etc. Without your adoption of monthly giving, none of these monthly donors would be possible. There are simply too many to name. Thank you!

**My third thank you** goes to publications, associations, and webinar providers who have hosted my blogs and presentations. Nonprofit Pro, Charity How To, Moceanic, Direct Marketing Association of Washington, Direct Marketing Fundraisers Association, DonorSearch, TopNonprofits, Association of Fundraising Professionals, Professional Face to Face Association, ADRP, NAYDO, and many more.

**My fourth thank you** goes to the many wonderful consultant colleagues who too have hosted training and posts to help spread the word about the importance of monthly giving: Harvey McKinnon, Ken Burnett, Jay Love, Pamela Grow, Brady Josephson, Gail Perry, Ligia Peña, Maureen Wallbeoff, Julia Campbell, Jim Eskin, Tom Ahern, Denisa Casement, Lisa Sargent, Nhu Te, Claire Axelrad, Marc Pittman, Steven Shattuck, Rachel Muir, Larry Johnson, Sean Triner, Christiana Stergiou, Dan Sonners, Sandy Rees, Sherry Bell, Kelly England, Kathleen Zwiener, Tim Sarrantonio, Roger Craver, A.J. Steinberg, Steven Screen, Mazarine Treyz, Chad Barger, Liz Murphy, Anne and Josef Kottler, and so many others. A special remembrance for John Haydon and Simone Joyaux (RIP).

If I forgot your name, please note that this was certainly not done on purpose. Consider yourself named. Thank you!

This book is dedicated to my mom and dad, Lida and Bram Waasdorp, who gave me my Dutch heritage, a wonderful solid upbringing, and many wonderful skills and talents, especially the grit to move to a different country, start my own business and write books!

Of course, this book is not complete without a shout-out to my sisters Monica and Hellen and brother Ron and their spouses Gerald, Ron and Marlies, who put up with me for so many years when they saw that “drive” develop. I love you all!

Finally, none of what I do would be possible without the steadfast support from my best friend and love of my life, Patrick McNamara. He filled my “boat” with our kids Brendan and Patrick II, his wife Leslie, and our grandkids Kenan, Saoirse, Tadgh— and our rescue cat Mientje. 🌿





# TABLE OF CONTENTS

<b>PART I: Introduction</b> .....	<b>3</b>	<b>PART IV:</b> .....	<b>36</b>
<b>PART II:</b> .....	<b>4</b>	<b>Monthly Donor Acquisition</b>	
<b>Reasons Why Monthly Giving Is Worth It</b>		31. Acquisition General .....	36
1. Monthly Giving Is Donor-Centric.....	5	32. Use Drip-by-Drip Approach.....	37
2. Monthly Donors Give More Money .....	6	33. Start Small.....	38
3. Monthly Giving Improves Donor Retention.....	7	34. Ask Donors Why They Give Monthly .....	39
4. Monthly Donors Provide Unrestricted Funds .....	8	35. Use Your Stories And Your Numbers....	40
5. Monthly Donors Help Sustain You In Times of Crisis .....	8	36. Memberships Welcome .....	41
6. Monthly Giving Doesn't Take Much Time .....	9	37. Create Your Plan .....	42
7. Monthly Giving Is Not Expensive .....	10	38. Cost Per Monthly Donor Will Vary.....	44
<b>PART III: Prepare for Success</b> .....	<b>11</b>	39. Use Your Home Page .....	45
8. Put Someone In Charge.....	12	40. Use Email.....	46
9. Make Monthly Giving A Thing.....	12	41. Use Reminder Emails.....	48
10. Take Down The Silos.....	13	42. Use A Welcome Email Series.....	48
11. Join Monthly Donor Programs.....	14	43. Use Your Email Signature.....	49
12. Create A Monthly Donor Name .....	15	44. Use An Extra Button .....	50
13. Visualize Your Goal .....	17	45. Use A Match Campaign .....	51
14. Annualize The Value .....	17	46. Use (Video) Testimonials.....	54
15. Think Long-term.....	18	47. Use A Tick Box On Appeal Reply Forms.....	56
16. It's Okay To Repurpose.....	20	48. Use A Targeted Special Mail Appeal.....	58
17. Find The Right Tools .....	21	49. Use A Targeted Version Of An Appeal .....	61
18. Decide If You Need A Donor Account..	23	50. Use A Survey.....	62
19. Track Donor Feedback.....	25	51. Use An Insert.....	63
20. Consider The Fees.....	26	52. Use A Postcard .....	63
21. Consider Payment Options.....	26	53. Use The Telephone.....	64
22. Consider Ask Amounts.....	27	54. Use Social Media and Video .....	65
23. Create A Monthly Donor Only Form ....	28	55. Use A One-step Approach .....	66
24. Offer A Downloadable Form.....	29	56. Use A Two-Step Approach.....	67
25. Create A Monthly Donor Info Page .....	29	57. Use Text Messaging .....	69
26. Add A Nudge Or Social Proof.....	30	58. Use An Integrated Campaign .....	71
27. Test Forms Before Going Live.....	31	59. Create A Monthly Donor Month.....	72
28. Review And Write Down Your Processes .....	32	60. Create Your Monthly Donor Plan And Stick To It.....	73
29. Include Finance.....	34	61. Asking Often Will Result In More Monthly Donors .....	73
30. Embrace The Details.....	35		

**PART V: ..... 75**

**Monthly Donor Recognition  
and Cultivation**

- 62. Recognition And Cultivation General... 75
- 63. Make Donors Part Of A Community.... 77
- 64. Keep Benefits Simple..... 77
- 65. Think Of Something Surprising..... 78
- 66. Send Welcome Letter By Mail..... 79
- 67. Call Monthly Donor To Say Thank You ..... 80
- 68. Recognize “Hidden” Monthly Donors ..... 80
- 69. Update Receipt Emails..... 84
- 70. Send Regular Updates..... 85
- 71. Use Thank You Video ..... 87
- 72. Send Surveys..... 88
- 73. Send Tax Letter ..... 88
- 74. Use Text Messaging ..... 89
- 75. Confirm Changes In Writing..... 90

**PART VI: ..... 91**

**Monthly Donor Retention**

- 76. Retention General ..... 91
- 77. Prioritize Failed Payment Follow-Ups..... 93
- 78. Try Saving Hard Cancels ..... 95
- 79. Write Down Your Retention Process .... 97
- 80. Create A Monthly Donor Retention Day ..... 98
- 81. Calculate Monthly Donor Value At Risk ..... 99
- 82. Pull Out All Stops To Get Updated Information..... 99
- 83. Use Credit Card Updater..... 101
- 84. Convert Check Or Card Monthly Donors To EFT/ACH..... 102
- 85. Reactivate Lapsed Monthly Donors.... 104

**PART VII:..... 106**

**Monthly Donor Upgrades**

- 86. Upgrades General..... 106
- 87. Time Your Monthly Donor Upgrade Ask..... 107
- 88. Review Your Systems For Upgrade Options ..... 108
- 89. Ask Monthly Donor To Commit To New Amount ..... 108
- 90. Ask Monthly Donors For Upgrade Through The Mail ..... 110
- 91. Ask Monthly Donors For Upgrade By Phone ..... 111
- 92. Ask Monthly Donors For Upgrade By Email..... 112
- 93. Ask Monthly Donors For Extra Gifts ..... 113
- 94. Ask Monthly Donors For A Legacy Gift..... 115

**PART VIII: ..... 118**

**Celebrate Monthly Donor Wins**

- 95. Congratulations ..... 118

**DOWNLOADABLE RESOURCES..... 121**

**ABOUT ERICA WAASDORP ..... 122**



*We keep moving forward,  
opening new doors, and  
doing new things, because  
we are curious—and  
curiosity keeps leading us  
down new paths.*

-Walt Disney



**TODAY** is the day to  
open the new door  
and start generating  
more monthly  
donors than you ever  
imagined.

***Are you  
ready?***





# PART I



## INTRODUCTION

This book is written for organizations of all sizes, using the limited resources and channels available to all.

What you will not find here are examples of the more expensive channels for generating monthly donors, like tele-fundraising, face-to-face, street fundraising and direct response television. My first book, *Monthly Giving: The Sleeping Giant*, extensively describes those, and they are very worthwhile channels to use as you grow larger monthly donor programs.

For this book I tried to find examples from all different types and sized organizations. I believe that 99.9% of all examples could serve your nonprofit. You simply must use your own imagination, creativity, and story.

If the pandemic of 2020 taught us anything, it's the importance of sustainable revenue that keeps coming in, no matter what happens!

That's where monthly giving comes in. Those nonprofits that had monthly donors were in much less of a pickle than those that didn't.

Yes, you might say, that's all great, but don't these monthly donors drop out the minute there's a disaster? Nothing is further from the truth! Looking back on 2020, we can honestly say that monthly donors really stuck with the organizations they supported.

While there might have been a slight increase of cancellations in the first month of the pandemic, cancellation rates went right back to typical levels the next month. And those organizations that were pro-active and offered pauses or lower amounts managed to prevent more cancellations.

Monthly donors care. Monthly donors commit to your nonprofit. It takes an awful lot to make them stop. But rather than worrying about that, let's see how you can grow your monthly donor program to higher levels so you're prepared for the next disaster, whatever and whenever it may be.

I hope that this practical monthly giving how-to guide, including the case studies, examples, and some quick exercises, will help you (re)focus your time on your donors and generate more monthly donors because of it! 🌱



*The secret to change is to focus all of your energy not on fighting the old, but on building the new.* – Socrates

## PART II



### REASONS WHY MONTHLY GIVING IS WORTH IT

During a recent webinar, someone asked me a question. His finance people told him: “For \$5 a month, it’s not worth the effort. The finance charges are killing us.” This is one of those monthly donor myths I’d like to debunk right away. My answer was: “Yes, offering the \$5 a month option to donors is totally worth it!”

Here are 10 reasons why:

1. **You’re truly showing donor care.** No gift is too small. Your donor can make a difference with an amount that’s most comfortable for them. Also, younger donors are more comfortable with smaller amounts.
2. **You can upgrade small monthly donors to higher levels within the year.** And if you do it right, 12% to one third of your monthly givers will indeed upgrade at least every so often. And you can generate extra gifts.
3. **Even small monthly donors can leave you in their will.** A small animal rescue that just started out with its monthly donors already got a \$195,000 bequest from one of its small monthly donors.
4. **Recruitment fees for monthly donors are minimal.** If you have an email system and you have an online donors page, you can generate monthly donors.
5. **Finance fees are not that high.** Typically, it is about 3% of the monthly gift plus perhaps a fee of \$0.30 each. So, for a \$5 gift, that’s \$0.45, which means you still keep \$4.55, according to my calculations.
6. **If you annualize the value of that small \$5 a month donor, it’s going to be \$60 before fees—roughly \$54.60 after fees.** Nothing to sneeze at.
7. **Many online systems allow the donor to pay for the fees,** and more than 70 percent of donors do this. You’ll end up with the full amount, so a non-issue.
8. **The average monthly donor gives \$25 a month, thus the \$5 a month givers are outliers.** I’ve seen recent studies where it’s even more, sometimes even \$50

to \$63 a month. It all depends on the value of your current donors, the type of organization, the channel used and how much effort you put into it.

9. **Your response rate will go up if you ask for a lower amount.** Make it easy on your donor to understand how they can make a difference with different amount options, and your donors will determine what they can afford. That's the gift they'll make, and that's the gift you should be grateful for.
10. **Typical monthly donors stay with you for five to seven years,** and often even longer. Just think about the loyalty factor here.

We all want people to make \$1,000-plus gifts, but that's just not reality. Would you stop asking donors to give gifts online just because of credit card fees? Of course, you'll encourage your donor to make their gift in any way possible, right? You wouldn't succeed in your job as a fundraiser otherwise.

Having worked with nonprofits, growing their monthly donor programs for the past few decades, I've learned that we fundraisers sometimes have to push back a little bit to our finance folks, sorry.

Perhaps this Dutch saying may be helpful: "He who doesn't honor the small, isn't worthy of the big."

Your donor is willing to make a commitment for many years. Will you deprive him or her of that joy because you're too greedy at first and scare him or her off? You could be giving up a lot of future funds because of that mindset.

In the following, you'll find many more reasons why monthly giving is totally worth it.



## 1. Monthly Giving Is Donor-Centric

Your nonprofit is essential. Your clients, patients, children, animals, etc., would not get the help they need without you! But did you tell your donors? Did you express how much you need them and value them?

**Well, here is another really great way to express how donor-centric you can be.**

By giving your donors the *opportunity to help you!* By allowing them to support you in a way that works best for them, their schedule, and their budget.

I learned a long time ago that we can never assume anything. That's why direct marketers and fundraisers test. What we think may not always be right. Donors cannot read our minds and we can't read theirs! We must not assume that donors do not want to help. We must not assume that donors do not have the funds to help.

We can however give donors the opportunity to help by letting them know we need them. We can give donors the choice to make a smaller or larger gift. We can give donors the choice to make a one-time gift or a monthly gift.

Donors will do what they can, and monthly giving is a great way to allow them to make a difference in a way that works best for them.

One of the organizations I work with includes a choice of one-time or monthly gift in every email and every appeal. And at every giving opportunity, there are donors who choose to make a monthly gift.

Donors can make a gift through their preferred channel (mail, online, or phone) from their preferred platform (computer, tablet, or smartphone) at their preferred time of day with the type of payment they prefer (card, bank, PayPal, or other) at the frequency and the amount that works best for them.

Can it get any more donor-centric than that?



## 2. Monthly Donors Give More Money

The statistics are all over the map. Some organizations are seeing monthly gifts range between \$12 and \$19, \$23 to \$25, with some even as high as \$50 to \$63.

It all depends on how many donors they have, what their typical one-time gifts are, how long the organizations have been generating monthly gifts, which channel they used to bring them in, who they targeted and what they offer for “pricing.”

For example, if you’re a charity supporting the poor, the hungry, you can probably be very specific with your ask amounts (also called donor handles, ask strings, tangibles). See the example below.

**FOOD FOR THE POOR**  
Saving Lives... Transforming Communities... Renewing Hope

**OUR WORK      HELP NOW      PARTICIPATE**

**START A MONTHLY GIFT**

Triana, a 3-year-old from Guyana, desperately needs your help. All across the Caribbean and Latin America children like her are slowly starving due to lack of food.

Please, set up a monthly gift today to help these children get the food they so desperately need.

**MONTHLY GIFT AMOUNT**

Select Monthly Amount:

<b>\$36.48</b>	<b>\$18.24</b>	<b>\$12.16</b>	<b>\$6.08</b>
Feed 6 children a month	Feed 3 children a month	Feed 2 children a month	Feed 1 child a month

Enter an amount

Source: Food for the Poor website

If you're an animal welfare charity, you too can most likely be very specific.

But if you're a health organization, or an educational institution, or a public policy or advocacy organization, it's more difficult.

Regardless of what the monthly giving amount is, the typical monthly donor gives more money. Just look at the chart to the right.

The average one-time gift in the mail is \$58.

You can see how the average monthly gifts online are all over the map, with public media being the lowest at \$13 a month and hunger/poverty and international relief the highest at \$33 a month. On average, \$25 a month means \$300 a year!

Compared to the average one-time online gift of \$111, that means that monthly donors give three times more than one-time donors. And six times more than one-time donors through the mail.

<b>Single gifts only (mail)</b>	<b>\$58</b>
<b>Single gifts (online)</b>	<b>\$111</b>
<b>Monthly gifts (annually)</b>	<b>\$300-\$700</b>

Sources: M&R Strategic 2020, Network for Good 2019, Blackbaud Luminate Online Benchmark Report 2019, Neon One, Bloomerang 2020

**Exercise**  Where do you fall? What do your numbers look like now?  
Then try out the Monthly Giving Calculator and calculate your potential!  
[ see [www.adirectsolution.com/monthly-giving-made-easy](http://www.adirectsolution.com/monthly-giving-made-easy) ]

### 3. Monthly Giving Improves Donor Retention

If you still need more convincing that monthly giving is totally worth it, let's take a look at the wonderful infographic. This tells you that the average donor retention is 46%. What does that mean?



Source: Bloomerang/Fundraising Effectiveness Project ([www.afpfep.org](http://www.afpfep.org))

If you brought in 100 new donors last year, only 23% of them will make a second gift. If you look at 100 of your existing donors, 60% of them will make another gift.

By the way, this is also the reason why multi-channel donors retain at higher levels. If you can get someone to give in the mail as well as online, your donor retention immediately goes up. And vice versa, if you can get an online donor to give in the mail or by phone, you've just improved donor retention. Never be afraid to mix channels!

Well, if you can convert a new donor or repeat donor to give monthly, you'll improve retention to 90%! The sooner you can do this, the more donors you'll be able to keep. Focusing on monthly giving pays off!



If you'd like to run your data through the Fundraising Effectiveness Project to see where you fall, check out [www.afpfep.org](http://www.afpfep.org).



## 4. Monthly Donors Provide Unrestricted Funds

Fundraisers often ask me this, because they are not sure where monthly giving fits with their “annual fund.” The “annual fund” supports operating revenue, i.e., it is unrestricted.

The same applies to monthly donors. They provide unrestricted funds, and you can use it for whatever purpose you’d like.

Monthly donors invest in your organization. They are committed to your success and your mission. They are going to stay with you for a very long time. Perhaps even for as long as 20 years.

That is why I do not recommend asking monthly gifts for a particular project. Rather, make sure your monthly gifts go to “where it’s needed most.” Because monthly donors can and will stay with you for a long time. What if your project is done before they’re ready to stop giving? Now you must contact them to ask them to support wherever the need is greatest? Start there from the get-go!

Having said this, just because monthly donors are providing unrestricted funds, this does not mean you can’t contact them to tell them and ask them about a special project.

In the section about Monthly Donor Upgrades, you’ll find ways to ask monthly donors for extra gifts, and special projects are a great way to engage them even further.



## 5. Monthly Donors Help Sustain You In Times of Crisis

The life of a fundraiser isn’t always easy because life throws things at us nobody could ever expect. We knew tornadoes, hurricanes, ice storms, and wildfires were a reality. But who would have thought that planes would fly into the World Trade Center in 2001? Who would have expected a recession in 2008? Who would have thought we’d be dealing with a worldwide pandemic? Who would have thought...?

Things happen, and donors will help you get through them. If you ask. If you can get out in the mail, or if you can get your message out via email, social media, phone, or text, TV and any channel where your donor may be.

The good news is that gifts from monthly donors come in no matter what happens. It is money you can count on. The more monthly donors you have, the more money you can count on. It doesn’t mean that you don’t have to take action when the next disaster happens, but it sure will help you sleep better at night. Because when you know a certain amount of money comes in, you can keep the lights on and you can keep your crucial programs going.



Look at your budget. How much money do you need to keep the lights on? What if you could generate that much through monthly gifts? How many monthly donors would you need, knowing your current average monthly gift? Annualize your monthly donor revenue.

**What if** you had this amount of money coming in right now? Sustainable revenue, no matter the pandemic, no matter the stock market, no matter what happens. For many years to come!

What if you had this many monthly donors?

	# of Monthly Donors	Average gift	Average Yearly Gift	Cumulative
Totals	100	\$25	\$300	\$30,000
Totals	200	\$25	\$300	\$60,000
Totals	500	\$25	\$300	\$150,000

Source: A Direct Solution



## 6. Monthly Giving Doesn't Take Much Time

When I first started working in monthly giving several decades ago, generating monthly donors, and processing their monthly payments was a long, time-intensive, and somewhat expensive process.

How times have changed! Now, if a donor makes a monthly gift online, completes their information, and clicks the button, that gift is processed in seconds—real-time. And the payment processor will continue to process that gift amount every month.

Acquiring new monthly donors doesn't have to be a long process any longer. Rather, you can do a lot with one hour a week. How about taking one hour every Monday and making it “Monthly Donor Monday?”

Who does not have one hour a week to generate new monthly donors who each contribute an estimated \$300 a year?

You'll find many examples in this book of small tweaks you can make to your activities that can make a difference. A button or a “P.S.” in an email, a specially-focused email—you can send those out and see results the same day. Once you have your monthly giving page set up, you can link to it in a heartbeat.

Similarly, following up on monthly donors whose payment didn't come in doesn't have to take a lot of time.

When I managed my first monthly giving program, dealing with 7 countries, we were still sending tapes and disks to banks (and every country and bank was different). Fundraising emails didn't exist! Giving through online payment pages didn't exist.

Payment tapes had to be loaded first and only then were you able to generate reports. Only then could you see how many monthly donors didn't pay that month. Only then could you follow up. Mail and phone were the only two channels to do so.

Now if the monthly donor's credit card expires, you may be able to get a message ahead of time or, worst case, the day after the payment didn't come in. You can act right away. A quick text, email, call, or personalized letter can all be done in a day.

One hour a week, one call a day, can make a huge difference. Can you find one hour a week to focus on monthly giving?



## 7. Monthly Giving Is Not Expensive

I love hearing from fundraisers who share how they're doing with their monthly giving campaigns.

For example, one fundraiser sent me her socially distanced monthly giving video interview. She launched the video the day before #GivingTuesdayNow, and it generated 20 new monthly donors.

While it took a bit of time to create the video, the cost was virtually nothing, and it's now there to be shared for quite a while.

I talked to another fundraiser who shared how she implemented an expensive online giving platform to help her with peer-to-peer fundraising and monthly giving; however, the organization's database could have easily handled it all—if only she had evaluated her options.

There are so many different payment processors, so many giving platforms. Some are focused on crowdfunding; others are focused on peer-to-peer. Some on online one-time and recurring gifts; others tout the huge advantage of mobile (text) giving. And then there's EFT, ACH, Stripe, PayPal, Apple Pay, Google Pay, Amazon Pay, and where best to fit them all. Some integrate with your donor base, some do not.

There are simply too many options to make a full inventory of them all. They all have pluses and minuses. But before you think about spending money to add on an expensive platform, take a step back:

- Evaluate what you can do with the online giving platform you have now.
- Evaluate what you can do with the donor base you have now.

Maybe when you first implemented the above, recurring gifts were not at the forefront of your mind. Now, since you're reading this book, they're probably on the top of your list.

In the chapter *Find The Right Tools* I will share a more elaborate way to evaluate your tools and how they best fit.

What you have in place now may not be wrong at all. You may just have to take another look at the tools you already have to make them better. Monthly giving does not have to be expensive, and it certainly does not require expensive platforms to make it happen.

The cost per monthly donor will vary widely between the channel you're using. 🌿



*You and your project are going through a process.  
And the best way to get through a process  
is simply to stop talking and start doing.*

– Jeffrey A. Barnes, *The Wisdom of Walt*

## PART III



### PREPARE FOR SUCCESS

By now, I hope you're convinced that monthly giving is a must-do for your organization. What do you need to do next, so you're ready to start growing?

What do you need to put in place? What options and channels do you have? Then, what do these monthly donors need to keep them committed—and giving to your organization? Are you “stuck” with small monthly donors, or can you upgrade them to higher levels?

To help, I've identified the following stages in a monthly donor's life.

1. Getting ready to accept the idea of making monthly gifts (Preparation)
2. Becoming a monthly donor (Acquisition)
3. Getting recognition as a monthly donor (Cultivation)
4. Being asked to provide updated credit/debit card information (Retention)
5. Being asked for an extra gift and/or upgrade of the monthly gift and leave the organization in the donors' will (Upgrade).

Every single life stage is important. One cannot work without the other. You can't upgrade if you're not bringing in new monthly donors first. But if you want to make sure that monthly donors can be upgraded, or make that ultimate gift, you **MUST** retain them. And retention starts with cultivation. And all of this starts with preparation.

So, let's take the first step and prepare for success!



Source: Pixabay





## 8. Put Someone In Charge

Seth Godin’s blog always gives me inspiration. Recently, he wrote about the words I hear so much when it comes to monthly giving: “That’s a good idea.”

Seth says: “...after every good idea, there are at least 100 steps of iteration, learning, adjustment, innovation and effort. But not committing to the 100 steps is a waste of a good idea. The effort and investment and evolution made the difference.”

In my experience working with nonprofits, helping them develop their monthly giving programs, it’s often the first step that’s the hardest. It’s not surprising to hear crickets after someone says: “That’s a good idea!”

A few years ago, I created a Monthly Donor Roadmap, consisting of only 18 steps. It describes some of the easy steps you can take to start growing your monthly donor program.

Start with step one: Take charge. Be willing to be the driver and the executor of this great idea. This doesn’t mean you’ll have to do everything, but it’s really crucial to be the best advocate you can be for your monthly donor program.

I can share so many success stories of organizations that have taken that first important step, and then the next after that, and so on. These organizations have successfully generated more monthly donors, and because they see the success, they keep taking those next steps.

Will some things work better than others? Absolutely! Will you make mistakes? Yes, of course. But you will learn from the experience, and you keep taking more steps.

Think about it this way: Just because you fall when you are learning to walk, doesn’t make you stop walking, right?

So, start by putting someone in charge to oversee the program and track the results and successes. Then keep taking the next steps, and you’ll find that your commitment to the **great idea of starting and growing your monthly donor program** may be the best thing you ever did—and you’ll be proud to be in charge of it!



## 9. Make Monthly Giving A Thing

The expression, “Make monthly giving a thing,” came from Cara Schwalbach, a wonderful young fundraiser at an animal charity in Chicago. She shared her amazing story of how she grew from 200 to over 2,000 monthly donors in a few years by literally making monthly giving a *thing*.

You can quickly tell how much she loves monthly giving (like me!) and how committed she is to it. She will tell you, too: “It doesn’t have to take a lot of money or a lot of time. It just requires a focus. A priority.”

This is probably the biggest challenge for many organizations. But it doesn’t have to be. The more you make monthly giving a thing, the more monthly donors you’ll generate.

I get it. You may wear many fundraising hats. You are busy! Perhaps you are in charge of organizing all events. Perhaps you are also writing grants for your organization. Perhaps

you're in charge of all social media.

With live events canceled or going hybrid for the foreseeable future, nonprofits are now trying to learn new peer-to-peer platforms, new ways to offer virtual events while some must learn “old school” channels, like direct mail and tele-fundraising, for fundraising and outreach.

If you can fit in doubling or, better yet, quadrupling your focus on monthly gifts, you'll be in much better shape than ever before—just like Cara has shown.

What does it take to finally make monthly giving a *thing* in your organization?

**Exercise**  I recommend you start by creating at least one day a month, but preferably at least some time each week, to focus on your monthly giving program. What do you think of the Monthly Donor Monday idea? Is that something you can implement for your organization?

## 10. Take Down The Silos

One of the biggest hurdles in growing monthly giving, especially in bigger organizations, is that there are so many different departments. Every department has their own focus.

You may have someone just focused on bringing in new donors. You may have someone just focused on renewal campaigns. Someone for social media. Another person for emails. Another for major gifts and yet another person who is looking at legacy gifts. And on and on.

Each with their own budget and their own accountability and responsibility to bring in a certain amount of money. They don't always talk to each other from their respective “places” or don't know what others are doing. We often call these places silos.

Silos make communication and flexibility to include monthly donor “promotion” opportunities difficult.

**If you want to grow your monthly giving program, you must take down the silos in your organization and make monthly giving a focus for all.**

**Exercise**  Think about your approaches for monthly giving to date. Were there any people, departments, silos, that got in the way? Is there a way you can work together so that everybody gets on the monthly donor growth bandwagon?

Forget who gets the “credit” for the results. **A growing number of monthly donors will benefit everyone within your nonprofit, but especially those you serve.**

If the (monthly donor) fundraiser wants to add an extra button or a note in an email to generate new monthly donors, let's make that happen—no matter who is in charge of the emails.

If the (monthly donor) fundraiser wants to add a special monthly-only form or a toggled option with lower amounts for monthly gifts, let's make that happen—no matter where the website is managed within your organization.

Monthly giving will and should permeate your nonprofit. Silos simply get in the way of really growing to the level you need to grow.

Monthly donors will touch every program and every giving level. Some monthly donors will be part of your mid-level group. Some will even be major donors. Many will leave you in their will.

**This means that every part of your organization needs to be on board with that monthly giving focus.**

One of the best “tricks” to accomplish this is to give monthly giving its own budget line and make everybody responsible to reach that goal, together!

I've heard from several organizations who found that's when they really started growing their program—when it fell in line with that important long-term thinking.

This means every person, every department head or leader, everybody in the departments below them: finance, fundraising, marketing, communications, major gifts, web, systems, IT, analytics, operations, agency, consultant.

No matter which channel, no matter which role they play inside your organization (or externally if outsourced), everybody's goal must be on how best to grow monthly giving for your organization.

Your donors will notice. Your donors will stay longer and give more money to help you execute your great mission. All your hard work will pay off even more, if you can just let go of those silos. Are you ready to bust them yet?



## **11. Join Monthly Donor Programs**

Whenever I talk about monthly giving to a group, in person or via a webinar, I ask how many attendees are monthly donors themselves. Sometimes just a few hands go up, or just a few indicate it in the poll in a webinar.

How can you ask someone to give monthly if you don't know the feeling and the satisfaction it gives, if you're not giving monthly yourself? How can you find out what other organizations are doing?

I recommend you join your own organization's monthly donor program. It doesn't have to be with a huge amount—\$5 or \$10 a month goes a long way.

It's a first step in showing that you are personally committed. And you'll soon find that it gives you that extra boost of confidence and excitement to ask other people. Ask your volunteers. Ask your board members. Ask your donors. Ask often.

I highly recommend that you join other monthly donor programs, too. I donate to more than 40 programs of various sizes. Pick an organization you admire or pick an organization

that's active in your type of mission. Pick both.

What does the organization do? What does it send? How often? What do their emails look like? How do they make you feel? What do you like, and what don't you like? What would you want to try for your organization?

You may not have similar budgets. You may not be able to use the same channels or frequency, but there are some (I call them basic) things every nonprofit should be able to do: a thank-you email and a thank-you letter. Look at what you receive and see if you can do it better.

Joining your own program helps you spread the enthusiasm. Joining other programs provides you with new ideas and confirms what you're already doing right.



Take a few minutes. Go online and join your own program and at least one other today. And invite others to do the same. Create a little library with examples.

I have a huge library with scanned examples and pdfs of emails received over the many years I've been working on and with monthly donor programs.

Every organization is different, but many principles are the same. What can you learn from your own joining experience? What can you learn from others?

## 12. Create A Monthly Donor Name

Organizations often “agonize” about the name for a monthly giving program. Many are holding up the launch because of it. Do yourself a favor: Don't delay. You can always recognize donors with a special name later.

Mind you, I'm not saying the name isn't important. It will help your monthly donors feel part of a community, but don't feel like everything has to be perfect from the get-go.

Before you start thinking about names (and possibly stalling the start of the program), consider this: On your online form, your messaging, email invitations and direct mail invitations, ask the donor to give monthly first. That's key. Your donors want to support you that way.

The name isn't going to persuade them to do it monthly—and if you're agonizing about a possible “tchotchke,” that's typically not going to persuade them either.

You can, however, start recognizing the monthly donor as a [name of program] member in the thank-you message and then in the hard copy thank-you letter and subsequent cultivation and recognition. (You'll read more about this in those chapters.)

So, what's the best way to come up with a name you can live with for many years?



**Exercise**

Organize a short brainstorm session with yourself by simply sitting down and writing down whatever names come to mind.

No name too silly, no name too long or short. Just write or type it out.

Then gather a few people together—for example a staffer, client, donor, volunteer (ideally no more than five)—and tell them: “We’d like to come up with a good name for our loyal monthly donors, a name we can live with for quite a while. Here are a few options I started with.” Then put them on a board and ask people to add some more. Then ask everybody to vote for their top three. Choose one and move on. This should not take more than one hour. Maybe two short sessions.

If you’re really torn, consider sending an email to a few donors and ask them which one of the three names they like best and see what they say. **Then choose one and move on.** You have bigger fish to fry; you must start asking donors to give monthly!

Two names I recommend you steer away from: legacy and society. They’re typically associated with wills, bequests, and major donor groups.

Here are a few names I’ve come across over time, but feel free to add. There are many great ways to recognize your monthly donors. Many of the below can be used in combination with something that fits your mission:

- GEMs (Give Every Month)
- Partners
- Impact Partners
- Monthly donors
- Circle
- Friends
- The Spring™
- Monthly donor Circle
- Daisy Club
- Innkeepers
- The Heart Beat™
- Hope Builders
- One Cup at a time Club
- Ambassadors
- Champions
- Guardians
- Children of...
- Companions
- Sponsors
- Compassionate Champions
- Compassionate GEMs
- Partners in Hope
- Keepers of the Flame
- PAWs Partners in Animal Welfare
- Sustainers

As I mentioned, if you’re really stuck, just **START** generating new monthly donors without a name. You can always recognize them as part of a special group (community) later. Don’t let the name deter you from getting started!

### 13. Visualize Your Goal

One of the questions I always ask during my presentations and webinars is, “How many monthly donors does your organization have, now?”

Then closer to the end of my presentation, I ask the attendees to write down their goals. There’s something “magical” about **writing down your goals**.

Goals for monthly giving don’t have to be very lofty, but they must, of course, be higher than what you have now. So, if you have 10 monthly donors, let’s write down that you want to double them. If you have 50 monthly donors, let’s write down that you’d like to double them, and so on and so forth.

That’s how you grow. Maybe this sounds simplistic, but the reality is that those organizations that write down their goal typically reach it. They’ll work toward it, consciously, and sometimes even subconsciously. So, if you’ve not yet already done so, let’s focus on your goals.

Here are a few helpful hints: If you have 1,000 total donors, it’s not realistic to set a goal of 1,000 monthly donors. But if you know that, on average, nonprofits can convert 10 to 15% of their donors to give monthly, what will your goal look like?

**Exercise**  Take a minute, think about your monthly donor goal for the end of the fiscal year. Write it down, and stick it on your bulletin board, your computer, wherever you keep your goals. Then, by the end of your fiscal year, see how you did.

I dare you! What’s your goal for this year, when it comes to your monthly donors?

### 14. Annualize The Value

What a difference a simple calculation makes. When I ask the question, “How many monthly donors do you have?” fundraisers typically know that number. But when I ask how much their monthly donors are worth; they sometimes struggle to answer. Or they only look at the monthly amounts, which is not that powerful.

That’s why I created the Monthly Donor Annualizer™, downloadable in Excel on the resource page: [www.adirectsolution.com/monthly-giving-made-easy](http://www.adirectsolution.com/monthly-giving-made-easy).

<p><b>Monthly Donor Annualizer™</b></p> <p><i>Enter the Number of Monthly Donors and Average Monthly Gift Amount (right) to calculate your estimated annual revenue.</i></p>	<i>Number of Monthly Donors</i>	100
	<i>Average Monthly Pledge Amount</i>	\$25
	<i>Average Monthly Revenue</i>	\$2,500
	<i>Average Annualized Revenue</i>	\$30,000

Source: Erica Waasdorp, A Direct Solution

Note, this calculator is prepared to be an indicator of the potential for monthly donors using the numbers you’re seeing for your organization. This does not include cost and does not take donor attrition into account.

You can use it in two ways:

1. To calculate the total value of your monthly donors for the year.
2. To calculate the cost to generate a new monthly donor.

Now, you may say: “That’s great, but not all monthly donors stay for a year.” I’ll argue that many of them will stay for at least two years, five years, and many stay much longer than that.

I know some nonprofits that calculate two-year values or five-year values, especially those using more expensive channels to generate new monthly donors.

How much your monthly donors give is a combination of the way your monthly donors were acquired, their initial value, and the efforts you put in to cultivate them, upgrade them, and keep them during the year!

 **Exercise** Plug in the goal you set earlier with the typical average monthly gift and see what you get. Annualizing is a good way to look at the total value and it will help others understand their value even more!



## 15. Think Long-term

Monthly giving is not a one-shot deal. It’s a long game. It’s important that you think long-term, because it’s all about your donor’s life-time value (LTV).

Fact is, those organizations that think long-term and focus on improving donor retention will be better off. I realize that’s not always easy, because it’s so often about getting the short-term revenue in the door. Trust me, I see this all the time.

That’s why you’ll find so many easy and small tweaks you can make to your current communication and fundraising that will help you generate monthly donors without major investment.

Then, once you start building a base, you can invest more time and money on generating more monthly donors. That’s how the “big guys” are able to do it.

Of course, it’s always hard to estimate what your donor’s life-term value is, because it depends upon so many factors and variables:

When did your nonprofit start? How often do you reach out to your donors? How many can you upgrade? How many gifts do you receive on average a year if they only make one-time gifts? How many donors start making mid-level gifts or upgrade to major-gift level? How many donors will leave you in their will? How many new donors do you bring in, and how many lapsed donors can you reactivate? How many monthly donors can you generate? What is your typical donor retention rate? All these elements feed into your donor’s life-time value.

**Exercise**  Look at your donor base CRM and see if you can run a life-time value report. You may have a dashboard that shows you this information. What do you see?

**HINT**  If your donor base doesn't offer you anything easy, go to the Fundraising Effectiveness Project website, [afpfep.org](http://afpfep.org), and upload a list of donor ID numbers and gift amounts and gift dates, and it will give you a great retention report, free of charge. It's not quite an LTV report, but it will give you a good indication of the health of your donor base.

Then, let's see how you compare. Of course, if you're a relatively new nonprofit, your numbers will be different from those that have been raising money for years.

Fact is, if you can get a donor to go from giving a \$58 average one-time gift a year to \$25 a month and thus \$300 a year, you've immediately improved their life-time value. If that monthly donor then also leaves you in their will with a \$12,000 average bequest, you've again improved their life-time value.

At a recent meeting, I asked the question: "Do you know the lifetime value of one of your first monthly donors?"

One of the attendees told me her astounding answer: \$10,000! Can you just imagine? A small donor who has been giving so much on an ongoing basis!

Here is another example of the tremendous power of monthly donors, which you may see at educational organizations, especially. A donor made a \$10,000,000 gift to their university. Do you know how they started? As a \$5 a month alumnus donor!

One final example of how monthly donors may seem small now, but often make much larger gifts later: they're much more likely to leave you in their will. Monthly giving often leads to the ultimate gift. An animal charity recently saw a \$195,000 bequest from one of their donors who was giving \$7 a month!

What are the takeaways from these examples?

1. The donors could make a difference at an acceptable and affordable level.
2. You as the fundraiser ensured that the donors were thanked and stewarded during their lifetime, so they felt special enough to continue giving monthly.
3. You kept engaging them, so they were willing to make that ultimate legacy gift.

The examples above came from organizations that had had monthly donor programs for a while. If you're just beginning, you may not see the impact...yet. But I guarantee you: if you keep up incorporating monthly gifts wherever you can, you will absolutely see monthly donor lifetime value go up and up, every year! That is crucial for your nonprofit's existence and future and it helps many more people, children, clients, animals, or individuals you serve.



## 16. It's Okay To Repurpose

Often as a fundraiser, you may feel you have to constantly create something “new” to entice and engage your donors.

Wrong! The reality is that donors will not remember as much as we think, especially where so many channels are “touching” our brains; especially if you’re using something on social media only.

Let me put your mind at ease. YES. You can repurpose messages, pictures, videos, testimonials, quotes, and stories and use them across multiple different channels!

If you have created a great story, use it, in social media, email, and even in direct mail. Send a reminder a few days later. That’s totally okay. In fact, it makes the story resonate even more and the results will show it.

I have never heard of donors complaining that you’re sending the same story or that you’re sending the same video via Facebook and email and you’ve repeated it in your e-newsletter a few weeks later.



Go back in your archives and see what you have that’s “timeless” and see how you can best repurpose it. It may fit in any of the approaches to generate new monthly donors. It may fit well for monthly donor cultivation purposes.

You may find you have a video with the founder of your organization, but you think it’s a bit long. Can you make it shorter?

If it’s a good news story, use it and reuse it. If it’s a sad story, use it and reuse it. Just map out your “assets” and see where you can best use them during the year.

I hear so often that fundraisers created something great for social media, but then they’re not sending it out via email. You’re missing all those people who are not on social media or are on it minimally. Trust me.

You have my permission. Repurpose what you have for whatever purpose you think it fits best; for monthly donor acquisition, cultivation or even retention and upgrades. One less thing to worry about!



## 17. Find The Right Tools

I often receive questions from fundraisers about the best tools to use to process monthly gifts. I also receive emails from vendor partners offering me the latest and greatest on monthly gift payment processing tools.

Here's a breakdown of what I've learned so far:

- Some require contracts. Others do not. Some say they waive fees for the first month. Others give money back. Some say they only charge \$0.50 per transaction and no other fees. Some charge steep monthly fees. Some are much more affordable.
- Some require Stripe, Authorize.net, IATS, Worldpay, Globalpay, etc.
- Some offer credit cards and EFT/ACH/direct debits. Some include PayPal, Apple Pay, Google Pay, etc.
- Some feed gifts right into your donor base.
- Some allow you to change the amount for monthly gifts if you toggle the form between one-time and monthly gifts. Others do not.
- Some use artificial intelligence to come up with the best ask amounts.
- Some look easy to use. Others look more complicated.
- Some have great reports. Others, not so much.
- Some create a quick thank you message on a landing page and send monthly email receipts. Others make it more customizable, so you can do more than that.
- Some offer weekly, quarterly, monthly, or annual options. Others offer only monthly options.
- Some offer the donor the option to pay for processing fees. Others do not.
- Some require customization and in-house staff. Others are easy to create.
- Some require the donor to give their phone number. Others have a lot of “standard” stuff on top of the form. All require the email address. Some allow for some text on top of the form. Others “sit” on the website, and you can provide some copy around it.
- Some have email support only. Others have phone support, some both.



Monthly tends to generate the most money.

In other words, it's all over the map. The tools keep changing and evolving. And there's not one solution for everybody. Because every organization is different, your technology solutions need to fit your nonprofit. And those solutions must reflect where you are now—and where you want to be.

BUT, before you abandon your current processor and jump to the next latest and greatest tool, do yourself a favor and ask yourself a few key questions.



**Exercise**

Look at the list on the previous page. What's important to you? What is happening now in your organization? What are the results you get with your current tools? What do you like about what you're using now? What don't you like? What do your donors like or do not like? Can you track your form abandonment rate?

Then look at these questions, write down the answers, and then start the research:

1. Who is the decision-maker on evaluating options for a new payment processor/online system? Make sure everybody who needs to be in the decision process is involved. You don't want finance to make a decision without you as the fundraiser involved, right? You wouldn't want IT or communications to make this decision without you as the fundraiser, right? Or worse, a board member? Create the evaluation team. Make sure that whoever is part of this team understands fundraising and donors.
2. How many monthly donors do you have now? How have they come in? What does your system do now?
3. Which donor base CRM are you using, and are the online payment processes integrated? In other words, when the donor goes online, does the gift feed into the database in an easy manner, without manual entry? Can you do manual entries if a gift comes in offline? How important is this? If you get 250 online donations a year, the automatic feeding in may be nice, but it's not crucial. If you receive 2,000 online donations a year, it'll become much more important.
4. Are you using a separate payment processor now?
5. Can you track the number of people who go to the form and leave versus those who complete their gift? This is an indicator of how complicated the form is. What information are you asking for?
6. Can you create as many forms as you'd like, so you can track different metrics and you can change ask levels based upon the groups you're looking to reach?
7. What kind of donor information do you need to track?
8. When you send a campaign (e.g., through social media or an email directing the donors to the form), what are the results? How many people open the email, how many click through? How many donors complete the monthly gift? How many donors complete the one-time gift?
9. Do you get any feedback from donors about how hard or easy it is to donate?
10. What is the built-in process for when a monthly donor's payments don't come in?



Check out [www.nextafter.com](http://www.nextafter.com) and their tremendous research on all of this.

11. Do you have a contract with your payment processor, and does it say who owns your data? Can they provide a secure backup on a regular basis so you can access your data, just in case?
12. If you wanted to move away from your current processor (or your processor goes out of business), what happens to existing monthly donor data? The last thing you'd want to have happen is that you lose your existing monthly donors. If you don't have a contract with your payment processor now, where does that leave you?
13. If worse comes to worst, can you afford to have two systems while you're transitioning from one to the other?



This is really important for monthly giving!

Note: This is by no means the full list of questions to consider, but they may help you to make a better decision to stay or leave—or decide whether to add in a new solution slowly. Also, it's important to remember that many CRMs have user forums and add improvements all the time, so what may not be there today could be there next month! Start there first.

Tools are important, but you may very well already have the right tools in place. You may have some tools you've not even used. (I see this all the time.)

You also don't want to have too many tools, so the donor gets confused. (Trust me, I see this all the time too!).

Changing systems is not easy and is often not necessary.

But if you really think you must change, do your homework. Because you certainly don't want to go through the process of changing your payment platforms too soon if you don't have to.

But first, you may have to increase the number of opportunities for donors to start giving monthly using the tools you already have in place.



## 18. Decide If You Need A Donor Account

When you evaluate your systems, that question may come up. The answer is: “The jury is still out.” From trends in subscription, we see that younger donors especially like the option to “control” their own account. Others may not be as interested.

As you hopefully know by now, I'm all about making things easy and simple for both monthly donors and organizations.

When I start working with an organization on growing their number of monthly donors, I first look at the online donation forms to see what's already in place.

And that's sometimes where the big *pause* comes. I call it the “stopper,” “the donation preventer,” or the “I'm-not-so-sure-about-making-a-donation-right-now” piece that sits on the donation form.

Here are just a few examples of what this looks like and it's typically located above the amounts.

**Create an Account or Log In**

It's the first thing the donor sees, and it may cause him or her to think. And maybe think twice!

 **Log In to edit a recurring donation**

- “Do I want to create an account right now?”
- “Did I already make an account for this organization? I think I may have.”
- “What the...did I do with the login and password?”
- “Nah, I'm not comfortable creating an account. But I'm not sure if I can donate without that.”
- “Nah, I don't want to spend the time going through that whole process, when it then forces me to create an account. Let me think about this some more.”

So, what just happened? You lost the donor and the donation. Now, most donors are wonderful people, so if they're not comfortable going online, they may call you and make a donation that way anyhow. Or if you have the option of downloading a PDF form to send in with a donation or monthly gift, great!



**HINT** You'll be able to download a form and create your own version in a later chapter.

But, if you can at all get away with *not* having to create an account, that's so much better. You take away that “stopper,” and you allow the donor to fill out their information and hit submit. *Et voila*, now you have a new monthly donor.



**Exercise**

Look at your current system or the tool(s) you're considering. Will it have a donor account option? How many donors start the giving process and never finish? Will you be able to assist the donor if they call or email because they forgot their login information?

Make sure you get information updated if the donor makes the changes within that donor account, so you can address any issues appropriately.



## 19. Track Donor Feedback

Donor feedback can be relevant and helpful and can help you when you need to build a case. It may be investing in a new tool or explaining why your monthly donor program is stalling or why they're not doing what you expect them to do.

Recently, a few different organizations asked me for help in making the case to provide an easier donation-processing experience for their donors. They did not make this request lightly and they realized that an extra investment may be hard to swallow and even harder to “sell” to leadership and the board, especially during difficult times.

That's why it's important to find all the ammunition you need to make the case.

- Have donors reached out and shared how hard it was to complete a donation on your website?
- Have donors called or emailed you and said they had a bad donor experience; they needed to make a correction to a gift, or they wanted a refund?
- When you called donors, did they share that there was a problem with their gift?

Keep track of donor anecdotes like this and make sure you get information about donor comments to begin with. Maybe it needs to come from your volunteers answering the phones. Maybe it comes from those opening the mail.

Can you quantify how many comments you received in the past month or even longer? Check your numbers. How many donors went to your website and then didn't complete their gift? How many donors clicked through to the giving page, but then abandoned it? How many tried making a monthly gift but did not finish it?

Will the new solution improve this? What if you could improve your completion rate by 10% or even 20%? How much money will that equate to on an annual basis?

If your new solution allows your donors to pay for credit card fees, just calculate how much more money you'd be able to use for your mission.

If you can make it easier for donors to make a monthly gift, and if you can offer special monthly gift amounts, that may be worth doing, and your new solution will pay for itself in a few months.

Now combine the donor feedback and some hard numbers and try selling the solution again. It takes money to make money. How could your leadership team and/or board not be persuaded by that?



**HINT** Watch out! One donor complaint should not cause you to want to overhaul your systems completely! But if you keep hearing the same complaints over and over, that means it may be time to revisit your tools. Use donor feedback to your advantage.



## **20. Consider The Fees**

As part of your monthly donor tool evaluation, check if it will allow your donors to pay for the fees. It may be something you can “turn on” later in the process. It may be something your payment provider or donor base provider is still working on. Do not let that deter you.

If you can allow the donors to pay for the fees, that’s a win-win for you, because it means that 100% of the donation will go to support your mission. The latest statistics show that some 70% to 90% of donors are willing to pay for the fees, even for a monthly gift.

One question that comes up often, then: how do you record the gift if the donor pays for the fees? Should you break it out?

The reality is that the donor paid for it all, so the full amount including the fees should be considered a donation. Yes, this will mean that some “weird” amounts are now feeding into your donor base, but there’s nothing you can do about that.

It’s the amount the donor paid and it should be recorded as such.



## **21. Consider Payment Options**

This is where the many payment providers and donor base options differ. Some will offer credit card only. Others will offer credit cards; Electronic Funds Transfer (EFT), also called Automatic Clearing House (ACH); and PayPal. Others have the “newer” payment solutions, like Apple Pay, etc.

It’s really all over the map and it’s constantly changing. I hear about new payment providers and systems all the time. But just because someone says it’s great, doesn’t mean it’s always indeed the greatest (yet).

- Credit and debit card payments are most common in the U.S.
- PayPal is popular with older donors, and you can pay using your credit card. PayPal does have some advantages and disadvantages when it comes to retention and upgrading.
- EFT/ACH, direct debit, eCheck, automatic bank withdrawal, or automatic bank transfer, are becoming more popular. EFT has the highest retention rate, as donors do not change their bank that often (on average every 12 years or so).

For offline monthly donor gifts, some organizations are still offering check statement reminders. Those are still great, even with the lower retention rate, because you can convert check statement donors to giving via credit card or EFT.

If your current system is only able to offer credit card payments now, that’s totally fine! As monthly giving and payments evolve, I’m sure that your systems will evolve as well. Try not to have too many systems to worry about. To keep your life simple, start with what you have, especially if that’s nicely integrated with your donor base.

I expect that as new payment options, such as Google pay, Apple Pay, and Amazon Pay become more popular, they will most likely become part of your online giving options and thus also allow you to offer that for monthly giving.

Venmo is at this stage still only for person-to-person payments. Micro gifts, Amazon Smile, Facebook fundraisers, special micro-gift sites like [www.gopoolit.com](http://www.gopoolit.com) are also starting to become more popular, but you may simply receive a payment and not know who is making those gifts.

And it never hurts to ask. They may wish to include you as part of their Beta test group. If you have the time and interest, that would be a great way to introduce new payment options to your donors and help make “monthly giving history.”



The key is to be in regular communication with your online payment processor and database provider, so you're always on top of the latest updates.

## 22. Consider Ask Amounts

Also called donor handles, gift amounts, ask strings, these are the key ingredients to how you can best help the donor decide which amount to give. The donor “sets the price,” and we fundraisers need to help them set it as high as possible.

Monthly donor amounts ideally should NOT be the same as one-time gift amounts. Asking a donor who just made a \$50 one-time gift for \$50 a month is simply too high. You may get some higher amounts, but that's not typical.

Rather, go for the smallest amount you can get away with, within your system. Then create some amounts, based upon the formula of one third of your one-time gift amounts.

For example, if your typical one-time form asks for \$20, \$50, \$100, \$250, and Other, you may consider \$5 a month, \$10 a month, \$20 a month, \$40 a month, and Other.

From the extensive online giving form research [www.nextafter.com](http://www.nextafter.com) has done, it's best to make sure that the amounts are going up instead of going down. So, start with the lowest amount first.



Every organization is different, so test it.

Choose an amount to give per month

\$10 USD/mo  \$25 USD/mo  \$40 USD/mo

\$100 USD/mo  Other amount

Your \$10.00 monthly donation can give 3 people clean water every year. 100% funds water projects.

Source: Charity: water website

If you can share specific examples, even better. Donors don't know how their gift can make a difference unless you help them understand that. This is where examples help.

Not everybody can use specific (or tangible) gift amounts, so you may need to say something like: just \$0.33 a day, \$0.63 a day, less than a cup of coffee a day, etc.

Make it bite size and palatable. Make it “feel” like it's not going to be a huge commitment. Then lead the donor to the form and let them identify which amount works best for their budget.



Source: ASPCA ad

Every organization is different, so test what works best for you and your donors.

Small is beautiful when it comes to monthly giving. You'll see more examples of this later on in this book.



**Exercise** Look at your current one-time gift ask strings and gift examples. Can you easily translate them into monthly gifts? Can you test amounts on your forms and in your appeals?



## 23. Create A Monthly Donor Only Form

Virtually every payment provider can accommodate a monthly donor only form now. For monthly giving-focused marketing and fundraising purposes, you'll want to make it very clear that the donor is going to make a monthly gift. If you ask them to do so, try not to distract them with one-time giving options.

As discussed in the prior chapter, a monthly donor only form will allow you to show smaller amounts than your one-time gifts.

From testing, the ideal formula appears to be one third of your one-time gifts but always offer the lowest amount you can get away with. Some systems require that to be \$5 a month, others \$10 a month. Include that low amount as the first option and then go up from there.

If you're using specific amounts, and you'll help guide the donor to choose the best way they can make a difference to your organization, that's terrific.

In the previous exercise, you may have come up with some examples of how you can best translate fundraising examples to monthly gifts.

Don't worry too much, but also don't be too greedy. You can always change the amounts later—and you may be able to do some testing with amounts.

If you don't have the number of donors or email names to do so, check out [www.nextafter.com](http://www.nextafter.com) for lots of free research on online giving, forms and amounts. Typically, allowing donors to give at the lowest amount possible works best.

As you become more sophisticated in your program, you can start testing special forms based upon certain target groups, etc., but let's start with creating the monthly only form setup first.



**HINT** Some providers force you to have both one-time and monthly options on one form. Some can toggle between one-time and monthly. Some can prepopulate the monthly gift option.

**UNLESS** you're actively asking for a monthly gift, I do not recommend you pre-tick the monthly gift option on a "general form."

For the best donor experience, and for better monthly donor retention, it is important that the donor is mindful and active in selecting that monthly gift option and confirms this again when they hit the give monthly button.

## 24. Offer A Downloadable Form

Even with so many donors so internet savvy nowadays, not everybody is comfortable going online and hitting the donate button. Some donors want to know where their credit card information is going.

That's why the trust/secure/verified mark is important—and should be there on every online form.

That's also why you may want to create a downloadable form that your donors can print out and mail in. It won't cost you much time and effort to create, but it will help make your donor's life easier.

You can also use a form if you're able to offer EFT/ACH offline, but not online, for example. The donor can include their bank account information, send it to you, and you can process it with your bank.



Exercise

Download the downloadable monthly giving form on the resource page [www.adirectsolution.com/monthly-giving-made-easy](http://www.adirectsolution.com/monthly-giving-made-easy) and customize it for your organization.

## 25. Create A Monthly Donor Info Page

While this is not absolutely essential, I recommend you create a special landing page that explains what monthly giving is and what the benefits of monthly giving are.

Of course, you will always have the link to the monthly donor only page or form you just created.

You can link to this page from your home page. Or, you can link from your Ways to Give page, for example. Because you never quite know how donors will come to your website and how they'll check out ways to support you, it's a good idea to have a page that explains the program.

Here (right) is a very simple example but it says it all.

Your monthly donor info page can have some monthly donor testimonials. It can include monthly gift examples. Plus, the page should ideally



Home Homeless Support GABR Events Memorials Shop About Us Contact Us

### BASSET FRIENDS FOREVER

*Guardian Angel Basset Rescue is, in most cases, the last option for a Basset Hound in need. There is nowhere else for the dog to go.*

When GABR comes to the aid of a Basset Hound, it is **BECAUSE OF YOU!** As a supporter and donor, this is your rescue. With your continued support, GABR will continue to rescue Bassetts in need. YOU make it possible.

Please consider becoming a monthly donor as a member of Basset Friends Forever. Your commitment to BFF will spell a wonderful future for GABR and for the Bassetts that continue to come to us when they have **NO OTHER PLACE TO GO.** And please consider using your checking account for your monthly contribution. By using that account instead of your credit card, you're helping us **reduce our costs by 75%.**



Join BFF

Source: Guardian Angel Basset Rescue website

offer a contact person and phone number and email address, so if a donor is looking for information about monthly giving, or would like to make changes to their monthly gift, they can find that here.

The decision to add something special, like a testimonial, a special story or examples of amounts also depends on how your website is organized and how it flows.



## 26. Add A Nudge Or Social Proof

Donors love hearing from other donors. Some donors do not want to be the first to try something new. But they can be “persuaded” to do so if someone else has paved the way.

That’s where a little “nudge” and “social proof” comes in.

You often see this social proof used on or near the monthly donor ask on the form, but you can also use it in your emails, social media, website, etc. It can come in the form of a donor testimonial, or it can be a simple sentence.

Sometimes it’s as easy as referring to the gift you’d like most donors to make as “most popular.” It can be a push for donors to give monthly and sit on the one time gift page. It can also be a little motivator to hop on the bandwagon and join a group of special supporters. It can say something like: “100 supporters are already giving monthly. Will you join them?”

In my experience, nothing beats a live donor testimonial, but a nudge and social proof certainly does not hurt. And if you look at direct mail fundraising, this includes things like the little circled amount on the reply form, with “this gift will really help” or “this amount will really help more” written in.

Here is an example of social proof.

*You are joining a loyal group of monthly donors committed to saving children with cancer and other life-threatening diseases.* Source: St. Jude Children’s Research Hospital website

And below is an example of a little nudge.

A screenshot of a donation form titled "WOULD YOU LIKE TO MAKE A ONE-TIME DONATION OR A MONTHLY GIFT?". It features two radio button options. The first option is "I'd like to make a one-time gift." with an unselected radio button. The second option is "I'd like to give monthly. Gifts will be charged automatically each month to the credit card you provide in the amount selected below." with a selected radio button. Below the options, there is a handwritten-style note: "A monthly gift stretches even further to nourish your homebound elderly neighbors".

WOULD YOU LIKE TO MAKE A ONE-TIME DONATION OR A MONTHLY GIFT?

I'd like to make a one-time gift.

I'd like to give monthly. Gifts will be charged automatically each month to the credit card you provide in the amount selected below.

↪ A monthly gift stretches even further to nourish your homebound elderly neighbors

Source: Citymeals on Wheels website

The final example is a pop-up of a request for a monthly gift, just after the donor made a one-time gift through a so-called lightbox (or modal).

If the donor says yes, the monthly gift is processed, otherwise, it will just charge the one-time gift.

Source: Defenders of Wildlife

### Thank You!

Before we process your gift, would you consider making it go even further? Through an automatic monthly donation, you'll help ensure a brighter future for the wildlife you cherish year round.

**YES! Please Process My Monthly Gift of \$20!**

[Edit Amount](#)

You can change your gift at anytime.  
No thanks, complete my one-time \$50 gift.

**Exercise**  Think about examples of nudges or social proof you can use in your messaging. Can you add one to your monthly donor page? Can you add it to your emails? Then see what happens.

## 27. Test Forms Before Going Live

Often a small change can make a huge difference when it comes to donations and monthly gifts. Every organization is different, so what works for one doesn't necessarily work for another. That's why you should always test new things.

I see many nonprofits do just that, but then they forget to test the form for completion.

Yes, I realize you're excited, when you've spent all this time finding the right pictures, the right amounts to ask for, the right look and feel of your form and how it fits with your website, etc.

You're ready to roll, just before the deadline, right? But do yourself a favor and take just a few more minutes and test your form.



**Case Study**

### Form Test Uncovered Unplanned End Date

I recently experienced firsthand how important testing forms is. Whenever I start working with a new client, I make a monthly gift to see what it's doing.

When I did this recently, the form worked just fine, but when I received the confirmation, it told me this was for three months. Wait, what? I didn't sign up just for three months.

When I checked with the organization, an end date was turned on in the backend. Of course, it was immediately turned off, but the fundraiser now had to contact the donors who had already signed up to ask them to opt into a new form without an end date or ask donors for permission to update the form for them.

Fortunately, the organization caught it early. But had they tested the forms before going live, they would have seen the confirmation email earlier.

So always test your forms, and make sure your confirmation emails, landing page etc., are all saying exactly what you want them to say. Then make sure that the information from your forms feeds into your database the correct way. Take an extra half hour before going live and test your form(s). You'll prevent a lot of trouble later.



## 28. Review And Write Down Your Processes

Here's something I hear often: "I'm frustrated because my marketing or communications department controls the website, and I can't make the changes I need to make so this program will grow more."

Most nonprofits already have the systems in place to handle online and offline donations. But...sadly, in many cases they may have been chosen by communications, marketing, or perhaps even IT/systems people—or finance or accounting folks.

Sometimes fundraisers were not involved...or barely. You may feel "stuck." Especially right now. Because nobody is going to change these systems any time soon. It may not be something you can control right now, but that is probably okay.

However, you CAN control the approach—and share the results and that may make your monthly giving program become more important and influential!

So how do you use what you have and still grow your online giving and your monthly donor program? I recommend you trust your systems, but verify how they work and write down the processes.

Process matters. Poor process can sink excellent fundraising. This may sound "basic" but start by verifying what's happening now. Pretend you're a donor for a minute. Or ask someone outside of the organization to make a one-time gift and a monthly gift. This will provide you with valuable input and feedback.

Begin with the one-time gift.

- When a donor goes online to make a gift, what do they see?
- What are the amounts?
- What happens when they click the button?
- Can the donor pay for the processing fees?
- What do the thank you landing page and thank you email look like?
- Can the donor choose to make a monthly gift on this page?

Follow a similar process for a monthly gift.

- Is there a special form for a monthly gift?
- Can the donor toggle to a monthly donor option or do they need to tick the box to make the gift recurring?
- Do the amounts change when you change to recurring?
- Does the donor choose a date for processing or is this done automatically?
- Does the form allow for credit card and EFT/ACH gifts?
- Does the thank you landing page and thank you email change when the donor makes a monthly gift?

Verify what happens after the gift is made. See where the gifts end up.

- How do they feed into your donor base?

- Can you tell if it's a one-time gift or a monthly gift?
- Is there a code associated with it?
- Who gets the notification of a gift and how does that trigger the next stage in the thank you process?

Next, look at some analytics and create some benchmarks for your organization.

- How many donors go to the giving page, but don't complete their gifts?
- How many people pay for the processing fees?
- How are your email appeals doing? Open rates? Click through rates? Donations and monthly gifts?
- How did your past monthly donor appeals do?

Keep the verification and analytics process going because it doesn't end there. Sometimes things fall through the cracks.

I've seen it happen where the first gift is charged, but then something has to be done in the back end to keep charging it, moving forward. If you don't check, guess what, you already lost your monthly donor.

- Check the next month to make sure the monthly gift is charged.
- What does the monthly donor see when the next charge happens?
- What does it say on their credit card or bank statement?
- What does the messaging look like the next month?

Now you have a full inventory of what the donor perceives and receives using the system you have in place.

And I hear you, parts of this may be frustrating and there may be things you'd like to change. But *now* may not be the time to say you want to change your systems.

In my experience, in probably 99% of cases, you can absolutely work with what's there with some simple tweaks. You will not know what those are until you've gone through this process!

So, start with those tweaks and start with things you can control.

It will probably mean setting up a meeting with the marketing, communication, or web folks to see if you can improve what's there now. In some cases, you may even be able to add a user request, and your system will make necessary updates.

1. Take a special look at the amounts showing on the forms. For example, if your one-time forms start with \$50 or \$100 and that doesn't change for monthly, that's simply too high.
2. Now is the time to bring up the need to create a special page with a monthly only option.
3. Plan to ask more often and to offer more opportunities for donors to give monthly. This is the ultimate key to growing your monthly giving program. You'll find many examples in future chapters that are extremely easy to create.

Your objectives are to (1) get everyone in your organization on the same page; (2) help donors inclined to help follow through on their desire to support you; and (3) actively encourage donors to consider an online monthly gift!

Now that you've gone through the testing and verification and you have your processes written down, you can rest assured you know exactly what your system does and what the (monthly) donor experience will be. You've made sure it works to the best of your ability. So...

It's almost time to go live — and go live often! — and reap the rewards.

This means offering your donors as many opportunities as you can to go to your forms; then see what happens.



Please do me a favor. Keep those meetings with your communications and marketing folks going and share results with them often. Chances are they'll get enthused about the results and want to do more. Then everybody wins and your organization will raise even more money!

## 29. Include Finance

I purposely isolated this department (or person) from the overall silo discussion.

While every single colleague and department can be crucial for the success and growth of your monthly donor program, your bookkeeper or internal finance person(s) are often most crucial.

They can really make or break you. So, do yourself a favor and make them a part of your discussions. Involve them in brainstorms on what they need and what you need to ensure monthly donor retention and growth. Determine which reports will make your lives easier.

In some cases, they may be the only person with access to your Stripe account. They may be the only person who can tell you if a payment went through or not.

Sit down with them and find out how they'd like to report on monthly giving. If they're used to major donors and multi-year pledges, it's really important for them to realize that monthly donors are not the same as pledgers. There is NO end date for monthly gifts.

Typically, monthly gifts are recorded when processed and the revenue is counted only when it comes in. If you're looking to do some monthly donor campaigns in May and June and your fiscal year is July through June, you and your finance folks need to realize that only one or maybe two of the monthly payments will count towards your revenue this year.

I recommend having a separate line item for monthly gifts because it's ongoing revenue that comes in. It will also show the “powers that be” how important monthly giving can be and how it grows.

You can also brainstorm with your finance person about the best amounts to ask for.

What do you have in place for other fundraising efforts? How can you translate that to monthly giving and ensure the gifts are unrestricted?

The more involved your finance person is, the more likely you will grow. They're certainly looking forward to generating some sustainable revenue they can count on, but they also need to find it easy to "digest" the information and track the gifts. Everybody wins if you involve them early and often.



### 30. Embrace The Details

If you're looking to grow your monthly donor program, you cannot be afraid of some challenges. If the prior chapters were any indication, a big part of what makes monthly giving grow consists of tools, technology, processes, systems, and analytics.

This is often called "operations." It is part of ensuring that the details are organized and work the way they're supposed to work. It often requires you to get "in the weeds."

While you may wish to only focus on the creative, and mind you, that's very important, what is really going to make or break the growth of your monthly giving program comes down to operations.

It also includes a lot of number crunching. Looking at open and click through rates, response rates, drop-out rates, attrition rates. Number of payments processed and those not processed. Codes. Gifts. Tests. Trends.

Ignoring those payments that didn't go through doesn't magically make the donors come back. The donors did not cancel on you. There is hope to bring them back. But you must be willing to commit and check what's going on with your monthly donor program on a very detailed level.

If you're running a monthly donor program, you must expect that operations and being in the weeds are a major part of your day-to-day activities. Details are part of it. Embrace them. They can be a lot of fun! 🌿



#### Exercise

Pick one day a month to check on the details. Preferably the day after the payments are processed. See how many payments went through. How many did not go through. Then jump to the retention chapters and follow up with the donors in every which way you can. You must do so with all your might! It all starts with details.



*Believe you can and you're halfway there.* – Theodore Roosevelt

# PART IV



## MONTHLY DONOR ACQUISITION



Source: Pixabay



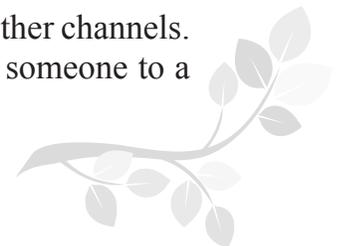
### 31. Acquisition General

When I first started in monthly giving, donating online did not exist. Now some organizations are seeing more than 50 percent of new monthly donors come from digital sources, often driven there by or in combination with direct mail and phone.

In my book *Monthly Giving: The Sleeping Giant* you'll find an overview of all channels used to generate monthly donors:

- Direct mail
- Email
- Organically online
- Tele-fundraising
- Face to face/door to door/street fundraising (canvassing)
- TV
- Radio
- Text giving/mobile phone
- Social media

Channels are not siloed any longer. They often work in conjunction with other channels. A donor can send a text and you can do a follow up call. Or you can direct someone to a



special web page. You can engage someone via social media and send a follow up email. Much of those are quite affordable and they work, typically with prospects and donors you already know.

The more expensive channels like face-to-face, television and tele-fundraising can often bring in new monthly donors who are also entirely new donors to your organizations, so you're growing your overall donor base. The number of organizations that can afford those is relatively small.

That's why for this book, I have focused only on the more affordable resources like email, social media, and direct mail, used by and available to virtually every size of nonprofit.

I've included several case study examples on how easy monthly giving can be. I hope you will start and try at least some of these approaches that follow!



## 32. Use Drip-by-Drip Approach

I am an avid coffee drinker—five cups a day at a minimum and one decaf at night. We have a big coffeemaker with a timer, so our coffee is ready when we wake up in the morning. It's one of those old-fashioned multi-cup machines. The slow drip-by-drip process makes it so worthwhile, and it creates the coffee I like.

It made me think how the drip-by-drip approach is so utterly true when it comes to monthly giving.

We humans are funny at times. We can get so stuck on big problems that we cannot see the forest for the trees.

This seems to happen a lot with monthly giving. Fundraisers can get so stuck on the name, the benefits, the communications, the web, the marketing, the finance, the systems, the resources, the [fill in the blank], that they'd rather do nothing. They simply can't seem to move ahead with monthly giving.

Seth Godin calls it: “stuck on enormity.” He continues: “Start with one thing. **Drip by drip, with commitment.** Those are the two, hard parts. The insight to do it drip by drip and the persistence to commit to it.”

And yet, that is *exactly* what it takes to move your monthly giving program ahead. That is *exactly* what makes monthly giving so successful.

So rather than focus on the problems, start with *one thing*.

You'll find many examples in this section. Start with one giving page. Then add one button. Then add one tick box. Then add one social media post. Then add an ask in a welcome email. Then make a phone call.

You'll see the results, and you'll keep going, trust me.

The drip-by-drip approach will lead to huge monthly giving success if you're committed to it. And you don't even have to be a coffee drinker to make it work! Drip by drip by drip...are you ready to try it?



### **33. Start Small**

One of the most successful approaches to generate new monthly donors is to start with the lowest ask possible.

For most, this means starting at \$5 or \$10 a month, depending on the payment processor being used. I've even seen it as low as \$2 or \$3 a month.

“Wait a minute,” you may say. “That’s way too low! My boss is never going to go for that!”

So here are three important things to remember:

1. **Monthly donors give what they can.**

They want to help, and a small monthly gift may be all they can afford. Remember, even if it’s \$3 a month, that’s \$36 a year. Even if it’s \$10 a month, that’s \$120 a year.

2. **You generate more new monthly donors by starting low, and donors will self-identify with amounts they’re comfortable with.**

The goal is to get donors to give monthly. Just like we see typically with acquiring new donors, low gift asks generate higher responses than high gift asks.

3. **Never snub a donor for giving a lower amount.**

Donors sometimes “test” us as organizations. They want to see what happens. That’s why I recommend you always recognize monthly donors at any level, even if it’s \$1 a month. Don’t worry, you’ll be able to upgrade them to higher levels later.



#### **Nonprofit Asks For \$2 A Month With Huge Success**

A national nonprofit recently shared with me how they were hugely successful with a \$2 a month ask. Once the donor clicked the button in the email, they were taken to a monthly giving form that offered \$2 a month and their typical higher amounts.

What they found was that they generated more monthly donors, and their typical average gift was like what they were used to, when they asked for higher amounts in the past. Very successful test if you ask me.

## 34. Ask Donors Why They Give Monthly

Let's face it--just because you, as a fundraiser, send emails and/or letters to a donor asking them to give monthly, it may not work right away. It might require several appeals and emails. It may require some additional ammunition.

Guess what? If you have at least one monthly donor, you already have some of that ammunition. You have at least one donor who can tell you why they are giving monthly. And you probably have several more. Start there.



Ask your current monthly donors why they are giving monthly, and then use their message to share with potential monthly donors. Get their testimonial. Then use it.

Use it wherever you think it fits best, but by golly, use it! Why? Because donors love hearing from other donors. It may just be that little extra nudge they need to say: “Yes, I feel that way, too. I’m going to start giving monthly because I love this organization and its mission, and I want to help!”

How can you get your monthly donors to share why they support your organization:

- **Call donors to thank them for their ongoing support.** Ask why they give monthly. If they give you a quote or testimonial, ask if it’s okay to use it...with or without their name. Make sure you confirm that via email and preferably with a nice, personal thank-you note.
- **Send an email to your existing monthly donors thanking them for their ongoing support** and ask them what they like about giving monthly. Again, confirm that you have permission to use their quote.
- **Send a personal thank-you note** or include a note with their tax letter. Include a simple index card or reply card asking donors to share why they like giving monthly. Don’t forget the reply envelope, and make sure you ask for their permission to use their quote.

It takes a bit of time but not a lot of money, and it accomplishes three things:

1. Your monthly donors feel appreciated and special, perhaps even honored, because you asked them for their opinion/feedback.
2. You’ll get great testimonials quickly which help reach out to other donors.
3. You’ll generate more monthly donors.

Sounds like another win-win to me.



## 35. Use Your Stories And Your Numbers

This is not a book about storytelling. There are already many wonderful books and even conferences about this. You probably already know how to tell your stories for one-time gift appeals.

You probably also know how stories and numbers are part of every approach. Stories even more so than numbers.

If your fundraising works for one-time gifts, it will most likely also work for monthly gifts. Use your stories. Use your gift examples; just convert them to fit your monthly gifts. A monthly donor will most likely not start out with a big gift (although occasionally that can happen!). Adjust the amounts you're asking for to accommodate.

Simply direct donors to go to the monthly donor only page. Then do it again and again. It's all about repetition.

Good stories need to tug at the heart strings.

Good stories need to explain the need. What will happen if the donor does not help?

Good stories make the donor part of the solution. You can't succeed without him or her. This animal, or this person needs the donor's help. You know what types of stories work best for your organization.

Good stories lead the donor to act right away. You only have one chance before the donor clicks away (if used in an email or on social media). You have a bit longer in direct mail, but still, your time and exposure are limited.

Good stories lead to good ask amounts. The main purpose of ask amounts are to help the donor "set the price." How is that gift going to make a difference to the person, client, or animal?

You'll want to typically ask for just one monthly gift amount instead of multiple amounts in your email. You'll then lead the donor to a donation page with multiple options. The donor will choose the monthly amount he or she is most comfortable with.



Remember, sometimes it's not all about words. Great pictures can tell great stories. Then, test if you can. What works best? Some organizations find that sad stories generate more money than happy stories. For others, it's all about happy ones. Ultimately, it's what works best for your nonprofit! Sometimes it may be a mix of the two...spread out over time.



Source: Pixabay



## 36. Memberships Welcome

If you're a membership organization, YES, you can make monthly giving work for you. Just think about the many public radio and TV-stations who adopted monthly giving very early on.

The huge advantage of monthly gifts for membership organizations is that you no longer need to renew members every year. There is no longer the need for a process that takes multiple efforts and can get very labor- and resource-intensive.

Monthly donors have no end date. They do not need to be renewed. But they can be asked for additional gifts. Monthly giving is a great way to pay for their membership, and you will even raise more money because of it.

### Case Study

### Membership Donors Prime Targets For Monthly Giving

In the U.S., Public Television and Public Radio stations saw the benefits of ongoing, sustained revenue very early on. Of course, they could use in-house TV and radio studios, and viewers were used to so-called on-air pledge drives.

The stations created a mindset early that *no gift is too small*. They knew they were better off with a new member who gives \$5 a month than no member at all. A few things to consider:

- a. New sustaining members received benefits of membership right away, including a premium for joining. No need to wait till members had “paid up” for the year.
- b. New sustaining members gave more money, compared to the membership fee! For example: if a family membership was \$80 a year. Joining at \$8 a month was \$96 a year, so you just increased your amount raised by 20%.
- c. There was no longer a need for expensive renewal mailings, so the organizations saved a lot of money. They came up with the term autorenewal.

Of course, sustaining members already loved their station, but now they were able to support it in a way that was easy, convenient, and within their budget.

So, by giving your members an opportunity to give monthly, you'll not only generate more money from allowing a gift to be spread over the year. But also, you won't have to worry about renewing them, so that's even more money in the bank.

And yes, there may be a few people who stop their commitment early on, so you may have given them benefits even if they didn't complete their first year. But that's less likely—and it's more than offset by the increase in the number of new members you'll generate and keep by offering monthly giving.



## 37. Create Your Plan

The decision to add monthly giving to your annual fundraising plan is probably one of the most important ones you'll ever make. It's probably also one of the best.

Two decades ago, monthly giving was still a costly decision. But now, with the internet, email marketing, social media, and the numerous ways giving has been made easy, adding monthly giving has become a “no brainer.”

It's crucial to realize, though, that monthly giving is not a one-shot deal! If you want to be successful and really grow your number of monthly donors, you must add it to your fundraising plan wherever you possibly can.

Unfortunately, there is no one-size-fits-all plan. Every monthly giving plan is tailor-made, just like every fundraising plan should be tailor-made. So, start with what you already know and what you're already doing in your current plan.



### Take an inventory:

- How many donors do you have?
- How do they break out by recency, frequency, monetary value?
- How many email names do you have?
- Do you have a print newsletter?
- Do you have an online newsletter?
- How many direct mail appeals are you sending a year?
- How many email appeals are you sending a year?
- What are you doing on social media?
- How many people are you reaching?
- Do you have a welcome email series in place for new donors and people who subscribe to your email newsletter?
- Do you call your donors?
- Do you send a thank you letter, and does it include a soft ask for an extra gift?

Based on all of the above, what does your current fundraising plan look like?

Next, look at what you are currently doing for monthly giving. You may be unpleasantly surprised. One of my favorite questions during presentations is to ask: “How often do you ask for a monthly gift?” The answer often is: “Once, or maybe twice, a year. Many times it's even: “Never!”

What if you knew that an email could generate 10 new monthly donors? Wouldn't you want to repeat this? And repeat this again?

Go to the download page [www.adirectsolution.com/monthly-giving-made-easy](http://www.adirectsolution.com/monthly-giving-made-easy) and download the monthly donor planner.

In the next chapters, you will find several very easy ways to generate new monthly

donors. You should be able to add most of these to your fundraising plan, without hurting one time gift results.

Adding monthly giving options doesn't have to cost much. Just a little bit of time and a little bit of persistence. The more you keep at it, the more monthly donors you'll generate, and the more sustainable revenue you'll generate to support your programs and serve your mission.

I dare you to add just one easy thing to each channel. Put it in your plan. Then make sure you do it. What do you have to lose?



### Number Of Sustainers Triples With Focused Approach

Several years ago, a large religious organization in the U.S. had 3% of its donor file enrolled in its branded monthly giving program.

It had an in-house caller and organized two special direct mail appeals a year to try to convert existing donors to sustainers. The organization offered all three options of monthly giving—via check statement reminders, automatic gifts via bank (EFTs/ACH/direct debits), and credit card payments. The retention rate of monthly donors was about 70%.

Since then, the organization has continued to thrive and has grown its sustainer program tremendously.

The organization was focused and worked with a consultant to review all its programs and channels. An immediate decision was made to outsource its sustainer acquisition phone calls to expand the number of donors reached.

The organization tested a welcome package to new donors and a thank you letter to existing donors with an ask for sustainer giving. The group also developed a monthly approach to convert check statement sustainers to automatic bank withdrawal (EFT/ACH).

In addition, as this organization had not done any new donor acquisition in several years, it was willing to feed in new donors to secure further growth.

The results? Not only has this organization quadrupled its number of active donors (those who have given in the past 12 months), it has also tripled the number of monthly donors—now amounting to more than 20% of all active donors, generating more than its 50% of its total annual fundraising revenue.

Because of the conversion to EFT, the implementation of Credit Card Updater, donor care calls, and a consistent effort to prevent lapsed monthly donors and reactivate them on an ongoing basis, sustainer retention rates have grown to above 85% ...and continue to climb.

The organization is totally committed to its monthly donor program. It has successfully offered additional monthly donor programs, online and offline, and continues to work on implementing new ideas.

The organization is very open to testing and trying new things, within reason, which is how it has really moved the needle on their monthly donors. They see the monthly donor power!



## **38. Cost Per Monthly Donor Will Vary**

In the prior chapter we discussed creating a plan to generate new monthly donors.

The next question someone may ask is: “What is the cost per monthly donor? How do I know if I am making money? How much can I expect to spend per monthly donor?”

Unfortunately, I do not have the golden answer for you, as this depends on the variables going into the plan. Which channels you have to work with, and what your current expenses are for those channels, play a major role.

I can tell you that virtually every organization makes money on their monthly donors in the first year, using the approaches described in this book.

If you’re just starting out, and you’re using your website and emails, you can expect to break even in just a few months. While email is affordable, it’s not totally free, of course.

You have to pay monthly fees, depending upon the number of email addresses you have. You may have to pay a copywriter to create the emails for you, or you may be able to do this in-house. Your cost may be \$20 to \$40 per monthly donor. Not bad when you consider that your monthly donor on average will generate \$300 in the first year.

If you’re buying digital ads, that costs money. You may have to pay for creative. You may have to pay for a creative or digital agency to help you. It all depends, but you can expect to pay between \$90 to \$140 per monthly donor—still breaking even in less than half a year.

If you’re sending out an appeal, if you’re making phone calls in-house, or if you have to use an outside agency, there will be an expense associated with that. If you can be very targeted, you may expect to spend between \$70 and \$100 per monthly donor, so again breaking even in less than half a year.

If you use more expensive channels, like Direct Response Television or face-to-face or door-to-door fundraising (canvassing), you can expect to generate higher numbers of monthly donors. But those channels also have a higher cost per monthly donor. The rule here is that the organizations typically still break even in less than two years.



### **Exercise**

If you’ve been generating new monthly donors for a while, look at the cost per monthly donor by channel. Can you do more? How much more can you spend? Use those numbers to feed into your plan. Know your numbers and then build from there.



## 39. Use Your Home Page

If you're serious about growing your monthly donor program, consider a home page "takeover."

Pick one month a year when you expect many people to go to your website. Maybe it's a special holiday. Maybe it's a special giving day. Maybe you just sent out a big donor or new donor acquisition appeal.

Maybe it's shortly after a big event when you know donors will go to your site to check out pictures or look for follow-up items.

No matter what the reason is; if a donor goes to your website, make sure the first thing they see is a message about making a monthly gift. The button should say: "Give Monthly," and it should link to the monthly donor only page you created.

This is the first part of planting the seed! If it's part of an overall monthly donor drive, all the more powerful. The images and story all fit together.

Here is just one example. This starts tugging at the heartstrings right away.



Source: Food for the Poor website

### Exercise

Look at your home page. What would it take to "take it over" and make it focus totally on monthly giving? Maybe it's a slider image and link. Who do you have to talk to, to make it happen—and how soon can it be done? Make sure it's part of your plan.



## 40. Use Email

Generating monthly donors via email was already big, after recent presidential elections, and it has really grown since. During the pandemic, it increased even more.

Email has become an incredible powerhouse for monthly donor acquisition, cultivation, stewardship, retention, upgrading, and extra gifts.

Email can be quick and urgent. It can play into something that just happened. It's newsy. It can be short and sweet. Personal. Long. Engaging. Grateful. Sad. Happy.

Email can have headers, pictures, or just plain text, buttons and/or underlined links. You can include videos. You can use multiple signers. You can send follow-ups to non-opens. You can send targeted emails. You can use email newsletters. You can use both!

Donors are typically more on email than they are on social media. There is literally no end to the flexibility of email fundraising. You may just have to do more.

Some nonprofits only send two emails a month, some send four emails a month, some send two emails a week, some daily. It's all over the map. Those nonprofits that send more emails a week have found that it works. People respond. People sign petitions. People respond to quizzes. People watch videos. People act. People make donations. People attend virtual events. People make monthly recurring gifts.



Look at your email schedule. How often can you add a monthly donor email invite?

If you tell a good story and appeal to donors to help in any way they can, donors will respond, even with a monthly gift!

But you must make it easy for them—provide a direct link to the monthly giving payment option. You must ask them to give monthly. You must invite them to join your special monthly donor community. And if you're really gung-ho about monthly giving, make monthly giving always your first—and even your only—option. I only see a few organizations daring enough to do that. But the fact is, donors still cannot read minds! You must ask them to give. You must ask them to give monthly!



### **Animal Charity Grows Monthly Donors One Email At A Time**

The organization was committed to really growing their monthly donor program. They decided to do one email a month focused on monthly gifts. They used their stories well. The first email generated 11 new monthly donors, the next 6, the next 20 and so on. Every month they generated new monthly donors. Slow but steady wins the race. Can you add one email a month?

Here is just one example of a monthly donor invite email.

**Subject:** Winter is worse than ever for families facing hunger

Can't view this? [Read it online.](#)



**GIVE MONTHLY**

erica,

**The lines at food banks tell a clear story: we are in the midst of a crisis that isn't letting up.** The coming weeks and months are going to be extraordinarily hard for millions of our neighbors. Budgets that were already tight due to the pandemic become nearly impossible with added winter heating costs.

The support of this community has helped us get this far, but the need has not subsided.

**Because the challenge we're facing has been so expansive and will continue to be for an extended time, I'm asking you today to start a monthly gift to Feeding America right now.** [Help us get through the difficult weeks and months ahead – every dollar means more food will be available for people who need it.](#)



**Your neighbors  
need help**

**GIVE MONTHLY**

*Mary, 73, visits the Ephesus Food Pantry in Richmond, VA.*

In the last year, so many in our communities have visited a food bank for the very first time, and millions need our ongoing support to keep food on the table.

**Nearly 1 in every 6 people in America may not be getting enough to eat right now.** Between job losses, school closures and winter heating costs, no one should have to worry about getting enough food on top of everything else.

This problem can't be solved overnight, but I know that together we can make a difference for people who are going to need our help to feed their families.

[Help get food to families by starting a monthly donation before our deadline at midnight this Wednesday.](#)

Thank you for making a commitment to help out during this difficult time,

Source: Feeding America email



## 41. Use Reminder Emails

Email is quick and easy, but not everybody opens their email. On average you can expect open rates of 15 to 20% the first time you send it.

That's why reminder emails to non-opens have become so tremendously popular and successful. Most email programs make it easy to do a resend. You can schedule your reminder when you create your first email. You can decide to include a little reminder message on top. You can do an exact resend. It all depends on what you'd like.

I would not recommend you do it every time. And most organizations typically don't resend their e-newsletters, although you could. I've certainly found that resending works especially well in fundraising emails. If you're like me, you probably receive hundreds of emails a day. You may have missed a message the first time. What's wrong with a gentle reminder? A gentle nudge.

Especially if it really doesn't cost you much more time and effort to create it.



Exercise

Create a reminder email the next time you're planning to send a fundraising email. How are the open and click rates for the first? What are the open and click through rates for the reminder?

Using reminder emails, especially to non-opens, will allow more people to see your email without being annoying. The more people open it, the more people can become monthly donors.

Here is an example of a reminder. Typically it's just a short message on the top and the original email below it.

**Subject:** Don't Wait till Wednesday to be Generous. GivingTuesday is Now!

Dear Erica

I hope you saw my email from this morning. If you've made your gift, thank you! If not, please consider a [Monthly](#) or [One-time](#) gift today.

Source:  
Project  
Open  
Hand



## 42. Use A Welcome Email Series

Virtually all email programs now allow you to set up an automated email series, focused on welcoming new donors and new email subscribers. This typically consists of a three or four email series, spread out over two weeks or so.

Make monthly giving part of that welcome email series. Consider having the third or fourth email focus on asking the donor to give monthly. What do you have to lose by doing this?

Research shows that it's important to get that second gift as soon as possible after a donor first engages with your organization. Let's make that second gift a monthly gift!

Depending upon your type of nonprofit, you may or may not get hordes of new monthly gifts but it's all part of "planting the seeds."

Here is an example of a welcome email.

Subject: A personal invitation for you, erica



Hello, erica, and welcome.

As a member of the Supporter Services team at the International Rescue Committee, I can assure you that giving monthly is the most effective — and easiest — way to support refugees.

That's why I'm reaching out to you — a new donor — to personally

Source: IRC  
welcome  
email

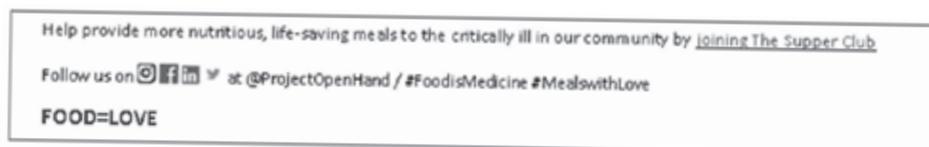
### Exercise

Take a look at your email program and confirm you can create an automated welcome series. Map out a flow for three or four welcome emails for a new email list subscriber and a new donor. What can you use to make them feel extra welcome and extra special? Do you have video? What can you offer for information?

## 43. Use Your Email Signature

This is probably one of the easiest options to create. Every time you send a message to someone, inside or outside of your nonprofit, they'll see your email signature.

Include a one-line promotion about giving monthly and link to the monthly only page.



Source:  
Project Open  
Hand

### Exercise

Create the message for your email signature, set it up in your email account, and start sending.



## 44. Use An Extra Button

The more focused you are on generating monthly donors, the more you'll generate. That's why I'm still surprised how few organizations are asking for monthly gifts—and make it their top priority.

I realize how many organizations struggle with the short-term versus long-term view. And I understand that it's a lot easier to have that long-term view if you already have a good base to work from.

That's why you'll find lots of examples of very small tweaks any size organization can make that will help you get to a base of monthly donors.

Let's start with a really easy one you can try right away. How about adding an extra button with the Give Monthly link to the monthly donor only page in your emails and see what happens?

This one is almost too easy. I bet you wonder: can this be true? YES, an extra button works extremely well. I've successfully seen this done in two different ways.

1. Make the extra button part of the email and include it within the email itself several times. This one is obviously more direct but you still have the one-time gift option as a “backup” included.
2. Add an extra button on the bottom of each email in a slightly different color and a different button text. One button says: “Make a monthly gift” (or “Give Monthly”), the other button says “Donate.”

Here is just one example.



Source:  
Salvation  
Army email



### Exercise

Try adding an extra button in your next fundraising email. Are you generating new monthly donors because of it? Are you seeing a drop in one-time gifts? What happens when you do the same in the reminder to non-opens?

Start with one extra email. What’s the worst that can happen? You get some donations, and you may very well generate some monthly gifts.

Then repeat it and repeat it again. That’s how you grow your fundraising. That’s how you grow your monthly gifts. This is a prime example of the drip-by-drip approach.



### Food Organization Wins Big With Extra Button

A nonprofit helping critically ill neighbors with healthy food had to step up its services considerably—and add many more home deliveries during the pandemic.

To that end they sent several ask emails to their donors to generate extra funds. They also included an extra button in those emails with the request for a monthly gift in addition to an ask for an emergency one-time gift.

They were blown away by the overall results for their emails. Their donors really stepped up with emergency gifts. But the best of all was the fact that they generated more than 40 new monthly donors from the first email, generating thousands of dollars more on an annual basis.

Going forward, this extra button is now part of most of their emails. It did not hurt the one-time response while it added new monthly donors, every time!

## 45. Use A Match Campaign

Here is one of the BEST ways to make a real splash and generate a substantial number of new monthly donors in a very short period. **Using a MATCH literally sets your program on fire!**

A match is a special gift you’ll receive if you reach a certain fundraising goal. A match will help motivate donors to make a donation and it will help motivate prospective monthly donors to click the button: Give Monthly.

You may know a match appeal from Giving Tuesday. You may already do one (or two) as part of your appeals every year. A match is typically provided by a donor or a group of donors (named or anonymous).

Let’s look at an example of the match message.

“If we reach 25 new monthly donors, board member XYZ will give us \$5,000.”

“If we reach 50 new monthly donors, a group of generous donors promised they’ll give us \$20,000.”

There are many variations of amounts and conditions. I’ll discuss a few options here, but it’s absolute key to keep the match and the challenge associated with it as simple and easy for the donor to understand as possible.

Remember that matches are magical. They work in many areas of fundraising, and monthly giving is no exception!

How do you get a match?

You can talk to a (major) donor you know is already going to commit to giving you a substantial gift. You can ask him or her if you can use that gift to reach out to generate sustainable gifts. You can ask your board or a group of donors. You can reach out to a donor with capacity to do more.

They should want to help you grow your organization and your mission with sustainable revenue—because that’s exactly what monthly gifts are.

What donor wouldn’t want to help you grow sustainable revenue for your organization? Here’s what one of my webinar attendees shared:

“We reached out and asked people in our community if they wanted to be a matching donor for the campaign. They all said yes, and the response was amazing.

“At the end of the campaign, we’re thrilled to report we exceeded our expectations for monthly donors and the matching donors’ funds have tripled that income.

“These are funds we can depend on now for the coming year.”

Matches can be done via mail, email, on the air in TV or radio, or as part of a tele-fundraising campaign.

A typical match email campaign consists of three, four, and sometimes more emails, typically sent over a month. Not too long a period of time, and not too short. You want to show the urgency, but you also need to show progress.



For the mail, I recommend you set the deadline for at least 6 weeks after your mail date. Email campaigns can be as short as one day, like you see on Giving Tuesday, although those campaigns now tend to start a few days before the deadline date and tend to extend a day or two after.

Email 1 should be the launch of the match. It has a clear goal. It has a clear deadline. It mentions the amount of the match and how monthly gifts and the extra funds the match provides can make a difference to the clients, children, or animals you serve.

Email 2 is a reminder of the match with an update, usually with a message of: “We’re this close, we only need to find XX more monthly donors. Will you help?”

Email 3 is another reminder, usually a day before the deadline, with another update. For some, this is the final push. In other cases, there’s one more reminder.

If need be, you can do a 4th email. This can be done on the same day: “It’s not too late. There’s still time to help reach XX new monthly donors by midnight!”

You can add in time clocks, thermometers, etc. There is no end to what you can creatively do with a match! The amounts used also tend to be all over the map. Amounts can be very small, like \$5,000. Of course, the story must focus on how the donor will help the individual, client, or animal you serve even more—with a monthly gift.

Here is just one example of part of a match email series.

Dear Erica,

2021 is only a few weeks old and it's already filled with uncertainty. But one thing is certain: an unprecedented number of hungry kids need help.

Just twelve months ago, we were celebrating steady progress toward ending childhood hunger once and for all. But because of the pandemic, **It's as bad as we've seen in a generation.**

That's why I am asking you to become a monthly donor today. When you do, the Arby's Foundation will donate an extra \$50 to help feed even more hungry kids, up to \$50,000!

Dear Erica,

Today I am filled with both sadness and hope. Sadness at the explosion of childhood hunger that we're facing. But also hope at the outpouring of determination and can-do spirit on behalf of our nation's hungry kids.

And today I am inviting you to add to the hope side of the equation, by joining the ranks of our monthly supporters.

Become a monthly donor today and the Arby's Foundation will donate an extra \$50 to feed hungry kids, up to \$50,000.

Dear Erica,

As someone who cares deeply about making sure kids in America don't miss meals, you know that **one person, one gift**, has the power to make a difference.

**Now imagine what a wonderful difference one gift each month can make for hungry kids!**

When you become a monthly donor, you'll provide exactly the kind of stable, consistent support we need to help hungry kids month after month. Especially now, when 1 in 4 kids is at risk for hunger in America because of the coronavirus.

Before the pandemic, we — people like you and me — helped reduce childhood hunger by a third, and we can do it again. When you become a monthly donor by February 28, the Arby's Foundation will donate an extra \$50, up to \$50,000, so your impact will go even further.

Source: No Kid Hungry (Share Our Strength) emails

Exercise 

Does your organization use matches now in your fundraising? If so, what's the typical amount? Can you find someone willing to offer a match aimed at generating new monthly donors?

I mentioned there are multiple options when it comes to monthly gift matches.

- Some matching gift donors promise to match the first gift up to a certain amount.
- Others promise to match the whole year of monthly gifts!
- Others are based upon reaching a certain number of monthly donors.

I've found that using the goal of a specific number of monthly donors to be reached is usually easiest to understand. But sometimes matching gift donors have conditions.

If you follow the multi-email approach, keep up the urgency. Keep the donor up to date on your goal. Focus on the reward—the impact on the children, clients, or animals you help, and you'll do alright.

Fundraising matches are truly magical. So, use a match to your advantage. “Light the match” and feed more monthly donors into your program.

You may be wondering if you need a freebie, or tchotchke to new monthly donors who have come in from a match. The answer is: you typically don't have to worry about offering anything to persuade the donor to give monthly; the match does all of that for you.

The match acts as that extra “carrot” that will benefit your cause and donors— even those who already support you now will be extra motivated to make the switch and become monthly donors.



### **Organization Doubles Its Monthly Donor Goal With Match**

A small children's welfare organization wanted to increase their number of monthly donors. The director of development talked to the board and one board member agreed to provide a \$5,000 match.

They set a reasonable goal of 25 new monthly donors to be reached after a one-month campaign aimed first at its extensive number of volunteers.

They sent two emails, almost 3 weeks apart. The launch email and then a follow up reminder two days before the deadline of the match.

These two emails alone generated 38 new monthly donors out of the gate. They surpassed their goal, and they received an additional \$5,000 to boot. SCORE!

## **46. Use (Video) Testimonials**

In the Recognition and Cultivation chapter, you'll find that I recommend you contact new monthly donors right away. First to say thank you. Second to find out why your monthly donor is giving that way.

Then ask if you can use their answer to reach out to other potential monthly donors. Most will be delighted to say yes. Donors love hearing from other donors, and monthly giving is no exception.

Ask if you can schedule a video call—or if it’s possible to meet them in person, then use your smart phone to record their message.

If for some reason you cannot reach your monthly donor by phone, feel free to send a little note with a comment card and a reply envelope.

Make sure you get permission to use the video, audio, (or print) testimonial, and then use it wherever it fits best. Website or emails work great! Social media works great!

Here is an example of a video email.



Dear Erica,

If you watched Johanna’s video, you can see for yourself how your support comes full circle!

And the great news is that Johanna, a StandUp for Kids youth herself, has started giving back through advisory board membership.

***Will you join our Circle of Monthly Supporters and become a Champion for Youth today with a monthly gift?***

Source:  
StandUpforKids  
email



## Youth Organization Breaks Through First 100 Monthly Donors

A few years ago, I started working with a small youth organization. They started out with 32 monthly donors. We created a plan and created a summer campaign with a small match. The campaign consisted of 3 emails with a deadline of one month after the first was sent. Within the first month, they got to 50 monthly donors.

Then in January of the following year, they invited some existing monthly donors to provide a video testimonial. They sent an email with a short video every two weeks, and with these consistent efforts, along with buttons in their emails and e-newsletters, they broke their first 100 monthly donors a few months later, generating some \$45,000 a year! Wow! Congratulations! The power of donor video testimonials was huge!



## 47. Use A Tick Box On Appeal Reply Forms

Over the past few years, adding a tick box to appeal reply forms has become a great best practice. It's cheap and non-invasive. You'll not get oodles and oodles of monthly donors right away, but you may be able to generate a few every time you send an appeal—at no extra cost. It's also a great way to “plant the seeds” about monthly giving. It's just one part of building your monthly donor community.

I've tested this several times. And in those tests, the tick box typically did NOT negatively impact the one-time gifts. So, if you don't include this tick box yet, now's a great time to test it.

I literally have hundreds of samples scanned in, so there are many variations. The more active you are in generating new monthly donors, the more prominent you should try to “sell” it. Here is what a reply form with a tick box might look like:

If for some reason you're not totally ready to put the tick box on the front, consider showing a small tick box on the back of the reply form, so it's only visible to the donor if they complete their credit card information on the back of the form. It's typically as simple as the below.

**YOUR GIFT DOUBLES TO SAVE TWICE AS MANY LIVES**

**Yes, I'll provide lifesaving surgery and medical care for suffering children and adults.**

**RESPOND BY NOVEMBER**  
2ND to DOUBLE your impact

I'm enclosing:

- \$15, which doubles in impact to \$30**
- \$25, which doubles in impact to \$50**
- \$40, which doubles in impact to \$80**
- \$ \_\_\_\_\_, which doubles in impact
- I'd like to become a monthly giver. (See reverse)**

**Thank you!** Your gift is tax deductible as allowed by the law. To give by credit card, or to pledge a monthly gift, please see reverse side.

My email address: \_\_\_\_\_

Source: Mercy Ships appeal

The more specific you can be, the better. Just like on an online donation form, you can give the donor a little extra nudge. Here is an example of the monthly gift option and the name of the community on the back of the reply form.

**THANK YOU!**

**Please charge my contribution to my:**

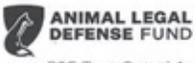
Mastercard  Visa  Discover  American Express

Card Number: \_\_\_\_\_

Exp. Date: \_\_\_\_\_ CVV Code: \_\_\_\_\_ Amount: \$ \_\_\_\_\_

Signature: \_\_\_\_\_

Phone Number (Optional): \_\_\_\_\_



**ANIMAL LEGAL DEFENSE FUND**  
525 East Cotati Avenue  
Cotati, CA 94931






**Be a Partner in Protection!**

Take your commitment to animal protection to the next level by making a monthly gift today!

I would like to make my gift monthly! Beginning next month, I authorize Animal Legal Defense Fund to charge the following amount each month to my credit card:

\$ \_\_\_\_\_

Printed on recycled paper

Source: Animal Legal Defense Fund appeal

### But wait, it gets better and better.

Some nonprofits have gone one step further: They offer the monthly giver tick box on the front, and then add the credit card and EFT option on the back of the form. That's the best of all worlds!

You will only generate new EFT monthly donors when you ask. (Of course, this presumes you're able to manage EFT gifts.)

Credit Card Giving - Monthly or One Time	Giving Monthly From My Bank Account
<input type="checkbox"/> Automatic Monthly Gift <input type="checkbox"/> One-Time Gift <input type="checkbox"/> Amount \$ _____ <input type="checkbox"/> VISA <input type="checkbox"/> MasterCard <input type="checkbox"/> American Express <input type="checkbox"/> Discover	I authorize my bank to transfer \$ _____ each month to Mercy Ships.
Card Number _____ Exp. Date MM/YY _____ CVV# _____ Name as on Card _____ Phone _____	<input type="checkbox"/> I've included a voided check from my bank account. <input type="checkbox"/> I've signed below to authorize the transaction.
Authorization Signature _____	Authorization Signature _____

Source: Mercy Ships appeal

However, very few are daring enough to ask for a monthly gift very prominently on the reply form. See below. This also includes that extra nudge.

Dear Hank,

**YES!** I received my Commemorative Air Force® (CAF) 2021 Calendar and want to continue my support to preserve and pass on these important lessons from our military aviation history.

Enclosed is my gift of:

\$38                       \$29                       \$19                       My Best Gift \$ \_\_\_\_\_

Please make checks payable to: **Commemorative Air Force**

**Please become a monthly supporter to make a tremendous difference in helping us plan ahead to meet the demands of our important work and to "Keep 'em Flying!"**

I would like to charge my contribution to my credit card and have provided the necessary information below:

Please charge my one-time gift of \$ \_\_\_\_\_.

Please charge my monthly gift of \$ \_\_\_\_\_. I understand after my first contribution, monthly donations will be charged the first week of the month.

VISA     MasterCard     Discover     American Express

Name on Card \_\_\_\_\_ Card Number \_\_\_\_\_

Exp. Date \_\_\_\_ / \_\_\_\_ / \_\_\_\_    Signature \_\_\_\_\_    Phone # \_\_\_\_\_

Source: Commemorative Air Force appeal

These are just a few examples of how creative and involved you can be when it comes to monthly giving tick boxes. You can laser them on the front very easily. Why not try it out and see for yourself how this can help you grow your monthly donors?



## 48. Use A Targeted Special Mail Appeal

I've said it before: donors cannot read our minds. You need to ask them to give, and you must ask them to give monthly. While email is terrific, it's also important to look at your direct mail opportunities, especially if they're part of a multi-channel monthly donor drive, part of an integrated campaign.

You need to make it very clear that you really want them to give monthly. I give monthly to about 40 or so organizations for various reasons. Several of them because they asked.

Then why is it that so few organizations are asking? I am an active donor to a hundred or so organizations. I would have expected to receive many more monthly donor appeals by now. But I haven't...yet.

I hope this book will give you a lot more motivation to start asking. Let me share two mail options with you.

**The first option is a hybrid: A one-time ask with the monthly ask prominently built in.** Just think of the example I shared earlier, with the extra button in the email; you can try the same in your appeals.

You typically should not overwhelm donors with too many options, but if you present it in a clear way, donors may very well take you up on the monthly giving option.

You may sacrifice a little in one-time gifts, but if you annualize the revenue for your monthly donors, you'll most likely well make up for it.

How will you know if you don't try?

Probably the most direct and clear approach is this one:

Today, I'm asking for your help to give chicks — and a future free of hunger — to other families like Soriya's.

**Your tax-deductible donation of \$20 or more now will help provide a flock of chicks or other animals, as well as training, to families living in hunger and poverty around the world.**

**Or if you are able — you can give \$10 a month and give six flocks of chicks over the course of a year!**

The eggs your chicks will provide when they are full grown are *only the beginning* of what they can offer a struggling family.

Source: Heifer appeal



### Exercise

Look at the number of appeals you send to your donors. Can you add in a targeted appeal? Especially if you can make it part of a monthly donor drive, using online and offline channels, it will be very powerful.

Now, with laser variations being part of most direct mail appeals, a test costs you virtually nothing, and you may end up with some new, wonderful monthly donors because of it.

Could you step up your monthly donor asks just a little bit more?

**The second option is a special appeal with a request for a monthly gift.** Don't worry, you'll still offer the one-time option but it's almost "hidden." The focus of the appeal is on monthly giving.

Celebrating Animals | Confronting Cruelty  
Worldwide

**HUMANE SOCIETY  
INTERNATIONAL**

1-1054

YES, I WILL JOIN ANIMAL DEFENDERS

To partner with HSI and help save dogs, whales, elephants, lions and all at-risk animals worldwide, here's my first monthly gift of:

\$12/month  
  \$19/month  
  \$25/month  
  Other \$ \_\_\_\_\_/month

Thank you!

HUMANE SOCIETY  
INTERNATIONAL  
1255 23rd Street, NW, Suite 450  
Washington, DC 20037 • hsi.org

Help save animals  
around the world—  
every day of the  
year—by becoming  
an Animal Defender!

Jeff

Please complete your credit card information on the other side.  
Your gift is tax-deductible to the full extent provided by law.  
To sign up online, go to [hsi.org/helpanimals](http://hsi.org/helpanimals) today.

2090 44933349 IUSDH200902004 0

---

...used and mistreated animals everywhere.

Your compassionate support for Humane Society International has helped save literally millions of animals around the world. If it wasn't for kindhearted people like you, they would have no one to defend them.

Because you have been such a faithful friend, I'd like to personally invite you to join a very special group today—our *Animal Defenders*. Members pledge a monthly gift to help confront cruelty, stop abuse and rescue threatened animals from dangerous situations.

If there's anything the COVID-19 outbreak has taught us, it's that we must be prepared to carry on the fight for animals' lives in *all* circumstances. That's why monthly support makes an extraordinary difference—it allows us to budget and plan more effectively, while ensuring we're nimble enough to respond to emergencies too.

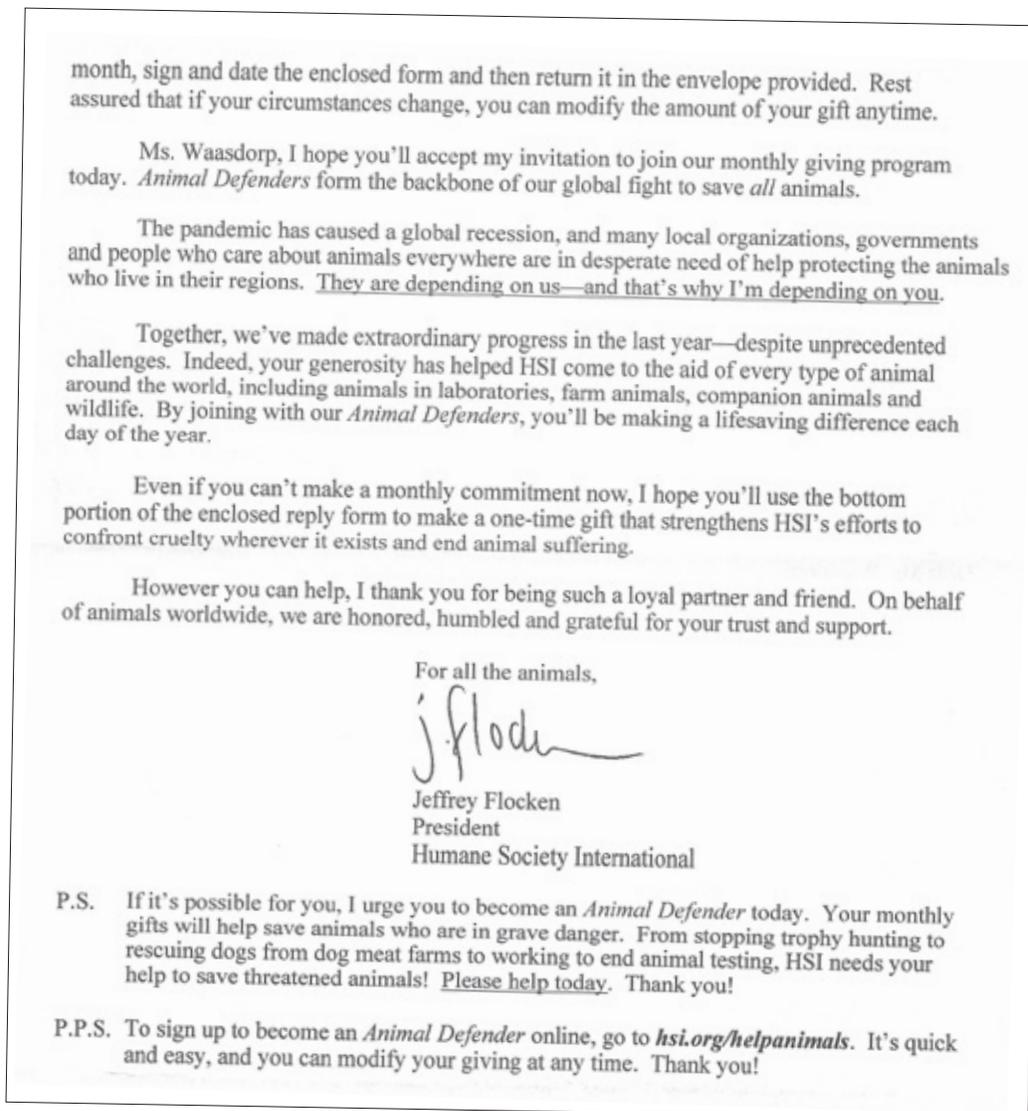
- **\$12** can help protect the African "Big 5"—lions, leopards, elephants, rhinos and Cape buffalo—from ultra-cruel poachers and trophy hunters.
- **\$19** could help rescue severely neglected dogs marked for slaughter on South Korean dog meat farms or snatched off the streets in China. Your support would provide them with lifesaving care and veterinary services, while giving them the opportunity to spend their lives with loving adoptive families.
- **\$25** can provide emergency food, shelter and long-term veterinary services to animals impacted by natural disasters, like the Australian wildfires.

Whatever you can give each month will help save animals around the world now and create a more humane future for all creatures.

**Joining *Animal Defenders* is easy.** Simply decide how much you'd like to give each

(over, please)

Humane Society International - United States  
1255 23rd Street, NW, Suite 450, Washington, DC 20037 • [hsi.org](http://hsi.org)



Source:  
Humane  
Society  
International  
appeal

Targeting is key. I would not recommend you send this appeal to your full donor base.

Rather, I suggest you select just those donors who have given by credit card in the past year—and make them an offer they can't refuse. You can select only those donors who have given two or more times in the past year or in the past six months.

For monthly donor appeals, you do want to offer the one-time gift option. It will help you pay for the appeal.

If you can send an appeal by mail and then follow it up by email, you'll plant even more seeds. You'll read more about this in the integrated campaign chapter.



I'm grateful to those organizations that are testing new things. What are you planning to test as your next monthly donor variation?



## Case Study

### Advocacy Generates New Monthly Donors By Mail

An advocacy nonprofit sent out a test direct mail appeal to 1,100 donors who had given between \$10 and \$100 in the previous 12 months. They generated 18 new monthly donors from this one appeal. They also generated single gifts from those donors who were not yet ready to give monthly. The appeal made money!

The cost to raise a dollar was \$0.07, and the cost to generate a monthly donor was \$51. If you figure that their average monthly donor gives \$154 a year, this was a tremendous return on investment—with the appeal breaking even in the first year.

The organization is now in the process of sending out another direct mail appeal with two follow-up emails to their list. They also include a “Make this a monthly gift” tick box on appeals to start planting the “seeds about sustainers” for other donors. If they keep up this pace, they should be able to get 100 new monthly donors in the first year.

## 49. Use A Targeted Version Of An Appeal

If your organization mails often, there is one more option you can consider. It’s another “hybrid” approach. It’s more than just a tick box, but it’s less than a totally separate appeal. This means you don’t have to add another appeal to the schedule.

Take your typical donor appeal, select those donors you’d like to invite to give monthly, and send them out as a separate segment. You know you’re going to take a hit on one-time gifts from that group, but you’re willing to do that because you’ll also generate new monthly donors to offset that hit.

This version will be focused on a monthly gift, but to help you pay for the appeal, it will have the one-time gift option as a second option as well.

Typically, the targeted appeal and a version of an appeal work best for those donors who made a recent gift. Preferably those who gave in the last 6 months and those who gave multiple times in the past year. I usually recommend starting with those donors who gave less than \$250. And if you only offer the credit card monthly gift option, start with those who gave by credit card.

Segment, test and see what happens.

Finally, if your organization sends thank you letters with a one-time ask, you can try a targeted version of a thank you letter, aimed at just your most recent donors. The sooner you can get a donor to make their second or next gift, the better off you are and a monthly gift ask fits well.

Here is an example of a monthly giving ask in a new donor welcome package.

P.P.S. Did you know that you can provide a steady source of support for the animals through our Angels of Kindness monthly giving program? Become a monthly donor and help us provide care to over 104,000 animals who rely on us each year. Join today by visiting [www.mspca.org/aok](http://www.mspca.org/aok) or by calling Raffaella Torchia at 617 541.5011.

Source: MSPCA new donor welcome pack



## 50. Use A Survey

You know what they say: “Ask for advice, get money.”

A survey is, of course, also an appeal, but I’m listing it separately because it’s a bit more than just a tick box. A survey is an approach that works well for existing donors, as it does two things: it engages donors, and it allows you to ask for a gift when they are most engaged.

In a survey, you’re able to generate responses to different types of gifts, to include legacy gifts and gifts from donor advised funds; and generate interest in higher level gifts—and, of course, monthly gifts. The overall response for surveys tends to be a bit smaller, but you can expect to generate some committed monthly donors because of it.

I’ve seen this used time and again (so it must work for them!) by different types of organizations. What do you have to lose by testing it?

8. If interested in automated recurring gifts, what frequency would best suit you?

Monthly

Quarterly

Annually

Not Applicable

Source: Arbor Day Foundation survey appeal

Also, if you do a survey online, you have the unique opportunity to ask for a monthly gift. See here for an example of the last question.

Thank you for completing our 2021 priorities survey. Your input is valuable and demonstrates why dedicated supporters, like you, invest in our work. Every day, Save the Children’s teams around the world are working tirelessly to deliver the resources vulnerable children need to be healthy, educated and safe from harm – no matter what challenges they’re facing. But none of those lifesaving efforts are possible without the generosity of dedicated supporters like you. Will you invest \$50 or more now to help the world’s most vulnerable children survive hardship and have the chance at a brighter future?

Yes, I’ll give \$50. (What most supporters are giving)

Yes, and I’ll make it monthly! (Recommended to make the biggest impact for children)

No, thank you.

PREV NEXT

Source: Save the Children survey online



Exercise

Look at some of the examples. What types of questions would you like to ask your donors?

## 51. Use An Insert

Especially if your donors are older, they may like receiving hard copy thank you letters in the mail. Those are often followed up by a special welcome package, including some extra information about the organization.

They can also include a special insert or brochure asking for a monthly gift.

This is part of the process of trying to get the second gift from a donor as soon as possible—and monthly gifts are even better.

An insert is very low-key and cheap to produce. It's a very affordable way of planting the message of monthly giving in someone's mind.

Especially in combination with other messages; it all works together to remind the donor about the opportunity to give monthly. And that's what counts.

**Exercise**  Take a look at your activities. What do you mail out to your donors and when? Can you include a buck slip or insert to start letting the donor know about the importance of giving monthly?

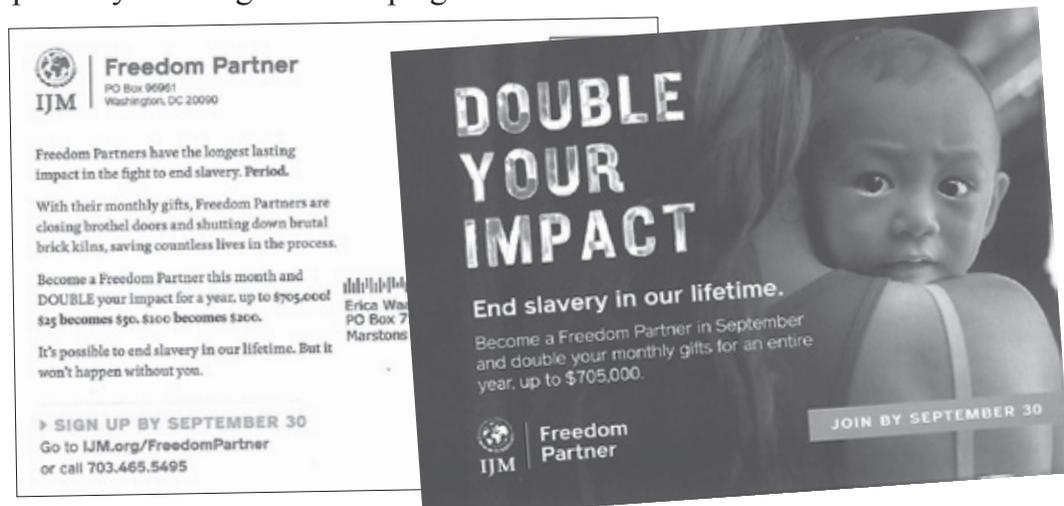
## 52. Use A Postcard

There is literally no end to the number of opportunities you have at your disposal to generate monthly gifts. And it doesn't have to cost an arm and a leg to do it.

Here is just one more example. If you know that your donors are comfortable going online to donate (and who isn't, these days after the pandemic?), try a postcard, driving donors to the web.

Post cards can be printed digitally, so you only pay for the ones you mail. Make it part of an integrated campaign. Combine it with an email and social media push. You can be very targeted. If you know that donors give by credit card, they may be more comfortable going online to sign up for a monthly gift.

Make it part of your integrated campaign.



Source:  
 International  
 Justice Mission  
 post card



## 53. Use The Telephone

As the number of donors without a home phone is increasing and virtually every donor now has a smart phone or cell phone, there are still opportunities to use the telephone to your advantage.

It may be more difficult to make the old fashioned telemarketing approach work for you, because most tele-fundraising agencies are not allowed to call mobile phones without permission—at least not with a predictive dialer, which so many tele-fundraising agencies use.

The reason they use it is because it allows them to call more donors, but it has that awkward silence when you answer. It also allows them to only connect to donors who pick up the phone and bypasses answering machines.

You *can* however manually dial mobile phones, and then when you get a hold of a donor, ask for permission.

In a few pages, you'll read about using text messaging. In some countries, they successfully use text messages first to then get permission to have a live conversation. The options here are endless. It's all about how your donors like to communicate with you.

Some donors still like receiving phone calls. Others never answer their phones, but you can still leave a message. You may be able to send a text message with the option to follow up with a phone call.

You can consider a personalized “robocall” (phone message left in bulk on answering machines), focused on a specific purpose. This is typically a two-step approach. Gauge the donor's interest, and then go for the ask.

For example, you can (1) invite donors to join a special update call. Typically, there's an announcement/invite call. Then, (2) you can schedule another call on the day/time of the “event.” If the donors hit a button, they'll join the call.

It's a little roundabout of a way, but it allows you to access a number of donors at the same time. They can then ask questions. And you can provide updates about your program, build in an ask for support, do a survey, or gauge the donor's interest in having future contact with your organization.

Of course, if you want to manually dial a donor to say thank you, that's always okay. If the donor answers, ask them for permission to contact them from time to time, and record this in your donor database.



Source: Pixabay



## 54. Use Social Media And Video

I am not a social media expert. My background is very much “old school” direct mail, phone, and email. But there are many wonderful social media and digital agencies and consultants who can help you create Google ads, Facebook ads, YouTube ads, retargeted ads, etc.

The opportunities with social media are endless. You are probably already very well-versed in all of this. If you’re posting on social media, you can add monthly giving to the mix.



Source: Pixabay

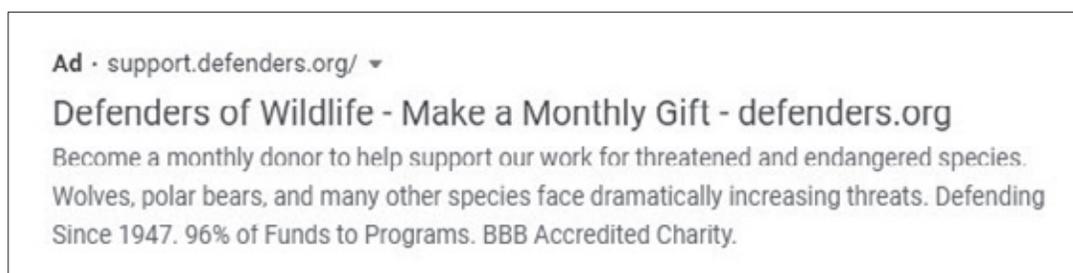


The most important message I’d like to give you, to protect your own sanity, when it comes to monthly giving: Direct people to your own monthly donor only page.

That way it all feeds into one “bucket” and you’re not juggling too many different systems. That way you’re getting the monthly donor’s information, as well, so you can cultivate them and follow up later.

I recommend you use social media as a complementary channel, but if you have a substantial reach and many followers, you can certainly investigate spending money on ads, using some of the approaches in the next few chapters.

If you have a google grant, you can try certain keywords that fit your organization best.



Source: Defenders of Wildlife google ad

Most nonprofits tend to be a bit more successful asking for monthly gifts with a two-step approach, but some have seen great results with direct ads, asking for monthly gifts right away. Those organizations typically have cute or very emotionally-moving images or emotion with great urgency.

In the next few chapters, we’ll take a look at some ways you can implement social media, especially in combination with emails and video.



## 55. Use A One-step Approach

The one-step approach consists of a straight request for monthly gifts. Your success will depend on your mission and the stories you can tell with your pictures.

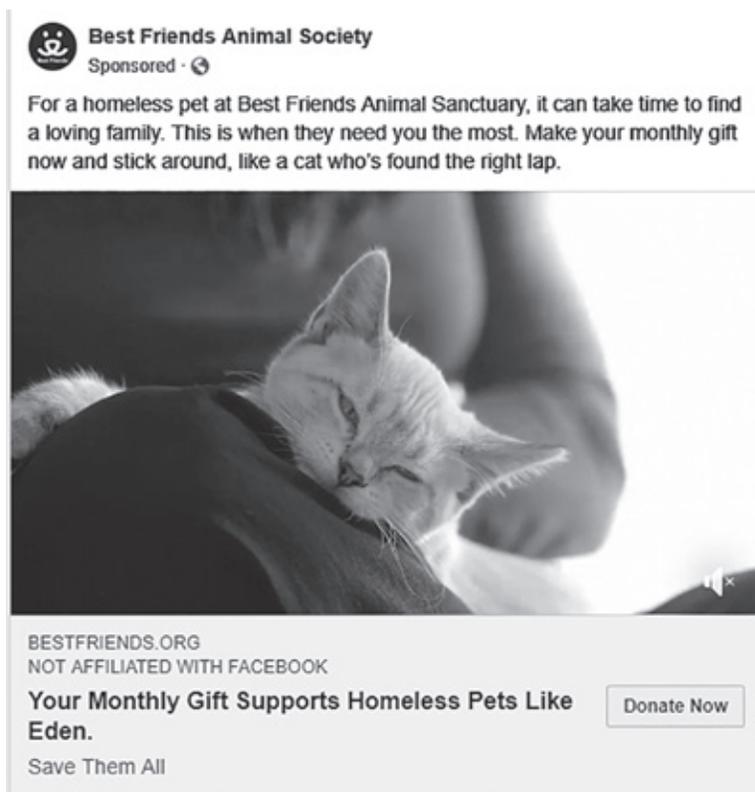
If your organization fits the profile, using a one-step approach can work well with ads, including google ads, Facebook ads, Instagram, Twitter messages, retargeting, focused on giving monthly. You often also see YouTube ad images next to the YouTube video itself.

The ad typically consists of an emotional image and a direct request. Donors will click on these ads directing them to a monthly only page. Below is one example.

Depending upon the cost per click, the number of people reached, and the number who join, you'll be able to calculate the cost per new monthly donor. Then you can compare this channel to other channels.

As mentioned, I am by no means a social media expert and the creation and process of social media ads could take up a whole separate book. On the resource page, I've indicated a few resources that will help you successfully create social media ads.

Not every organization is able to be "emotional" enough to directly convert ad viewers to monthly donors. That's where the two-step approach comes in.



Source: Best Friends, thanks to Julia Campbell



By all means, be open to testing new things via email, if they work in social media, etc. It's all about reaching donors where they are.



## 56. Use A Two-Step Approach

Engaged donors will be more likely to act. More engaged donors will be more likely to give to your organization. That's why two-step approaches tend to lead to more donations and monthly gifts.

The first step typically starts by asking the donor to take some type of action, which means you need to:

- Ask a question.
- Do a quiz.
- Send a survey.
- Ask the donor to sign a petition.
- Ask for one action and get their email address.

Then take the second step. Send a thank you and then make the ask for a monthly gift. That can mean including a request for a monthly gift on the landing page or asking for a monthly gift in the email you send as a follow-up.

I've seen this work really well for many different types of organizations with different missions. You do not have to be an advocacy organization to try this.

There must be some question you can ask that fits with your organization that will prompt people to respond. Ask it. Then, ask for the gift. Better yet, ask for the monthly gift. What do you have to lose by going all out? You have learned something new about the donor. You'll find out what types of questions your donors get most excited about. And of course...repurpose.

What works in social media may also work in email. It's okay to use similar questions in different channels at the same time.

And by all means, provide responses to certain questions back to your donors.

Here is an example of a reply after the donor signed a petition.

**Subject:** Thank you for taking action

Dear Erica,

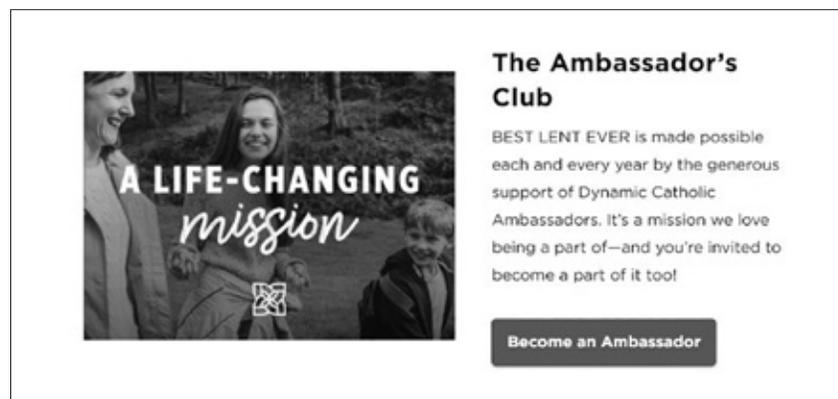
Thank you for speaking out for the animals. Regardless of what new opportunities or challenges arise, our goal is always the same — to Save Them All. By reaching out to elected officials on behalf of animals, you've already done a great deal to help.

Remember, too, that by making a gift to Best Friends Animal Society you can support national adoption and spay/neuter programs, important legislative efforts like the one you took action on today, the nation's largest sanctuary companion animals, and local outreach programs that are critical to saving lives.

[Donate Today >](#)

Source:  
Best Friends  
Animal  
Society  
email

Here is a video in response to a question and the monthly donor sign up below it.



Source: Dynamic Catholic Best Lent Ever daily video series

**Exercise** 

Create a list of questions that may help your donors become more engaged and lead them to act so that you can thank them and follow up with a monthly gift ask in a second step.

## 57. Use Text Messaging

As donors are becoming more comfortable with your organization, they may become very comfortable receiving text messages from you.

Just a few interesting facts and statistics about smart phone use and text messages:

- Americans now check their phones 96 times a day – that’s once every 10 minutes, according to new research by global tech care company Asurion.<sup>1</sup>
- According to a survey by Qualtrics and Accel.<sup>2</sup>, millennials check their phones even more often: **150 times** per day on average.
- The fact is that 95% of texts will be read within 3 minutes of being sent, with the average response time for a text being a mere **90 seconds**. Text messages have a whopping 98% open rate. Text messages have a 209% higher response rate than phone, email, or Facebook.

This comes to show that if you’re not getting the response you’re waiting for, either the person you’ve texted hasn’t yet seen your message or is purposefully avoiding you.

Let me give you a quick recap on the difference between Text to give and Text to donate. Text to give still works well in emergencies, but you don’t necessarily receive the donor’s information. Also, you are limited to specific amounts. The gift will show on the donor’s phone bill.

Here (below-left), is an example of a text to give approach.



Source: Humane Society of the U.S.

In the case of Text to donate (right), you can direct someone to your online giving page and you’ll be able to do much more follow up.



Source: Qgiv text to donate

If you're using a service to send messages, you'll require permission. If you're doing it manually, you don't need to, but I recommend you absolutely get permission. It will help with your open, click, and engagement statistics.

Texting opens the door to lots of great messages. If you look at political candidates and parties, they've really perfected this.

You'll be able to regularly send messages with links to updates, videos, photos. You'll be able to send confirmation emails. You'll be able to use it for engagement and also for retention and even upgrades later on.

Mind you, email and social media do not get replaced by texting, but it's a great way to enhance and confirm your overall communication.

In the U.S. text messaging for fundraising is still in the early stages. You can send a text to a certain number and then make a gift; the gift is paid on your mobile phone bill. Sometimes the organization receives donor information, but sometimes they do not.

You can also text a donation link as a follow-up, if the donor has given you permission to use text messaging. You can ask a donor to take action, and then do the two-step follow up to ask for the monthly gift.

Based upon the number of donors of all ages who are comfortable texting, I expect this channel to keep growing more and more.

In some countries where mobile phones and texting rules are different, it's very common to have someone text a gift, when watching a nonprofit commercial on TV. The donor then receives a confirmation...and next a phone call...which then leads you to a conversation where they can be asked to make a monthly gift.<sup>3</sup>

You see how it's a combination of multiple channels?

Text messaging is great to confirm gifts. Text messaging is great to reactivate monthly gifts. And you'll see more examples in the retention chapters.

Again, it's all about where your donors are, what's possible for channel use, and how you can best reach your donors.

 **Exercise** Are you using text messages now? Are you asking for permission? Take a look at the number of text permissions you have.

1. Source: <https://www.asurion.com/about/press-releases/americans-check-their-phones-96-times-a-day/#:~:text=Americans%20now%20check%20their%20phones,Asurion%20two%20years%20ago1>.  
2. Source: <https://techjury.net/blog/sms-marketing-statistics/#gref>  
3. Source: Peter Muffett, DTV Group, UK





## 59. Create A Monthly Donor Month

An organization I had the pleasure of presenting with a few years ago, organized an integrated campaign focused on their monthly donors every September.

Another organization does the same thing every July, at the beginning of their fiscal year and before the big giving season—so they knew they’d have many monthly donors feeding into the mix by the busy holiday giving months.

Yet another organization has found that January is a great month to start off the calendar year well by going all out.

July or September is early enough in the giving season that it doesn’t detract from activities like virtual galas, Halloween, #GivingTuesday, or year-end giving.

It’s also early enough so that you can recognize your new monthly donors with a year-end appeal and get an extra gift. You can include your new monthly donors in a special Thanksgiving, holiday, or Christmas card—as personalized as possible.

January is great because you can capitalize on the many gifts you received during the busy holiday season.

As you know, there really is no bad time to ask for monthly gifts, but you might wish to ease up a bit in those last two to three months of the year; this way you optimize one-time gifts. Then go back to full-blown monthly in January.

Frankly, I’d love to declare every month Monthly Donor Month, but that may be a bit too aggressive. Let’s start with just one month a year.



Which month works best for you to name Monthly Donor Month?

Let’s take over the homepage. Let’s have every email ask for monthly gifts. Let’s send out a special invitation, followed up by a phone call. Let’s try that integrated campaign. It’s one month where you’re going all out!

What do you have to lose? I can guarantee you’ll generate more monthly donors!

## 60. Create Your Monthly Donor Plan and Stick to It

As I mentioned earlier, every monthly donor program is totally tailormade. Every organization is different in how they've brought in their donors, which channels they're using, how many donors they have, and how many email addresses they have.

Now that you've seen all the options and know your numbers, you can create that custom-made plan. If you're just starting out, it will help you identify the best benchmarks, the open and click through rates—and you can then tweak it for the second year.

Ideally, you'll have a special line item in your budget for monthly gifts, so you can really see the growth over time.



Look at the various ways of generating new monthly donors you just read about. Then look at your communications and fundraising plans. How many appeals do you send out? How many email opportunities? What do you do with social media? What are some of your current open, click through, and response rates?

Download the monthly giving plan on the resource page at [www.adirectsolution.com/monthly-giving-made-easy](http://www.adirectsolution.com/monthly-giving-made-easy) and fill in the blanks.

Plug in your numbers. How many email appeals will you use? Can you use every email newsletter? What can you do in the mail? How many donors can you target?

Then implement that plan for a year and see what happens. How many monthly donors did you generate? How many per appeal? How many per email? How many monthly donors did you generate from your integrated approach? Based on those results, update your plan and implement it for the next year.

You may find that the results are so unexpected that you can do more of one thing and less of another. But do yourself a favor, and stick to it, build on it...and keep building on it. Drip-by-Drip.

## 61. Asking Often Will Result in More Monthly Donors

My favorite part about working with nonprofits is how much we can learn from each other. I learn from questions from fundraisers like you every day.

I am blown away with how smart people at nonprofits are, and how committed they are to the cause. And how many are (fortunately) really committed to growing their monthly gifts, because they see the power!

Recently, a wonderful fundraiser at a nonprofit was gracious enough to spend an hour on the phone with me to tell me about the journey she took to grow her organization's program to 1,000 monthly donors. Let's look at this case study, closely. 🌱



## On the Road to 1,000 Monthly Donors

Like at so many nonprofits, the fundraiser at this animal welfare organization wears multiple hats. She oversees the direct mail and some online giving, Facebook, and some third-party fundraiser programs—and even a mid-level donor caseload.

The monthly donor program is called Fur-Ever Yours, and it had 927 monthly donors, with the goal to reach 1,000 by the end of their calendar year. Its average monthly gift is \$15.

I asked the fundraiser about her biggest success, and her answer was not what you would expect—but it makes a lot of sense. (It ties back to the fact that so many people still do not quite understand the value of monthly giving.)

The organization's biggest success, or monthly donor breakthrough, came when the Fur-Ever Yours budget was separated from other budgets—so people could see how much the program grew exponentially. Monthly donors used to be mixed into the offline and online program; now they had their own line item.

Once the organization saw this growth, it was able to start focusing on monthly giving even more and the organization saw a major jump in the number of monthly donors.

Expenses are still recorded as part of the direct mail program—especially because some of the materials invite Fur-Ever Yours monthly donors to make an extra gift.

Monthly donors receive stewardship materials consisting of:

- Thank-you letter/welcome pack.
- Thank-you call.
- Two newsletters: one has no ask, and one includes an upgrade ask.
- Holiday card with a one-time gift ask.
- One impact report without an ask.

The nonprofit is using multiple strategies to grow the Fur-Ever Yours Monthly Giving Program. A special monthly giving direct mail appeal is done in the spring. A telemarketing campaign focused on monthly giving takes place in the spring and fall. In addition, they do social media ads, directing donors to their website.

Many email appeals have a link to monthly gifts in the P.S., and 75% of direct mail appeals have a P.S about monthly gifts with a tick box on the form.

The most successful approach in acquiring new monthly donors was the “Help us reach 50 new Fur-Ever Yours monthly donors and unlock \$10,000” challenge.

This addressed the many donors who wanted to mail checks to appeals. Many were not ready to make a gift through a credit card or go online to donate. But this challenge helped more donors switch to a monthly gift from their card.

The organization is fortunate to be able to repeat this integrated campaign with a match several times a year. It is truly amazing what this means for the growth of the monthly donor program.

Asking multiple times a year brought them that much closer to their goal of 1,000 monthly donors.



*The manner of giving is worth more than the gift.*

– Pierre Corneille

## PART V



### MONTHLY DONOR RECOGNITION AND CULTIVATION



Source: Pixabay



#### **62. Recognition And Cultivation General**

This is probably one of the most common questions I get whenever I'm presenting a webinar or an in-person session or workshop: "How do I best recognize, thank, cultivate, and retain my monthly donors?"

That's why I put together some common best practices. And what I'm describing here is very easy to implement!

Of course, every organization is different, and you may have some very special things you can do. By all means, keep your creativity coming. Surprises are always great!



By now, you probably know I recommend keeping things simple, doable, and affordable. Monthly donor recognition and cultivation is important, but it must be something you and your organization can commit to for a very long time.

- Don't go crazy, and don't paint yourself into a box.
- Don't promise something you may not always be able to deliver.

For example, instead of promising that the donor will get quarterly newsletters, just promise to send them updates. That way if you get busy or if budgets get cut, you don't have to worry.

How can you make your monthly donors feel special? Use a simple stewardship plan and see where you can make monthly donors fit without too much extra time or money.

Talk to your colleagues and see what they are doing elsewhere. Can you use some of their ideas? Maybe run with what they're doing? For example, if your major gifts officer is doing a town hall event, donor conference call or Zoom call, can your monthly donors participate? Remember one of my favorite words: repurpose!

You don't have to do anything very elaborate. Maybe it's a note from one of your clients. Or an invitation for a (virtual) tour of your organization. Always be on the lookout and just create a swipe file for the year, so you can tap into it as needed.

Here are several very important things to remember:

The more you do in the recognition and cultivation stage, the higher your monthly donor retention. Everything you do here plays a major role in your monthly donor retention process. Sooner is always better.

You've heard me say this before but it's especially important to keep doing it. Test your processes. If your system generates thank you emails and a thank you landing page, make sure you test those first to verify that they look exactly the way you want them to look and has the information the donor needs. You don't want the donor to have questions when they get their first receipt.

Know what your system does. Will it send out automatic receipts every month when the donor's card is charged or will you be able to suppress those and send something else, something warmer and fuzzier, instead? Make sure you stay on top of system updates or new releases. What may have happened before, may not be occurring now and vice versa.

Assign a person who is accountable and feels extremely responsible for the monthly donor program. If you're delegating the stewardship to someone else, make sure you have regular check-ins to verify that the materials go out. Also check about donor feedback.

Create a special flag or selection convention in your database so you can send customized emails—with a special thank you for their monthly gifts—at every opportunity.

It's important to let the donor know that you know that they are giving monthly, no matter which channel you're using. Small things can make a big difference to your monthly donors.

Everything you do should ideally fit in with everything else you're already doing. It's

about realizing that your monthly donors are some of your best donors. If you start off your relationship right with your recognition for when they join, and recognition throughout their lifetime, you can be guaranteed to keep more of your monthly donors.

In the next chapters you'll find a number of examples and approaches you should be able to do—no matter what size organization or how many staff and volunteers you have. Always think of how you can best manage your donor expectations while making them feel special.



### **63. Make Donors Part Of A Community**

I discussed the creation of a monthly donor program name in the preparation section. If you didn't have a name, now's the time to search for one.

...but don't go “nuts” over it. Don't spend months worrying about it. Think of what will make monthly donors feel special and a part of a community.

Remember that the name or the community is not the biggest reason why donors start giving monthly, but it helps you with your recognition and cultivation.

Don't worry too much about making a fancy logo, just use something that's easy to use on a lasered thank you letter, in email thank yous, on your websites, etc. Most organizations simply add the name of the program to their own logo, so it remains very clear which organization the monthly donor is supporting.

Most donors will like pleasant surprises, so if you don't have a program/community name now, you can always share that later. Of course, if you can have your name ready before you start promoting monthly giving, that will make everybody's life easier. I just don't want you holding up the asking because of it.



### **64. Keep Benefits Simple**

You really don't need a lot. Monthly donors give monthly because they want to support you and the clients, individuals, or animals you serve.

They don't typically give monthly because they get something in return (unless you've trained them to do so). Don't hold up the program because you feel you must have an extensive benefits package.

Letting the donor know they'll receive updates and a tax letter in January are already great benefits.

Any type of access you can give donors to see and learn more about your mission is very welcome. In this virtual world, you may be able to think of many low-cost benefits—virtual tours of your facility, for example. Or a townhall session with your CEO or Executive Director is always appreciated.

Over my many years of doing this, I've seen that benefits tend to come and go, so, as long as you focus on the basics and make sure they happen, you'll do alright.

You can always add things later as you develop the program further or if you see something a long-term monthly donor may wish to hear or see.

If you are a membership organization, you probably already have the benefits in place. You just have to start providing those benefits the minute someone starts giving monthly.

Most mission focused organizations really do not need a giveaway, a premium, or a tchotchke for joining unless you have donors who are trained to get something in return for their gift. If that's the case, you're still better off keeping a giveaway affordable, easy, and cheap to ship—and tied to the mission of your organization.



Don't discount your newsletter or a connection to the organization in another way as something you can promise, which can really make monthly donors feel connected with your organization. Keep it simple!



## 65. Think Of Something Surprising

This can be something your major gift department is doing that could work well for this group of committed monthly donors. It could also be something as simple as a card for a special occasion.

A birthday card is special, but you can certainly do a valentine's day card, Easter, Passover, and of course Thanksgiving, Christmas, or Holiday card—depending upon what you know about your monthly donor.

And if your organization has a special meaningful day (for example for environmental organizations, this could be Earth Day), you can send a card to your donors with a special thank you for their ongoing monthly support.

If you receive a moving note from a client, how about scanning it in and popping it into an email or send it in a card? There is no end to surprising things, especially if they're tied to your mission and they're not too expensive to create.



### Nonprofit sends hand cut hearts for Valentine's Day

For the past few years, this nonprofit sent me a simple hand cut heart in a white envelope just before Valentine's day.

They have enough volunteers and students to make this happen every year. It's definitely something I hold on to. Wouldn't you?



Source: Crazy Horse Memorial Foundation



## 66. Send Welcome Letter By Mail

Your online processor will most likely generate a thank you message and thank you email. In the preparation process, you should have already tested it and you should have already verified that it's giving the correct information and is as "warm and fuzzy" as possible.

But that's not enough! If you like to stand out and you want to make the new monthly donor feel extra special, you should take one more step.

This means, even if the donor came in online, send a letter by mail. Even if the donor called in with their monthly gift, send a welcome letter by mail.

In this hard copy, or "offline," thank you letter, indicate the promises you make to those monthly donors. Don't overpromise. Only promise those things you're certain you'll be able to execute, no matter how busy it gets in your office or your organization.

I recommend you let the donor know they can expect to receive updates from you about how their gifts are making a difference. You don't need to be too specific here. I'd rather you keep it vague than promise they'll get quarterly newsletters—if you're not sure you can pull that off.

I also recommend you let the donor know they will NOT receive monthly thank you letters in the mail, but rather one tax letter in January with an overview of all their donations for the calendar year.

Make it easy for the monthly donor to contact you if they have questions. Include your name (or someone you've designated who will work with these monthly donors and is committed to the program) and make sure to include a phone number and an email address. Monthly donors who are engaged, stay, especially if they have a personal connection.

Having a special contact is important, because monthly donors will have questions. Not just about their gifts. They care about the organization.

That's why some nonprofits have introduced a special "concierge." I first heard this word from Vicky Barrett-Putnam of the Sierra Club. A concierge goes even further than just having a person to call. It means having someone available to make monthly donors feel special. Having a personal connection has been proven to prevent drop offs and, thus, increases retention.

Introducing extra recognition and personal attention and a concierge focused on all aspects of monthly giving takes an extra effort, but it will pay off nicely, both in this recognition stage, but especially later in retention.

Some nonprofits go through great lengths to create a special welcome kit. You know your donors best. At first, your best bet is to keep your welcome package simple and affordable, and make sure it goes out within 24 to 48 hours after the monthly donor joined.

You can always expand later. Monthly donors are most interested in updates and how their gifts are making a difference.





## **67. Call Monthly Donor To Say Thank You**

If you, or someone you've assigned to make thank you calls, can talk to the donor live, ask him or her why they're giving monthly.

If you like what you hear, ask the donor if you can use their message to reach out to other potential monthly donors.

Ideally, you'd like to call right away. But if that's not possible, let nothing stop you from calling the monthly donor at some point, just to say hello and to say thank you! Who doesn't like to hear *thank you*?

This is also a good time to find out the donor's birthday or a special day. You can then update your donor base with that information. Trust me, you'll use it!



## **68. Recognize "Hidden" Monthly Donors**

When someone ticks a box or hits the give monthly button, it's very clear what they want to do. We've just described how best to recognize them.

But there may be other types of monthly donors that are not as obvious. I call them "hidden" monthly donors. They will typically come in through a different process, and they may not necessarily consider themselves monthly donors.

But you can still recognize them as such! You can possibly even include them in your total counts. That's really up to you! As long as you realize they'll come in from a different source. You may not even know about them until you do some research.

Once you know where they are "hiding," you can create a recognition and cultivation plan for them. You may have some or all of these:

1. Workplace giving donors.
2. PayPal subscriptions.
3. Donors who set up recurring online bill pay, but you receive their gifts as checks.
4. Donor-advised funds. They're typically \$50 or higher. They could or could not have an end date you don't know about.
5. Facebook Giving monthly donors.
6. Donors who used a monthly gift to pay off their pledges, but they continue after their pledges are fulfilled.
7. Maybe there are others we've not yet identified: new payment options, micro gifts, etc.

If you're gung-ho about growing your monthly donors, it will be very helpful to know how many of these hidden monthly donors you already have, so you can show an even bigger growth.

Let's address a few questions about hidden monthly donors. How do you go about finding them? How do you go about tracking them once you find them? How do you

recognize and cultivate them? How can you get more of them, if that's what you'd like to do? The answers to the above questions may be different by channel.



The best way to find a hidden monthly donor is by running a query from your donor base. You can start by isolating those donors who have made more than two gifts in the past year. Then look at how many made gifts in the same amount, month after month, at about the same time. If you're the one entering the gifts, you'll probably recognize their names quickly. Set up a schedule where you do this cross-check regularly.

Then look at how these donors give. What is their source? Are they coming in online or offline? Is there a letter enclosed (like with a donor-advised fund)? Is it a check or a transfer? Make an inventory of the group. Do they fall in one of the seven categories listed above?

If your monthly donors are not coming in through your website's donation page, or if they come in via the mail, you may not have a record that they want to give monthly. You really cannot code them the same as your other monthly donors, because you don't want those tallies to go off-track.

But depending on how many different categories you find; you can give them a special flag, attribute, or whichever type of special code options your donor base CRM gives you. That way you'll be able to easier select them in future and run reports.

This flag will also help you determine the best approach, when it comes to subsequent, ongoing communication and retention.

For example, just as I recommend breaking out monthly donors by payment type (check versus credit/debit card versus EFT/ACH), it's good to break these hidden monthly donors out by category (e.g., PayPal, donor-advised funds, workplace giving, Facebook giving, etc.). Flags and codes will help you, because then you can sort and select. You can always combine groups, but the less you have to do manually, the better off you are.

I am a strong proponent of recognizing these hidden monthly donors just like other monthly donors and sending them special stewardship reports and updates.

I recommend including your hidden — or should I say recently “discovered” — monthly donors in a welcome as a monthly donor thank-you letter. But be careful when it comes to listing their tax-deductibility or promising a tax receipt in January, because not every giving type will allow that.

The rules are different for groups like workplace giving or donor-advised fund donors. We'll address some of these rules when we discuss the different categories.

Of course, you can never go wrong with a print or email newsletter. It's okay to say thank you for their ongoing monthly support.

Let's take a quick look at some of the different types of hidden monthly donors.

**Workplace giving.** If you have an active United Way organization or you live in an area where companies or government agencies are actively promoting the Combined Federal Campaign, or if there are large companies in your area, donors may be more likely to give through a workplace giving plan and send in small gifts every month to your organization, sent to you as a lump sum.

You may not hear that individual donors are giving that way until they stop. If you do receive an overview of new workplace givers on a regular basis, I definitely recommend sending those donors a thank-you letter; list the name of your monthly donor program and assign a contact email and phone number.

Send them your newsletters and keep them up to date on how their regular gifts are making a difference. Workplace giving donations are tax-deductible within the extent of the law.

**Checks from online bill pay.** I see these very often. You can recognize the donor as a monthly donor, and you could consider them part of your check statement program, if you have one, except there is no need for reminders. Do send them a thank-you letter and ongoing updates, and it's okay to include them in some targeted, extra gift appeals.

Note: Some organizations, especially those with much older donors, started offering monthly giving through check statements years ago. These are very labor intensive, so most only do this if they have the resources or an in-house mail room to organize. They often focus on converting them to EFT/ACH monthly donors later. These donations are tax-deductible within the extent of the law.

Online bill pay checks are not the same, but donors may have set this up themselves when they received an invitation to give monthly. You will not know they have done so until you check your donor base.

**Donor-advised fund recurring donors.** They are like check donors because you're receiving a check from a Fidelity, Schwab, Benevity, Mellon, or other donor-advised fund provider. You'll receive a letter that indicates the giving fund, and it indicates the donor, if the donor wants to pass that information on to you. (They can choose to stay anonymous.) And even if you know who they are, the donor may not want to receive any recognition. The letter will clearly state this.

The donor-advised fund provider is technically the donor who gets the "hard" credit and the monthly donor gets the "soft" credit. Donor-advised fund donations are not tax-deductible as the donor already takes the deduction when they put money into their donor advised fund (so no double dipping). Recurring gifts are possible with and without an end date, typically \$50 minimum.

Keep the donors in your newsletter and general updates, don't mention the tax-deductibility and be mindful of asking for extra gifts.

**Facebook (and other social media and crowdfunding) Monthly Donors.** Some of you may have used a crowdfunding channel like Global giving and the former GoFundMe, change.org, etc. While it's okay to generate one-time gifts, for monthly gifts, it gets a bit more complicated.

That’s why I typically recommend that whenever you use social media, or crowdfunding, looking for monthly gifts, you always direct people to your own site—so it all goes into your normal monthly donor bucket.

If you have been using any of the above channels for a while, you may need to do some extra work to identify these monthly donors. If the money comes in through Facebook, it will not indicate that it is a monthly donation on the transaction report provided by Facebook.

To figure out who is giving monthly through Facebook, you have to be signed up for Facebook’s Charitable Giving Tools. This means you have signed up formally through Facebook, and you are receiving donations through Facebook bi-monthly through direct deposit. If you are still receiving checks through Network for Good, you must sign up for Facebook Charitable Giving so you will be able to get information on your Facebook donors.

Once you have Facebook Charitable Giving set up, you can go into your Facebook page settings and under “Donations,” you’ll find an option to have a “Multi-Day Transaction Report” emailed to you. Request at least six full months of data. You should get the report in your inbox less than five minutes later.

Once you have this report, you can do an easy sort to find donors who are giving multiple months in a row. Once you find some who are giving monthly through Facebook, you can count them in your monthly giving totals, but you will want to have a good idea of how many and who are giving this way. Note that you’ll also have to stay on top of those who stop giving monthly!

Many donors do not realize that *how* they give or *through which channel* makes a difference, so they may call your organization to make a change to their monthly gift. You will want to be prepared to explain how they can do it themselves within their Facebook account settings.

You may even be able to convince them to cancel their monthly gift on Facebook and set it up directly with your organization. This type of customer service will go a long way in your donors’ eyes.



Take a little time once a quarter and see if you can uncover some new hidden monthly donors.

You may be sitting on some additional “sleeping giants,” donors who are giving monthly to your organization without you even knowing it. Remember, donors want to help, and they want to help in the way that works best for them.

Recognize and support them accordingly, and you’ll be able to grow your monthly donor program with more hidden gems.



## 69. Update Receipt Emails

If you have a monthly giving program, your processor may send a gift confirmation email every month. What the receipt looks like and how much you can control that confirmation email depends on your “system.”

In some cases, the monthly email looks like a receipt. In other cases, you can customize it and add words to the payment information. Sometimes, it’s just a short blip, and it can even be sent as a text message.

In some systems, you can set it to send the first join email, and then suppress subsequent receipts.

If you can do so, I recommend doing that and replacing it with a warmer, fuzzier update email to your monthly donors instead. Which animal, client, child, or patient was helped? A short story can go a long way of demonstrating the impact the monthly donor is having.

However, if your system spits out a standard receipt, there may be nothing you can do about it. In that case, I recommend you send a special warm and fuzzy update right before the receipt goes out or at least once a month if dates vary.

If you send regular emails, consider a thank you to your monthly donors in a special version at least once a month.

Finally, if your system generates monthly messages and you can’t suppress them, but you *can* customize them, please do take some time to update them.

Way too many organizations send me stories that have been the same, month after month, year after year. **If you can change it, please do!** It will go a long way. If you don’t change it, you show the donor you don’t really care.

You don’t want to miss out on the wonderful opportunity to tell the donor how their monthly gifts are making a difference, today. You also don’t want to miss out on the opportunity to ask the donor to become engaged in another way.

This is typically not the time to ask for an additional gift, but it can be the time to ask your monthly donors to share a petition, to do a little quiz, or to allow them to request more information about one of your special programs or legacy gifts.

Here is an example of an email that should be easy to update with some special news or a story.

Thank you . . . your faithfulness is truly inspiring and a blessing for your homeless and hungry neighbors.

We’re so grateful for your generous gift of \$      to Helping Up Mission. Your donation will be used to help feed, clothe, and shelter those in need. But even more: Your gift also helps to convey the hope and healing that so many of our neighbors are desperately seeking.

Source: Helping Up Mission monthly donor thank you email



Exercise

Look at your monthly receipt emails. Can you create some changes and schedule them?

If you joined your own program, you'll be the first to know what happens. Sometimes systems make changes without letting us know. Set a regular reminder to review and update your messages as often as you can.

It's a golden opportunity, and it will help you keep your monthly donors longer! You'll continue to show the donor's impact—and your gratitude.

Here is an example of an email with a story. There is a different story every month and there is no receipt included.

Dear Erica,

Water ... it's the basis of all life, and no living thing can survive without it. Water makes up more than half our bodies and covers more than half the planet. Yet in many places around the world, it is scarce. There is no water to drink ... and when there is, it is not clean or healthy.

But thanks to your generous monthly support, that is changing for families in the 21 countries where we work ... families like Mairame's.

Source: Heifer International monthly donor thank you email



## 70. Send Regular Updates

In some cases, these regular updates can be appeals. You'll find more about asking for extra gifts in the Monthly Donor Upgrade section, but some of the approaches used for extra gifts are wonderful cultivation and recognition opportunities.

It's okay to offer special opportunities to your monthly donors to make an extra gift, **as long as you do it right!**

In the old days, monthly donors typically gave that way because they didn't want to receive any more mail or email. Now, the general trend is that monthly donors want to stay up-to-date and engaged and feel part of your mission.



Exercise

Look at your overall communication schedule and see which appeals make most sense to use as updates. Then have a special email intro for your emails. And for your mail, include your monthly donors in your personal note group or add a special lasered message with that recognition of their ongoing support.

Every organization is different. If you have a print newsletter, definitely include your monthly donors there. Once you start growing big enough, it makes sense to create a very special monthly donor newsletter, but until that time, usually your typical print newsletter will work just fine.

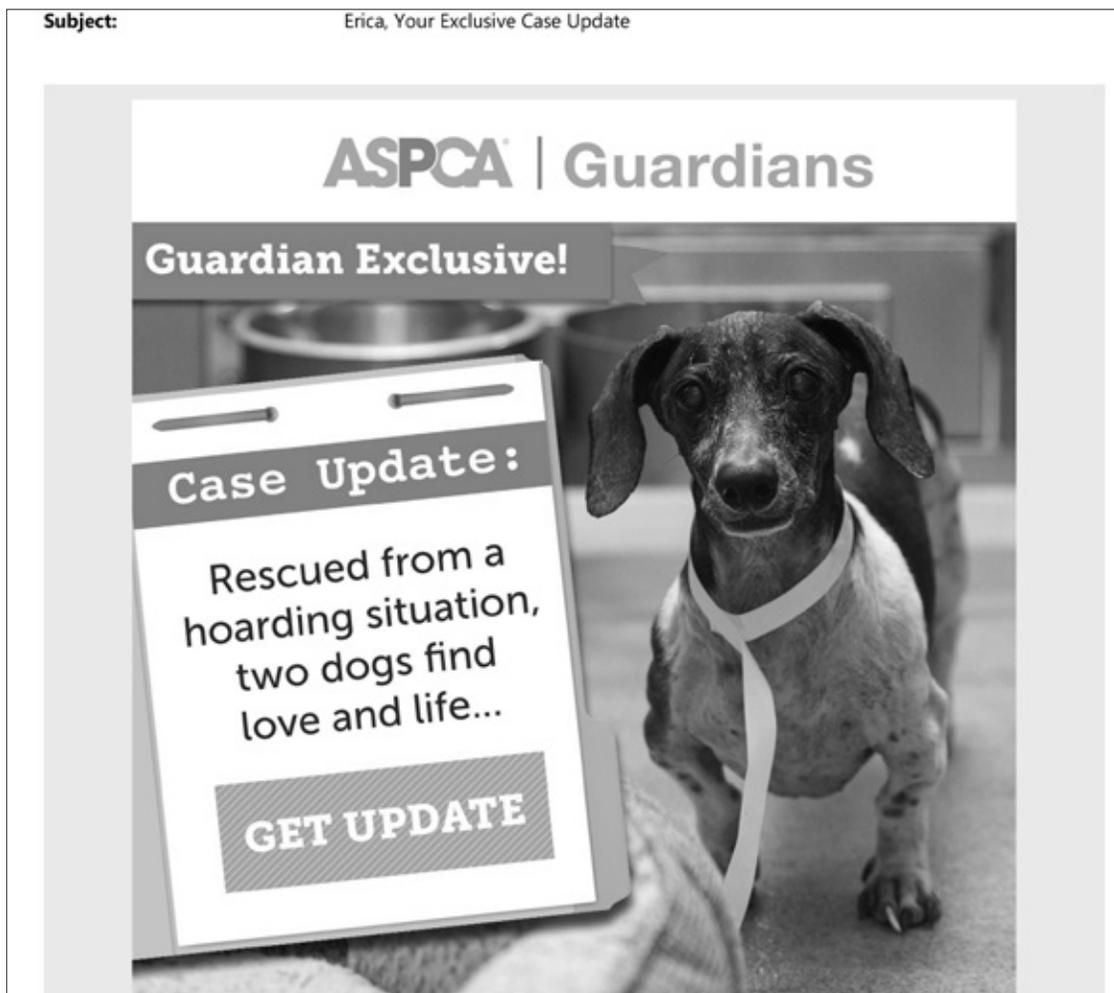
If you're sending one or two appeals a year to your other donors now, include your monthly donors. If you're sending four or more, pick the ones that you know are most successful. Matches and special project appeals are great.

Continue to keep your monthly donors in your email list and try to recognize them as a special group as often as you can. Do include them in your Giving Tuesday (or other giving day) messaging and include them in your year-end messaging.

Just as with a print newsletter, if you have an email newsletter, include your monthly donors there, preferably with a special intro.

Finally, it goes without saying that if a monthly donor tells you that they do not wish to receive mailings or emails or phone calls, you must flag them in your donor base and your email program and suppress them from your communications.

Here is an example of a special, branded monthly donor email.



Source: ASPCA monthly donor special thank you email



## 71. Use Thank You Video

Video is always great, and it gets terrific open rates and engagement rates.

But, before you think expensive video and dollar signs, look at some of your existing footage and materials you have from the past. Maybe you already have some video from an event, or your executive director has created a thank you video for another purpose.

Then send that in an email. Just because you care. Just because you appreciate the monthly donor's support.

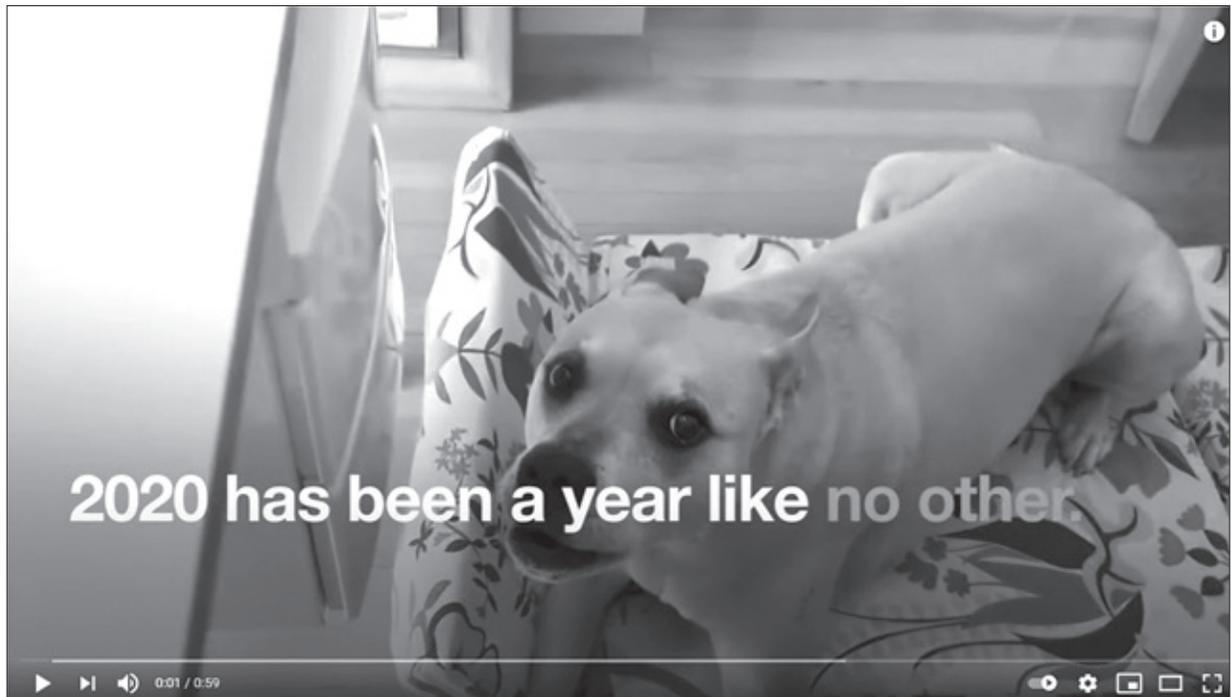
Depending upon your cause, there may be other things you can do and use. For example, if yours is an animal organization, you may have some video footage of cute animals. Who doesn't love a bunch of puppies painting or kittens rolling around?

By now I hope you've signed up as a monthly donor, so you may be receiving some great ideas from other organizations. Of course, you're different, but the principle of how fun and effective video can be is valid for every nonprofit.

There are also some ways to make highly personalized (with the donor's name) thank you videos now that use existing footage. Or you can create very personal and quick thank you videos.

Check out Thankview, CauseVid, Bonjoro—and check your donor base. I know several of them have started or are starting to integrate thank you videos in their services mix.

Videos do not have to be very fancy or expensive. Raw footage is often even more powerful. Videos just have to be authentic! Of course, animal organizations have a little bit of an advantage there. Just take a look at this video update.



Source: Best Friends Animal Society thank you email/year overview



## 72. Send Surveys

In the Monthly Donor Acquisition section, I shared how testimonials from existing monthly donors can be very powerful. That's why part of the recognition and cultivation process is to find ways to ask your (new) monthly donors why they joined the program. Then ask for permission to use their testimonial.

There are a few ways to find out more about your monthly donors. The best way is by sending a survey. You can send that via email; you can send one along with the thank you letter, the tax letter, or as a special invitation; you can call the monthly donor and have a conversation. You can send the survey as an unexpected note with a simple reply card and reply envelope. There is no bad way to find out more about your monthly donors.

You can, of course, look at the donor's giving history, so you don't have to ask about that in a survey. But you can find out their age group, some demographic information, like their birth date or birth year, or ask for permission to communicate with them via phone/text/email. And you can ask why the donor gives monthly and why they support you.

Surveys are great ways to engage monthly donors and learn as much as you can about them. Later, you may wish to use a so-called Connection survey\* to find out if they're interested in leaving you in their will.



### Exercise

What are some questions you could ask your new and existing monthly donors for your organization? For online surveys, consider no more than 7 questions. Keep it simple and doable. You don't want the donor to spend more than 5 minutes filling out a survey. One question should be: What made you decide to help with a monthly gift?

Test a survey among a small group of donors. See what you get back and identify some opportunities where and when you can best use monthly donor testimonials. It's okay to follow up and ask for a video or meeting. I bet your monthly donors will be thrilled to help!

\*source Sean Triner, Moceanic Fundraising



## 73. Send Tax Letter

Think of this as a great service to your monthly donors. They don't need to keep track of their individual gifts because you've done that for them.

Your tax letter should ideally include a short story of a client, individual, or animal the donor has helped. Or maybe you have a few great quotes from people who have been helped by your organization. They can often be very powerful and confirm that the monthly donor made the right decision to give in that way.

Start creating a rough draft early January—or even before that. Then once all your gifts have been entered into your donor base, you can select your monthly donors, regardless of their amount.

One thing people always ask me is: “Should I list every single monthly gift?” My answer is that you’re better off showing just the grand total as that’s really all the donor needs and use the space to tell an impact story. Do include every gift, not just their monthly gifts.



If the donor has made gifts from their Donor Advised Fund, those gifts should NOT be included in the total.

A tax letter offers a great opportunity to make the monthly donor feel good and happy that they chose to commit to give to you on a regular basis. Ideally, try sending this tax letter via email and via postal mail! You can find a downloadable template on [www.adirectsolution.com/monthly-giving-made-easy](http://www.adirectsolution.com/monthly-giving-made-easy).

The next question fundraisers ask me is: “Should I use the tax letter and ask my monthly donors to upgrade at the same time?”

My answer is that this should really be a thank you letter with a total overview of giving. They’ll put it with their tax papers. It’s a service you provide to them. You can, however, put in a little insert talking about legacy gifts.

Then in February, go for the upgrade. You’ll find more about this in the Monthly Donor Upgrade section.



## 74. Use Text Messaging

Earlier I shared the latest statistics on the use of mobile phones and texting. Even older donors are very comfortable with texting, these days. If a donor gave you their mobile phone number and has allowed you to text them, you can use that for recognition as well.

Once you have a donor’s mobile phone number, this also opens the door to additional opportunities such as prerecorded voice messages announcing a special donor call. Or thank you calls.

Some systems send a text message every time your card is being charged for a monthly gift. In some you can suppress it, but not all. Just like the automated email receipts, I suggest you suppress when you can and do something warm and fuzzy instead.



Look at how many mobile phone numbers you have for your donors? Can you distinguish those in your donor base?

What could your message be, to say thank you and make the monthly donor feel really special? Can you get permission from your donors to text them updates? Links with a great picture or a video may always be welcome!



## 75. Confirm Changes In Writing

While this is not part of the initial recognition and cultivation, I recommend you always confirm a major change in the monthly donor’s journey as a special service and confirmation.

At a bare minimum, make sure you send an email confirmation. But I also recommend you send a letter or thank you card by mail, even if the donor makes a change online.

A change can be a payment type conversion, an upgrade, or a cancellation. Sending a letter is not only a great service, but it also is one last “check point” to verify that the monthly donor indeed meant to change their payment type or upgrade.

It should be a warm, fuzzy thank you, expressing your tremendous gratitude for this next step in the monthly donor’s commitment.

It may have been a few years since the donor first started their monthly gift. So, in addition to confirming the change, your thank you allows you to provide an update in contact and confirm the phone number and email information for the person in your organization dealing with monthly gifts.

Here is an upgrade confirmation email that shows the new amount as just one example of confirming changes in writing. We’ll review monthly donor upgrades later. 🌿

Your monthly gift will make a big impact on the lives of animals in need. Thank you for supporting the ASPCA.



**ASPCA** Thank You!

Thank you for being a part of the ASPCA Guardian Monthly Giving Program, and going above and beyond to help animals in need. We have successfully increased your monthly gift to \$8 , which will be reflected in your next monthly payment. We are honored by your dedication to helping America’s homeless, abused and neglected animals. It is with your continued and generous support that our lifesaving programs are able to reach thousands of animals in need across the country each year.

If you have any questions about your ASPCA Guardian membership, please call our Guardian member support line, (800) 628-0028. Please allow up to 30 days for any changes to take effect.

The success of our lifesaving programs begins with dedicated friends like you, and we’re honored to have you by our side. On behalf of the animals we serve, thank you for your generous support.

Source: ASPCA Guardians upgrade confirmation email



*It always seems impossible until it's done.* – Nelson Mandela

## PART VI



### MONTHLY DONOR RETENTION



Source: Pixabay



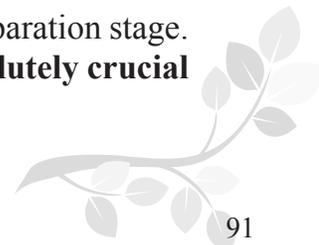
#### **76. Retention General**

In my experience, the retention phase is the most crucial and, alas, also the most difficult stage.

Think of retention as a way you can prevent your monthly donor (and program) from a mid-life crisis! The good news is that you can prepare for it...

Everything you and I do as fundraisers is all about having the right mindset. If you know that some of your monthly donors' cards will expire or decline, that's half the battle. But at times it can feel cumbersome. At times you may not quite be in the mood to follow up.

Some of the crucial elements of retention we already discussed in the preparation stage. But it may be time to revisit and look at it from the retention angle. **It's absolutely crucial to write down the process.**





Do yourself a favor. Unless your donor base has a dashboard or an easy way to show this, set up a little tracking sheet. How many monthly donors are at risk if you don't follow-up? What's their annual value? Is it worth some time to act? You betcha!

How often and when are monthly donor gifts charged? How do you get the information that a monthly donor's card expired? Do you get an alert from your system ahead of time? Or do you have to wait till this month's charges have been attempted and you get the error/decline messaging from your bank or credit card company? Who provides you with that information? And how soon?

It's important to have a plan ready to follow up. Then write down what you do with those credit cards that expire or decline. You'll have to deal with those every two to three years and in some cases now every five years (depending upon the type of card), so monthly donors can come back to this follow-up stage several times.

It's also important to know the difference between monthly donor dropouts and cancellations. They require a different approach.

If the donor contacts you to stop their monthly gifts, I call that a **Hard Cancel**. Not all is lost yet, but sometimes things happen in donors' lives that affect their giving.

If the donor does not contact you to stop, but their payment doesn't come in, I call that a **Soft Cancel**.

If you did a good job in the recognition and cultivation stage, your donors would not want to stop their great experience, so you may not see that many hard cancels.

You can expect many more soft cancels though, but donors will be more likely to give you their updated information if you ask them.

It's important to take action as soon as possible and contact the donor as a courtesy. Work with your payment processor or donor base to implement the credit card updater. Make sure you're prepared to ask your donors for an update.

Just remember, the donors didn't call or write to cancel. They want to continue! You're doing your monthly donor a favor asking them for their updated information.

So, be sure to act right away and keep your sustainer giving monthly. No mid-life monthly donor crises to avert here, but rather continued unrestricted sustainable revenue that keeps on coming!

Finally, in this retention section we will also look at trying to bring former lapsed monthly donors back. You can of course feed them back as part of the many approaches we discussed in the acquisition section, but it's worth pointing out some reactivation options in particular.



On the resource page [www.adirectsolution.com/monthly-giving-made-easy](http://www.adirectsolution.com/monthly-giving-made-easy), make sure you download the Monthly Donor Retention Playbook with customizable templates.



## 77. Prioritize Failed Payment Follow-Ups

In the many years I've been working in monthly giving, I see three main reasons why retention can be a challenge for fundraisers:

1. **Nobody feels responsible** for tracking monthly donor dropouts and attrition (a fancier word for dropout percentage).

Believe it or not, while you think this may be more rampant in a bigger organization, it's also a problem in smaller organizations. Unless someone is completely responsible for the monthly giving program and tracks all the trends for their monthly donors' life stages, it's going to be tough to really grow.

2. **The dropout follow-up process is not written down.**

Why is this important? You need to know what your system does or *can do* when you get the information that a monthly donor's card expires (some systems provide you this information before it happens). If you have a credit card updater, add that to the mix. In addition, you need to specify and write down what you or someone in your organization should do when a card expires.

This may sound silly and simplistic, but it's amazing how much you learn by taking just a few moments to write things down. And taking reason No. 1 into consideration: sometimes it's not clear whose job it is to follow up, so nothing happens. Not to mention that this process should be a task that is done consistently every month. I get it—fundraisers are busy, but if it's written down, and it's part of someone's job to follow up, it will (hopefully) get done.

3. **Fundraisers feel like they're naggers.**

They often think: "If the donor didn't contact us to give their updated credit card information, they probably don't want to continue." Not true.

Just think about it: Donors are busy, so when they get their new credit card in the mail, they sign it, stick it in their wallet and then go on to the next activity. *Unless* you contact them and remind them that they need to provide you with the updated information, they're not necessarily going to do this on their own. That doesn't mean they don't care, they're just busy.

I recommend you approach a monthly donor payment problem reminder as a *courtesy* to the donor. Send them a friendly, personal email with a link to an update page and a phone number to call. Call them and leave them a voice message. Send them a letter. And if they don't respond at first, send them a friendly follow-up. Remember, donors are busy.

Ultimately, donors want to support you. They want to help. Monthly donors are no different. So, do them a favor, follow up and prevent them from dropping out. That's how you grow.



## **Program Goes Off Track Because Nobody Is In Charge**

An animal welfare organization was very proud of its 17,000 sustainers, generated through a mix of direct mail, emails, and telephone fundraising.

But then it started losing its monthly donors to the tune of 300 to 500 a month! The number of new sustainers was simply not keeping up with the losses.

They brought in a consultant to review their program and see if it could be turned around. The first thing they did was “map out the process.” And it soon became clear that nobody really felt responsible. The fundraisers were working hard to bring in new sustainers.

But they didn’t check the payments coming in because finance was doing that. The “techies” were running the lapsing sustainer report every month and would send lapsing names to the telemarketing agency to follow up—but didn’t realize the increased lost amount was “a big deal.” They saw a “small” amount. “It’s just \$7,000 a month,” they said.

Immediately, the consultant pointed out that it’s not just \$7,000 a month. Instead, the organization was losing \$85,000 a year!! Whoa, now people took notice!

The process map also uncovered that something had happened with a code, and as a result, credit card expiration letters were not being generated. Discussion with the telemarketer brought to light that the callers were not leaving any messages, so again, they were not reaching as many of their lapsing monthly donors as possible.

Finally, even though so many donors had signed up online to give monthly, there was no email message in place to follow up.

The small investment of bringing in an outsider to take a fresh look helped turn this program around. A process was created to send out an email right away after the donor’s payment stopped. With the new processes in place, the organization was able to reactivate more lapsed sustainers, and they’re back to growing again.

Of course, it also helped that the organization decided to put someone in charge of the program—coordinating with all internal departments and external partners—so that the annual value of sustainers continues to be at the forefront, across the whole organization.



## 78. Try Saving Hard Cancels

If there was one time that organizations expected monthly donors to contact them to cancel their monthly gifts, it was early on during the pandemic.

The good news is: yes, some organizations did see a slightly higher number of cancels in March, 2020, but by April and May, the numbers went back to pre-pandemic levels.

Especially those organizations that were prepared with a so-called “save script” were able to prevent some 20 to 30% of those cancellations.

A save script was put in place for those answering the phone, allowing them to offer some solutions.

1. A smaller monthly amount. Oftentimes monthly donors don’t realize they can downgrade. They want to help, so allowing them to do so with a smaller amount is great.
2. A pause. You haven’t lost them, you just lost some revenue.
3. If the monthly donor does not want a smaller amount or a pause, ask them if they’d at least like to continue hearing from you. In most cases they’ll say yes; that will allow you to reactivate them later.

If a donor calls you, they care. So use that opportunity to save them. You’re better off getting a smaller amount or future monthly gifts than none at all.

It goes without saying that you should not be too pushy with the save script. The monthly donor must feel comfortable with the solution.



Exercise

Download the save script as part of the Monthly Donor Retention Playbook at [www.adirectsolution.com/monthly-giving-made-easy](http://www.adirectsolution.com/monthly-giving-made-easy) and create a save script for your organization. Give it to anybody who is answering the phone.



Case Study

### Fundraising Staff Delays Monthly Donor Growth

Be warned. This is a sad case study!

The executive director of an organization supporting food programs wanted to grow their monthly donor program. At least, that’s what he said at first.

They had approximately 500 sustainers, worth more than half a million dollars, receiving very high average monthly gifts. Because they limited recruitment to in person requests, they only added about 40 new monthly donors a year.

But the bigger concern was that in the past few months, they had lost 25

Continued...

...continued **Case Study: Fundraising Staff Delays Monthly Donor Growth**

monthly donors. That's more than half of the number they brought in last year! If this were to continue, the program would quickly deteriorate.

When asked what the reason was for the cancellations, they indicated that donors told them they just couldn't manage continuing at this level. The good news: there's an easy fix.

If you talk to your donor, why not offer them to continue giving monthly but at a lower level? At least that way you continue receiving some funds instead of ZERO. Just the fact that the donor calls you is a great opportunity to "negotiate."

We then started talking about what else they do with monthly donors whose card expired or declined. In their system, they were able to see that the credit card would be expiring a month ahead of time, so they could be proactive.

This is when it became interesting (or should I say SAD)!

They would send one email to a lapsed sustainer. Then they would make one phone call "if they had time." They started sending a text message. They were not sending any letters and no link to an online renewal page in the email. Instead, people were asked to call the office.

The internal admin staff was very "reluctant to try anything new." And when presented with a few ideas to grow the program, they became extremely hesitant. "Oh, I don't think we want to handle more than 500 monthly donors!"

WHAT? Wait, didn't the exec just tell me you wanted to grow again? Just do the math!

So, this is a HUGE problem. If you have internal staff who will balk at every suggestion or is simply not willing to manage your monthly donor program, with the occasional follow ups needed: please, please find someone else who is willing to keep the existing monthly donors and bring in new ones.

You're not doing your donors or your program a favor if you rely on someone who is not committed to it. You're preventing future growth, so please ensure that whoever is handling your monthly donor program totally understands the tremendous power and is willing to do whatever it takes to grow the program to the next amazing level.

You're asking your donors to commit to giving monthly for a long time, so make sure that your internal staff is committed to that same growth as well. If that's not the case, consider your options carefully.



## 79. Write Down Your Retention Process

If you write down what you're currently doing—and the results you're getting—that will help you determine if you can add more. This also helps you determine what your systems can handle and what you need to do manually or outsource.

Every system is different. Some will allow you to see upcoming credit cards before they expire. Others will not and you may have to wait till the payment doesn't come in. It's important to realize what you're doing.

Then write down what you're currently doing and how soon. When does the email go out, when does the call happen, when does the letter go out? How many of each? What are the results?



Take a few minutes to write down your process that works with your system. From start to finish.



**Case  
Study**

### Organization Stops Sustainer Decline With One Change

An organization was curious to see if it could grow its monthly giving program. The first step was to implement a Monthly Giving Audit, followed by a complete review of their current processes, recommendations for the cultivation, recognition, and marketing of their program.

At the time, the organization had some 6,000 monthly donors as part of approximately 75,000 active donors (donors who'd given in the previous 12 months). The program is not really branded, and they are typically called "online monthly donors." (Donors were driven to go online through monthly printed newsletters and email appeals.)

Prior to the review, the organization had seen a major decline in the number of monthly donors. They had lost approximately 4,000 monthly donors over the past few years. This was a major loss, and their program was decreasing, so we had to figure out why.

It didn't take too long to figure this out. After testing the forms online, we quickly saw that their online giving form had an *END DATE* the donor was required to include. The first thing we recommended was to remove the end date.

In the 6 months after the audit and following other recommendations we provided, the organization brought in more monthly donors compared to the full year before. Even with minimal investment in the program, it's breaking even in six months or less.

Reviewing and writing down the process with some fresh eyes and changing one 'little' thing made all the difference.



## **80. Create A Monthly Donor Retention Day**

If you're serious about growing your monthly donor program, each and every day should be a monthly donor retention day. But, at a minimum, make it once a month. When should that day be?

Well, that depends on when you (or your payment processor) charge your donors' cards every month. If that happens on the 15th of the month, make the 16th "Monthly Donor Retention Day."

If it happens on the 1st, make it the 2nd—basically the day after you know if your monthly donors' cards were charged for their next monthly gift.

If your program is larger, and you're charging a few times a month, create a Monthly Donor Retention Day the next day after each charge.

If your system charges on an ongoing basis, pick a day closest to the day you see most of your monthly gifts are charged.

Make it your focus as soon as you come into the office. Look at the list and see if there was anybody whose payment didn't go through.

Then pick up the phone and call. Right away! Then sit down and write a personal email. Right away! And if you can't reach your donor, and you're not getting a response by the next day, send a letter. Better yet, just create the letter and send it. It's a stamp that will come back to you multifold.

Of course, if your system can see a month in advance if the card is going to expire, you can act on Monthly Donor Retention Day the month before. But often, you will not know until it's almost too late.

Don't ever think you're nagging your recurring donor. He or she did not cancel. They want to give, but they simply didn't realize they have to let you know. So, do something! Do all of it!

If you wrote down your process earlier, you'll know which of the following your system does, which you are already doing and which you can or may not be able to do.

- Make a thank you call.
- Send an email.
- Send a letter.
- Make a call.
- Send a text message.
- Use the credit card/account updater option, if possible.

And yes, it may feel like a pain to have to follow-up, but it's worth it.

## 81. Calculate Monthly Donor Value At Risk

On [www.adirectsolution.com/monthly-giving-made-easy](http://www.adirectsolution.com/monthly-giving-made-easy) you'll find a special calculator: the Monthly Donors At Risk Annualizer™.

Retention is crucial, yet so many nonprofits don't realize its importance. So often this part can feel like a bit of a “drag.” That's why a simple tracker can make a huge difference.

Because you'll see that it's totally worth spending a bit of time and a few emails, letters, and phone calls to keep them.

<p><b>Monthly Donors At Risk Annualizer™</b></p> <p><i>Enter the Number of Monthly Donors you might lose this month and Average Monthly Gift (right) to calculate your estimated annual revenue at risk .</i></p>	<i>Number of Monthly Donors at risk</i>	5
	<i>Average Monthly Pledge Amount at risk</i>	\$25
	<i>Average Monthly Revenue at risk</i>	\$125
	<i>Average Annualized Revenue at risk</i>	\$1,500

Source: Erica Waasdorp, A Direct Solution

Annualize the value of your monthly donors in everything you do. You'll know their power and you'll be even more excited to grow and keep this group of really loyal donors.

Look at the value at risk—and recaptured—so you'll know all your hard work is paying off. You'll quickly see the value of a Monthly Donor Retention Day, and you'll enjoy calling the donors and having conversations. You may even be able to upgrade them to a higher monthly gift! You will not know until you try!

## 82. Pull Out All The Stops

Do not delay in your communication. I know that you'd like to wait till you hear back from the donor when you send an email or a phone call. You'd hate to waste a stamp on a letter if you don't really need to. The reality is that you only have one month before the next payment is supposed to be processed. That time will fly.

If your system provides you with that information, reach out to the donor BEFORE the payment doesn't come in. But if that's not possible, take action right away.



**Exercise**

Go to the [www.adirectsolution.com/monthly-giving-made-easy](http://www.adirectsolution.com/monthly-giving-made-easy) and download the Monthly Donor Retention Playbook and customize it for your organization. It has everything you need to pull out all the stops to get the monthly donor's updated payment information so their gifts can continue uninterrupted.

Here is an example of an email sent automatically by the payment processor.



**Attention needed!**  
Update your payment method

**We couldn't process your recurring donation**

We're emailing to notify you that your monthly recurring donation did not go through this month. This typically happens when your card expires or your card number changed for some reason.

Your monthly contribution is extremely important to our organization, and we're hoping that you could update your payment information so that it can continue to help us each month. To update your information, simply click the link below and enter your new payment method details.

– Your friends at Daily Table.

[Update Payment Details](#)

Source: Fundraise Up, Daily Table automated email, thanks to Betsy Santarlasci, Daily Table



## Organization Tweaks Reminders And Improves Retention

An international children’s charity had a robust monthly donor program, generating new sustainers through multiple channels, to include mail, phone, email, canvassing, and TV.

They also had an extensive monthly donor retention program in place, following up on lapsing monthly donors for 6 months through mail, phone, text messaging, and email.

They had recently made some further improvements by implementing the credit card updater and retrying the donor’s card a few times to optimize the number of payments processed. Now they wanted to find additional ways to increase retention.

The organization accepts monthly donors through checks, EFT, and credit card, each requiring a different approach. The minute someone’s payment didn’t come in, the donor would receive a reminder bill with a specific reference to the type of payment.

With the help of a consultant and a creative agency, the organization reviewed its many billing options and went through an extensive revamp. As I’m sure you can imagine, this did not just become a creative exercise, it was also a good time to revisit systems and processes.

The two big ideas presented and implemented were:

- To create a link to a special credit card renewal page in every email and text message, which alone helped improve retention rate by 50%!
- To actively promote the conversion of check reminder sustainers to EFT by making it easy on the reply form.

Finally, this billing process review caused the organization to revisit its retention reporting for the payment types and channels—in order to make trends and retention rates much easier to read.

### 83. Use Credit Card Updater

Many nonprofits have told me that this is a true “game changer.” Credit card updater (also called account updater, account recycling, or account recovery—or some variation thereof) is becoming more and more popular.

Some donor base systems have started offering it. Some systems charge a flat fee every month, and some charge a small fee based upon the amount to be recovered. In any event, it’s totally worth it!

Credit card updater works in the back end, is totally compliant with the national and international Payment Card Industry (PCI) guidelines and standards and is typically able to find updated information for some 15 to 35 percent of your cards.

That's 15 to 35 percent of monthly donors you do not have to contact. The updated cards are charged, and the money keeps coming in.

Of course, you do have to consider your total number of monthly donors. In my view, I'd definitely look at account updater if you have 500 monthly donors or more—or if that's your goal.

The way it works is this: the system identifies those cards where payments are not going through. They are then hit against a huge database with updated information (all tokenized and PCI-compliant), and the database finds the new card info, updates it, and processes the monthly charge. So, you won't lose that payment and, better yet, you don't lose that monthly donor!

Ask your payment processor or donor base company if they can offer this, because they need to set it up for you. You'll still have to immediately call, email and write to those donors not yet captured through the account updater system, but the number will be smaller.

Remember the annualized value at risk. Investing a tiny amount to retain the monthly donor is worth it. You'll improve your monthly donor retention rate and yearly value.



## **84. Convert Check or Card Monthly Donors To EFT/ACH**

Some organizations may consider this an upgrade as well. For the purposes of this book, as it has a major positive impact on your monthly donor retention, I consider it part of the retention process.

Occasionally, I come across organizations that offer check statements or check reminders to their monthly donors. Some find it a good way to offer monthly giving to their (especially) older donors.

Retention rate is not that high (it usually hovers between 50 and 65%) because donors do not make all their 12 payments. Some will send in their monthly gift in appeals, others just forget.

What works well for those organizations is a consistent approach to convert check statement donors to Electronic Funds Transfer (EFT) or ACH. You may also see those terms “disguised” as Direct debits, eCheck, Automatic Bank Withdrawal, Automatic Bank transfer, Auto gift, Easy gift, Preauthorized Debits in Canada, etc.

The approach is simple, really. Make the case that you can spend more money on your mission if the donor converts to give monthly via EFT/ACH, and many will consider that. Mind you, there will always be donors who will never be comfortable with that so you may be “stuck” with some of them for the rest of their lives. Flag those who told you they do not want to be asked about this, so you'll know.

Any donor you can convert from check statements to EFT will immediately help with your retention rates. You'll go from 50 to 65% to 95%. Donors do not change their bank account that often.

Also, if you can convert credit card monthly donors to give via EFT/ACH, that improves retention, too, and it will prevent you from having to worry about updating payment failures. Win-win in so many ways!

If you're currently not able to allow donors to pay for the credit card fees, you can make the savings case. Just calculate the yearly credit card and processing fees of all your monthly donors and use that number.

If you are allowing donors to pay for the credit card fees, which so many systems offer now, the "savings" reason is a bit harder to sell, but you can make the case that it keeps the donor information safer.

You can offer EFT/ACH during credit card expiration or decline messaging. You can offer it during upgrades, you can offer it from the get-go, online (if your system allows). You can offer it through a downloadable form. The benefits of getting EFT/ACH monthly donors are endless. Currently some 5% of monthly donors give that way, but that is growing, especially among younger donors.

Here is an example of a conversion appeal by mail.

- **Easy.** You won't have to update your credit card information when the card expires. Your gifts will process securely and automatically.
- **Flexible.** You can change or cancel your donations whenever you choose.

Switching to automatic, monthly transfers from your checking account costs you nothing, but it accomplishes something incredibly powerful: It stretches your donations even further to help more families build strong foundations for brighter futures.

I hope you already know what an extraordinary impact you are making for children and parents who are eager to escape housing that is unsafe and deteriorating. With a little help, many more

*(over, please)*

P.O. Box 1088 • Americus, GA 31709-1088 • habitat.org • (800) 422-4828

SWITCH TO EFT TO HELP MORE FAMILIES!

**STEP 1:**

Yes, I want to switch my HopeBuilder gift from credit card to monthly EFT.

**Pledge Amount:** \$ \_\_\_\_\_

Erica Waasdorp  
30 Frazier Way  
Marstons Mills, MA 02648-1866

**STEP 3:**

Please sign below and return this slip in the enclosed envelope. Thank you!

Signature \_\_\_\_\_ Date \_\_\_\_\_

**Pledge ID:** rev-55989625

**Current Payment Frequency:** Monthly

**Current Payment Method:** Credit card

**Designation:** Global Impact

**STEP 2:**

Provide your checking account transfer information.

The enclosed check for this month's gift also authorizes Habitat for Humanity to arrange for EFT with my bank.



HopeBuilders P.O. Box 1088 • Americus, GA 31709-1088 • habitat.org • (800) 422-4828

DHBM21012216200 1-62126615-01

Source: Habitat for Humanity Hopebuilders EFT conversion pack



## 85. Reactivate Lapsed Monthly Donors

If you've implemented the approaches described in the Monthly Donor Retention Playbook and you still lose some, do not despair.

Pick a few times a year you can take another look at bringing back lapsed monthly donors. This could be during your special Monthly Donor Campaign month.

Select those monthly donor soft cancels who haven't given monthly in 6 months or more. Include them in your next monthly donor appeal with a special segment.

Include them in your phone campaigns. Sometimes it just takes one more call. Sometimes it's simply a matter of including your lapsed monthly donors in your appeals and emails.

Never give up on monthly donors. Simply look at your communication schedule and see where you can build in a reactivation ask. Segment those lapsed monthly donors and see what happens. 🌱



**Exercise**

Take a look back at your monthly donor acquisition options and see what works well there. Then use it to bring back those lapsed monthly donors.



### Keeping Monthly Donors Is Not Rocket Science

When this fundraiser came to her human service organization in Canada, she noticed that the organization had a nice number of recurring donors, but that the program was on a slow decline due to an obvious reason: many were giving by credit card and their payments had stopped. Only 50% of the monthly donors in the Raiser's Edge database were still active at the time.

Many of the monthly donors had been acquired using a monthly donor tick box on the annual appeals. At the time she started working on the program, none of the monthly donors were giving via Pre-Authorized Debits (PADs as they call them in Canada, also known as EFT/ACH/Direct debits/automatic bank withdrawals).

With the help of a database expert, she sifted through the database, and implemented standardized rules and best practices to better track and grow their monthly donors, and improve stewardship to them—and all donors, for that matter!

While they were working on this, the fundraiser picked up the phone, making some two calls a day. And she simply wouldn't (and still doesn't) give up. If, at first, donors didn't respond, she'd call them back the next month and then the

*Continued...*



...continued **Case Study: Keeping Monthly Donors Is Not Rocket Science**

next, until she had spoken with all recurring donors who had lapsed.

Through this process, she not only reactivated monthly donors, but she was able to implement Pre-Authorized Debits. Now 10% of all her monthly donors are giving that way. This is great, because there are no more expiring credit cards from this group.

This committed fundraiser also started calling monthly donors *before* their credit cards expire to remind them to update. This too was very successful. She never gives up on lapsing monthly donors. The results are astounding. Since she started, no monthly donors have lapsed because of an expiring or declining credit card. Some indicated they couldn't continue at their earlier level, but the "keep rate" was tremendous.

You may say: "I'm way too busy to do all of this." The reality is that this fundraiser doesn't just work on monthly donors. Like many fundraisers in small shops, she is busy, and she wears many hats. But she knows that if she doesn't take action, these recurring givers will lapse. She's determined that doesn't happen on her watch!

She has simply made the commitment to call a few people a day. If they say no, she records their response. If their circumstances have changed, she makes a note in the database.

This fundraiser told me: "Keeping monthly donors is not rocket science. You just must do the work. You must look at the details. You must love people and love data. Monthly donors don't take up a lot of time, but if you realize that they have twice the lifetime value of other donors, it helps."

I give this wonderful fundraiser the highest praise. She's committed to monthly donor retention and the results for her organization show. You can do it too!



*You miss 100% of the chances you don't take.* – Wayne Gretzky

## PART VII



# MONTHLY DONOR UPGRADES



### 86. Upgrades General

By now, you've probably built a nice monthly donor program.

By now, most of your monthly donors may have been giving monthly for a few months or even longer than a year.

They may give at any level. Some may have started at \$5 a month. Some may give \$85 a month and are now at the \$1,000 level.

I've even seen organizations with \$500 a month donors—and even higher. A few large organizations with a substantial base of monthly donors have now started testing a special mid-level monthly donor program. Something to think about in the future. For now, the bulk of monthly donors really comes from your donors below \$250.

However, the fact is that monthly donors permeate all your fundraising programs, and depending upon where they fall, you may have to adjust your approach. You may start cultivating some monthly donors as major donors, providing even more personal attention and assigning them to a major donor portfolio.

As a fundraiser, you wouldn't do your job if you weren't looking to engage monthly donors more and trying to upgrade them to higher levels.



Source: Pixabay



For this book, I'll describe three main ways of doing this:

1. Upgrade them to a higher monthly gift.
2. Include them in extra gift opportunities.
3. Ask them to leave you a gift in their will.

To keep this EASY, I'll consider special projects, capital campaigns, and major gift approaches as part of the extra gift opportunities. Monthly donors will self-identify, and if you can get them to make additional one-time gifts, they'll go up the ladder.

Remember, it's always about the donor and how they want to support your organization. As a fundraiser you'll offer them the opportunity to make a difference.

## 87. Time Your Monthly Donor Upgrade Ask

Timing is everything. I would *not* recommend asking monthly donors to upgrade their monthly gift too soon, but you can do so comfortably after they've been giving monthly for six months.

Most organizations find that nine to twelve months is the sweet spot, but you must find what works best for your donors.

But not too soon! *I've received a thank you letter for my monthly gift and the organization asked me to upgrade right away. Not cool!*

Additionally, you can start planting the idea that the donor can make a gift from his or her will—the ultimate upgrade and gift. It may take a while, but it doesn't have to take a huge investment of time or money. An insert in a tax letter, a tick box on reply forms in appeals, a testimonial in a newsletter or e-news update, etc.

Finally, if you take monthly giving seriously, you'll soon find some who distinguish themselves. They may start at \$5 a month, but they'll give an extra gift every time you ask them.

They may very well upgrade to \$6 or \$7 a month next year. Or even more. They'll be with you for the long haul, and they will go from small to larger, to possibly really large, but it is key to ask them to consider an upgrade at least once a year.

If you did a good job in the preparation stage, and you continue to do a great job in the recognition and cultivation stage, your monthly donors will love hearing from you—and they will love to consider upgrading to make an even bigger difference!

### Exercise

Review your monthly donors. How many have been giving monthly for less than 6 months? How many have been giving monthly for more than 6 months? How many at each giving level? That will give you a number to work with and help you determine the best upgrade and extra gift amounts to ask for.



## **88. Review Your Systems For Upgrade Options**

By now you're probably very familiar with your systems, but you may need to check how best to handle upgrades and extra gifts.

Can you easily upgrade donors? Do you need to direct donors to their personal giving account where they can upgrade, or can you take care of that for them? (If your donors use PayPal for their monthly gifts, they will need to do this themselves.)

In virtually all cases, when a monthly donor upgrades, to make sure the charges are handled correctly, you'll have to close the old monthly gift record and start a new one with the upgraded amount.

I totally support this approach, as it's the only way to keep things clean—and it will make it easier to create reports, too.

You can upgrade monthly donors by email, phone, mail, and, of course, through personal visits—and nowadays Zoom or other virtual and/or video calling options.

You can use virtually every approach we discussed in the acquisition stage to ask for an upgrade or an extra gift. Typically, how the donor joined as a monthly donor is most common and most comfortable for them, but so much has changed and multi-channel donors like multi-channel communications.

You will not know what works until you try! And the cost and time to do it is minimal. Your upgrade can literally be a version of something else, you're sending to other donors, using the same story.

Just remember my favorite word: repurpose! That applies here as well.



## **89. Ask Monthly Donor To Commit To New Amount**

You definitely want to make sure the monthly donor commits to the new amount.

I've seen some organizations do automatic upgrades. They send an email, and it asks: "Would you like to upgrade with, say, \$2 a month, yes/no." If you click, you've automatically upgraded to that higher level.

I've accidentally clicked on those yeses and was directed to a confirmation page. Then I had to figure out whom to call to change it back, because I wanted to undo the new amount.

While this may seem to work well from the fundraiser's standpoint, I do not think this is the best donor experience. Also, an organization might have received a higher upgrade if you left it up to the donor, by simply directing them to a page with several different amounts.

I first heard about this practice and my hair immediately started standing up straight! (And I have very curly hair 😊.)

I recommend you to be careful, because the last thing we'd want to have happen is that donors start complaining. That could ruin things for everybody!

Automatic sustainer upgrades are really all about the nonprofit. Netflix and other subscription services may do it, but they're not your organization. Giving is still a different experience.

But, if you're offering this, you're not only leaving money on the table; worse, you could jeopardize the future of monthly giving for you and other organizations!

The last things we need are concerns and complaints about older donors who are being "taken advantage of." We're walking a fine line here! (Just remember what happened with the donor in the U.K. several years ago—and the strict General Data Protection Regulation (GDPR) rules that were the result).

I know about automatic upgrades in the for-profit world. For example, when we put solar panels on our roof, we knew the annual percentage increase every year when we signed on the dotted line. I subscribe to Netflix and they send me upgrade emails every year. There's not much choice there, but I can say no if I want to.

So, *unless* your donor signed a pledge form when they joined agreeing to an automatic upgrade every year of a certain amount, I advise against automatic upgrades.



Monthly donors who commit and know what they're doing when they join are going to stay with you much longer, and they'll have a much better sustainer donor experience. You'll get far fewer complaints!

Why would you even want to do an automatic upgrade? You're much better off sending a letter, sending an email and making a phone call asking for the upgrade—and you'll get a lot more money.

Let's look at an example. If you have 5,000 monthly donors and you get a \$2 automatic upgrade, that's \$120,000 a year more. Yes, it's a lot of money. But how many monthly donors cancel when they receive the email or the letter that you've automatically upgraded their gift?

Instead, with a special upgrade campaign, you can reach out to your monthly donors, thank them for their ongoing support and ask if they're willing to increase their gift. Here's what you can expect from some of the results I've seen to date:

If you send a letter asking for an upgrade, you can get 5 percent to give you \$8 more a month. With an email, you may get 1 percent of your monthly donors with email addresses to give you an upgrade in that amount. And if you call those you can reach, you may get 30 percent of monthly donors with phone numbers to give you \$8 more a month. Based upon the same number of monthly donors, you'll be able to generate at least \$144,000 or so more money a year!

But better yet, you know that they're committed to this new amount. And you can update the credit card information you have on file, so retention will improve as well.

You'll still have to send them a thank you letter confirming their upgrade. Yes, the non-automatic upgrade is a little bit more work. And yes, it does cost a little bit of money, but it's a much safer bet for the future of donor experiences and overall monthly donor acceptance and growth!

**Note:** Automatic upgrading is not the same as auto-renewal. In essence, a monthly donor who gives via credit card or EFT “auto-renews” every month. Membership organizations that offer members to pay their membership in monthly payments typically auto-renew every year, but they’re definitely not automatically upgrading the amount they charge without asking the donor.



## 90. Ask Monthly Donors For Upgrade Through The Mail

If your monthly donors came in via the mail, they may be very likely to upgrade through the mail. Also, you may not have email addresses for everybody, so the mail is still a very viable way to upgrade them to higher levels.

You can always include a special monthly donor upgrade link in your letter, asking them to go online, and some may do that.

Make the upgrade all about the donor, but let them know that things have become more expensive and you need their help. Can they upgrade with just a small amount? Use that one third rule of thumb here, so you don’t ask too high for the upgrade, but do give different options.

On the upgrade donation form, make sure you use the new amounts, so the donor knows what he or she is committing to.

If you’re offering check statements to some of your monthly donors, mail is the best way to try to get them to give a higher amount. Make sure they indicate the new amount.

Below and on the following page is an example of an upgrade direct mail approach.

Dear Leaders Club Member,

Without question, this has been one of the most difficult years we have faced. From the pandemic, to natural disasters and wildfires, to last month’s elections, we have been challenged to stay safe, stay vigilant, and to stay committed to the issues that matter most to us.

---

That’s exactly what we have done at the National Wildlife Federation, thanks to Leaders Club members like you. Driven by your enduring support, we have made real progress in conservation action, like the passage of the Great American Outdoors Act. We could not have achieved this tremendous success for wildlife without you beside us.

And we’re not done yet! *Critical challenges are still facing wildlife.* The escalating impacts of climate change and extreme weather events are ravaging habitats. More species than ever before are facing the threat of extinction. We must move now to rebuild and repair our nation’s conservation laws and policies, including those that govern clean air, clean water, and endangered species.

For all these reasons, and for all the wild animals and wild places you treasure, I’m asking you to please consider showing your leadership even more.

You can do that by making a special one-time year-end gift, or by increasing your support by just a few dollars each month. You’ll find a space on your enclosed statement where you can deepen your commitment to wildlife.

---

With your continuing support, we will keep growing our Garden for Wildlife programs across America ... keep standing with our tribal partners to defend America’s last great wilderness ... and keep providing exciting opportunities for our children and grandchildren to get out into nature and become passionate stewards of our great natural heritage.

Source:  
Leaders  
Club, National  
Wildlife  
Federation

One approach you can consider is creating a simple version of your monthly donor invite appeal or update. Instead of asking for a join, you can ask for an upgrade on the reply form. You have the story and you have the different segments. It's as simple as a laser version.



**HEIFER**<sup>®</sup> | *Friends of Heifer*<sup>®</sup>  
 Heifer International  
 P.O. Box 8058  
 Little Rock, AR 72203-8058  
 888.5HUNGER

**Congratulations** on your Friends of Heifer anniversary! Thanks to your generous support, families in desperate need have received the animals and training necessary to transform their lives. We are truly grateful for your commitment. Please continue the journey with us.

*And if you want to increase the size of your **Friends of Heifer** monthly pledge to do even more to help struggling families lift themselves out of poverty, please let us know by calling 888-5-HUNGER.*

**Multiply Your Giving!** Find out if your employer will match your donation at [Heifer.org/matching](http://Heifer.org/matching)

Source: Heifer International Upgrade appeal

## 91. Ask Monthly Donors For Upgrade By Phone

There is still a wonderful place for the telephone, when it comes to fundraising in general—but especially for monthly giving.

For those organizations that are using the phone to generate new monthly donors, a call to ask for an upgrade can be very successful. The phone allows for time to say thank you and show your gratitude for past monthly gifts.

It also offers a great way to tell the donor about successes they've made possible which then makes for an easy transition to ask for a monthly gift upgrade.

Used in combination with a targeted direct mail and email upgrade campaign, the phone can help double or triple your upgrade results.

Just like a special Monthly Donor Drive, you could consider using a special month for an integrated monthly donor upgrade campaign.

I've seen organizations do this successfully in February for example. They primed the monthly donor with a nice tax letter in January, and then followed it up with a personalized approach.

Also, if you're able to offer EFT/ACH, an upgrade phone campaign allows you to ask for a conversion. The positive impact on your monthly donor retention can be considered an upgrade, as well!

Use the phone whenever possible. It allows you to gather information in the most personal way. And it is simply the best way to negotiate upgrade amounts.

Finally, because your organization already has a relationship with the monthly donor, if the tele-fundraisers are well trained, the pressure may be less about bringing in gifts, and more about getting to know monthly donors.

It's okay to have longer calls; they can do very well. Just "pretend" that whoever is

making the call is part of your organization. For upgrade calls, I would give preference to those agencies that can do manual calls. The numbers are smaller and calls can be longer. But they will be worth it.



## 92. Ask Monthly Donors For Upgrade By Email

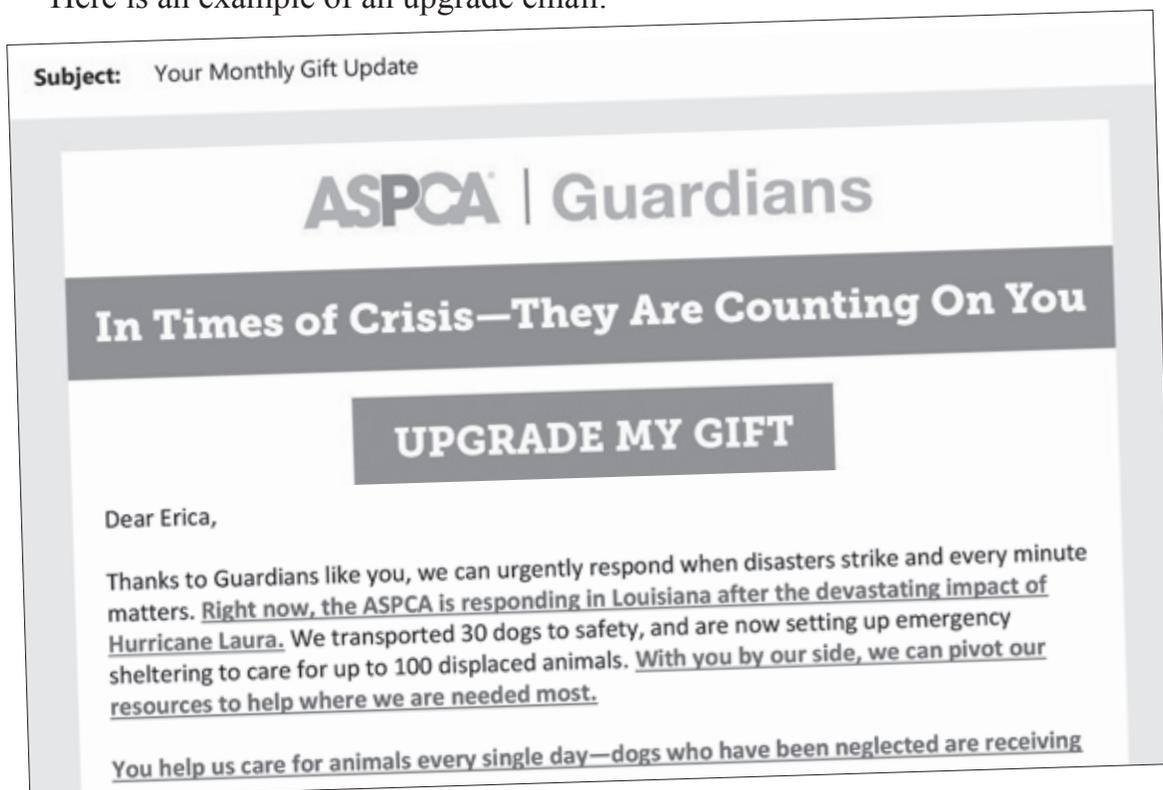
It's crucial to test your upgrade processes first, before you go all out with emails asking monthly donors for upgrades. You want to know where your monthly donor goes and it's crucial that everybody knows it's an upgrade. You want to prevent double charging.

You also want to make sure that the thank you indicates the new amount, so test that first. (See an earlier chapter on confirming any change in writing).

Upgrade asks do work via email. You typically ask for a relatively small amount and then lead the donor to the upgrade form where they can click into their preferred new amount and preferred method of giving.

Some systems will allow you to prepopulate the donor's information; with others you may not be able to so. Don't let that deter you.

Here is an example of an upgrade email.



Source:  
ASPCA  
Guardians  
upgrade email



### Exercise

Segment your online monthly donors by date of join; test a small group and see how they respond to the upgrade request. What is the open and click through rate? What is the upgrade rate?



### 93. Ask Monthly Donors For Extra Gifts

In the earlier days of monthly giving, it was very much a “set-it-and-forget-it” approach. Nonprofits worried that monthly donors would stop if they engaged them too much or too soon.

If someone tells you that they do not want to hear from you at all or not more than, say, once a year, of course you will flag that in your database.

However, most monthly donors will welcome the opportunity to hear from you during the year, and they’re even willing to make extra gifts, as long as it’s done right!

Make sure you send the thank you letter for joining right away.

Look at your communication schedule and see how many direct mail appeals you’re sending a year. How many email appeals are you sending each month? What do you have scheduled for cultivation and recognition. How often could you consider an extra gift via mail or email?

Here’s a good guideline that’s not going to feel like it’s too much.

- If you send print newsletters, include your monthly donors in all.
- If you send two appeals a year, include your monthly donors in both.
- If you send four appeals a year, include your monthly donors in all four.

If you send more than four appeals a year, which appeals are those your donors really love? Are you sending a calendar, a supporter card, notecards, a match appeal? Do you have a special project you really think your donors will want to support?

Then choose the best (and typically most successful) four appeals and include your monthly donors. And do include them in an appeal for a very special project.

Just think, wouldn’t a monthly donor, who is so very special, be upset if they didn’t know about a very special project?



When I say “do it right,” that means that it’s absolutely crucial to let the monthly donor know that they are already giving monthly—and make them feel special. You can do that by simply including a lasered or handwritten note or special intro in your letters.

And, if your appeals include a tick box asking for a monthly gift, remember to remove that option from the reply form.

Next, let’s look at your email schedule:

If you send email newsletters, include your monthly donors, with a special intro.

If you send monthly email appeals, include your monthly donors, with a special intro.

If you send daily or weekly emails, use your best judgement. Which ones are engaging, grateful, or important updates?

Any time you have a match, include your monthly donors, with a special intro.

If you send emails for Giving Tuesday and for year end, include your monthly donors, with that special intro.

That special intro and recognition is all part of the cultivation and engagement. As long as you do that, you can communicate with your monthly donors on a very regular basis. Probably even more than you think!

In fact, if you track the open and click through rates, you may very well find that they respond at higher levels. I've seen those rates be double!

A special laser message, special email intro, or a message of gratitude is really all it takes—not a lot of heavy lifting.

Here is an example of an extra gift ask for a special project with monthly donor recognition.

**Subject:** Alone, cold, and unloved: Send care to a neglected dog

**PETA**  **Sponsor a Doghouse**



**Send Love to a Lonely Dog**

Dear Erica,

Every dog deserves a comfortable home and a loving family's affection—but even on the coldest of winter nights, “backyard dogs” are still chained or penned outside, shivering alone.

**On these long, lonely nights, it can be a struggle just to survive. But today, you can help offer shelter—plus a little affection and love—to a dog who would otherwise have none.**

**Make a special one-time Valentine's Day gift to help sponsor a doghouse for a dog in need.**

**For many of these dogs, the love that YOU help us send to them may be the first kindness they've ever known.**

**Please, be a lonely dog's valentine today by sponsoring a doghouse.**

Of course, we want every dog to enjoy their family's love indoors this Valentine's Day. But if our fieldworkers aren't able to persuade an owner to bring a dog inside as part of the family, we do all that we can to make that animal's life a little less miserable.

We rely on the generosity of monthly donors like you to help the animals who others have forgotten or neglected—and your gift can make a powerful difference for dogs whose only hope lies with caring people like us.

Source: PETA monthly donor extra gift email for dog house

**Exercise**

Create a little monthly donor intro you can use in your emails and direct mail appeals that will make your monthly donors feel so special they'll be happy to consider another gift.

**Case Study** **Alumnus Makes Multi-Million Dollar Gift To University**

If you are worried that monthly donors do not upgrade or give extra gifts, worry no more. If you do your cultivation right, and you ask your monthly donors for extra gifts, especially for special projects, you may be pleasantly surprised.

One amazing story came from an educational organization: A donor made a \$10,000,000 gift to their university. Do you know how the donor started? As a \$5 a month alumnus donor! Of course, this didn't happen right away, but the potential is there. You will not know until you try!

 **94. Ask Monthly Donors For A Legacy Gift**

Now that you have generated new monthly donors, what's the next logical step? You ask them to make a gift from their will, consider a legacy gift. You see, one of the biggest myths about legacy giving is that legacy donors must be wealthy!

That's where monthly donors come in. They typically are not wealthy now (or they don't think they are). They are not typically able to write the big checks. But if they pass on, they may very well have the assets to donate to you.

My British friend Richard Radcliffe of [www.richardradcliffeconsulting.uk](http://www.richardradcliffeconsulting.uk) has been studying legacy gifts in the U.K. for many years, where monthly giving (committed giving/regular giving/direct debits) has been popular for much longer than the U.S.

Based upon his extensive legacy research in the U.K., and the fact that there's a service that reads every will in the U.K. (Smee & Ford), Richard was able to identify that monthly donors were 6 times more likely to make a legacy gift than one-time donors.

In the U.S., online will-writing companies are sprouting up—and I'm sure that more research will become available here that can confirm those statistics here.

Let's look at your own data! Of course, if you are still early in the early stages of your monthly donor program, you may not know yet. This exercise is worthwhile, just to see where your legacy donors came from.

**Exercise** 

Look at the last year or two of legacy gifts in your organization. Create a table. Include the first gift each donor made, the amount, and date. Include the last gift they made, the amount, and date. Include the legacy gift received. Include the number of gifts they made over their lifetime and their total amount. Then include if they were a monthly donor.

Create a benchmark, and then keep adding updated information every year. What does your table tell you?

Now that we've established that monthly donors are great prospects for legacy gifts, how can you 'plant the seeds' about your legacy program?

Look at the ways you communicate with your low-end donors and your monthly donors and add little messages when you can.

You should already have a special monthly donor segment in your donor base and your email program, so this next step should be very doable.

Include an insert in the monthly donor tax letter in January. Send a special appeal. Send a postcard. Include a message in every e-newsletter. Send a special email.

Here is just one example of the many things you can do.



*Create an estate plan that includes Sacred Heart Southern Missions and*

leave a beautiful  
**LEGACY**

- Educate a child out of poverty.
- Provide lifesaving aid to those in need.
- Decide where your assets will go.
- Ease or avoid conflict between your heirs.
- Reduce estate taxes.

Dear Fr. Jack,

Please send me a free copy of your booklet "The Ten Secrets of Effective Estate Planning" a fact-filled guide to help me with my estate planning.

I'd like someone to contact me; I have a few questions.

Name \_\_\_\_\_ Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Phone \_\_\_\_\_ Email \_\_\_\_\_

 Sacred Heart Southern Missions  
 P.O. Box 300 • Walls, Mississippi 38680  
 888.217.4829 • [www.shsm.org/plannedgiving](http://www.shsm.org/plannedgiving)

mobile phone or device:  
 You may also request online at:  
[www.shsm.org/10secrets](http://www.shsm.org/10secrets)

01004521

Source: Sacred Heart Southern Missions

Of course, I'm not telling you to forget about all your other (small) donors, but if you have limited time and budget, start with those donors who are already very committed to you, your monthly donors. What do you have to lose? 🌱



### **Organization Receives 70 Percent Of Legacy Gifts From Monthly Donors**

A religious nonprofit with a substantial number of monthly donors did an exercise looking at the gifts from wills of the past few years. They created a simple table as described in the exercise above.

As a typical religious organization, they were already used to seeing many small-size donors, and they saw that all their legacy gifts came from donors who started out with \$20 or \$25 as their first gift. They saw that their donors had made many small-size gifts during their lifetime. They saw that, in most cases, the donor's last gift had been a few years ago (so they were part of their lapsed groups).

What was most interesting: they then saw that 70% of legacy gifts came from donors who had been giving monthly before they lapsed.



*Great things are done by a series of small things brought together.*

– Vincent Van Gogh

## PART VIII



### CELEBRATE MONTHLY DONOR WINS



Source: Pixabay

#### 95. Congratulations

Wow, you've made it! Hopefully, you now know how easy monthly giving can be!

You now know the many ways you can grow, retain, and upgrade your monthly donors. With limited resources and just a bit of time and commitment, I'm sure you'll be able to come up with even more ways!



Make sure you build in regular times to celebrate your monthly donor wins. The more you do, the more monthly donors you will generate. Take a moment every month when you review your program to give yourself a pat on the back!

Then do yourself an even bigger favor and share the results with your boss, your board, your team. Don't just say, ha, we generated 10 new monthly donors. Say, we generated 10 monthly donors worth \$3,000! Congratulations, again!!

Unless you've personally seen and calculated it, others often don't understand how small donors can make such a difference to your mission. That's why it's important to continuously share your results and share the growth and power as often as you can! Trust me. It never gets old to share the results of your efforts.

Of course, this all started with your goals. You may have wanted to generate your first 25 monthly donors. You may have wanted to break through the first 100. Maybe your goal was to get to the next 1,000 sustainers.

Just take a look at this example of an organization that recently achieved that goal.

Perhaps your goal was to grow your monthly donor revenue to higher levels. You may remember, I always recommend at least annualizing monthly donor results so, perhaps, your goal was to get to the first \$5,000 or break through the next \$50,000.

In my almost 30 years of fundraising—that's half my life!—I've discovered there's something "funny" about goals. If you write them down, you typically achieve them.

Keep doing what you're doing and celebrate your small, consistent monthly donor wins. Slow and steady wins the race.

Just take a moment to look at the trends in your monthly donor program and pat yourself on the back! You deserve it! 🌸

### Celebrating 1,000 Faithful Sustainers

Erica,

Thank you for your ongoing support as a Faithful Sustainer. I can't begin to tell you how much your support means to us. Averaging \$20 per month, the collective impact of our sustainers is tremendous.

Over the past five years, **Faithful Sustainers have contributed \$1 million** to support UUA programs and mission priorities—work ranging from partnering with congregations in [ministerial transition](#), providing [resources and guidance for worship in a time of pandemic](#), confronting identify-based oppression with [Side with Love](#), promoting democracy through [UU the Vote](#), and much more.

This month Faithful Sustainer enrollment surpassed 1,000 active members for the first time ever!

**We're delighted to celebrate reaching this incredible milestone with you. As our way of thanking you for your**

Source: Unitarian Universalist Association





*The future depends on what you do today.*

– Mahatma Gandhi

*Optimism is sustainable when you keep coming back to gratitude, and what follows from that is acceptance.*

– Michael J. Fox



## DOWNLOADABLE RESOURCES

This book includes many examples. But rather than including assets you'd have to copy and recreate, I've created a special page on my website for easy download of all resources listed in this book.

There is no fee associated with it. In other words, these resources are FREE of charge to anybody and everybody who'd like to use them.

If you have any comments, suggestions, edits, or questions, please send me an email at [erica@adirectsolution.com](mailto:erica@adirectsolution.com). I can add and update my resource page very easily—so you always have the latest and greatest resources at your disposal and for your use and customization.

*The resources can be found at*  
**[www.adirectsolution.com/monthly-giving-made-easy](http://www.adirectsolution.com/monthly-giving-made-easy)**

*Or point your phone at the QR code below:*



*Don't be afraid. Be focused. Be determined.  
Be hopeful. Be empowered.*

– Michelle Obama



## ABOUT THE AUTHOR



Erica lives and breathes direct response and fundraising and can be considered a Philanthropyholic. Building partnerships and trying to find the best solutions for members and donors, and thus clients,' needs are what Erica does best.

Her multi-lingual skills and multi-cultural experience are of added value to those clients interested in raising money internationally, and her experience has given her an edge for those clients who are ready to embark on monthly giving.

Erica Waasdorp started A Direct Solution in December of 2003 with more than twenty years of experience in direct marketing, from both sides of the desk, client- and agency-side. She has since worked with numerous nonprofit clients on their appeals and monthly gifts.

Before starting her own business, Erica was Vice President Fundraising at DMW, a direct response fundraising agency in Plymouth, Massachusetts. She was responsible for new business development, strategy, and tactical execution, helping her clients raise millions of dollars by acquiring and retaining thousands of their donors—and starting and building sustainer programs.

She was with the International Fund for Animal Welfare (IFAW) for seven years, last as Marketing Manager of Planned/Committed Giving. She raised \$18 million a year (increased from \$5 million) and directed acquisition, donor, monthly, major-donor, and planned-giving programs in the US, Canada, UK, the Netherlands, Germany, Australia, and South Africa.

Her upgrade strategy for monthly giving in the UK won IFAW and their telemarketing agency the Gold UK DMA Award and the Gold FEDMA Award in 1998.

Prior to working at IFAW, she served several companies in the Netherlands, including Readers Digest, Kluwer Academic Publishers, and Reed Elsevier Seminars. Erica Waasdorp has a marketing degree from Limburg Business College in the Netherlands as well as a degree in public relations (from the Dutch Public Relations Association NGPR) and advertising from the International Advertising Association (IAA). Besides English, Erica Waasdorp speaks Dutch, German, French, and Spanish.

Erica Waasdorp is a member of the Nonprofit Alliance (Association for Direct Response Fundraising Counsel and National Catholic Development Conference), Direct Marketing Fund Raisers Association, Association of Fundraising Professionals, Philanthropy Partners of Cape Cod, Professional Face-to-Face Fundraisers Association, and the Direct Marketing Association of Washington.

Erica Waasdorp is a regular blogger for Nonprofit Pro, and she blogs, writes, and advises various direct-marketing and national and international fundraising publications. She regularly speaks at nonprofit conferences and workshops, ranging from fundamentals of fundraising to direct mail and from monthly giving to international fundraising.

Erica Waasdorp co-chaired the 2007 and 2008 Philanthropy Day on Cape Cod and the 2007 DMA Nonprofit Federation Conference in Washington, D.C. She served on the Education Committee for Philanthropy Day and the DMA Nonprofit Federation in Washington, D.C., for numerous years as well as the Bridge Conference in Washington, D.C. She hosted the first ever Sustainer Workshop and the first ever virtual Sustainer Conference.

Erica Waasdorp is an AFP Master Trainer and she regularly presents in person at conferences and workshops. She is also a sought-after webinar presenter for Charity How To and other online nonprofit training opportunities such as AFP, Chronicle of Philanthropy, Nonprofit Times, Donor Perfect, Qgiv, Bloomerang, Firespring, Top Nonprofits, and many more.

Erica published her first book on monthly giving, called *Monthly Giving: The Sleeping Giant* late in 2012. She finished a collaborative project with Donor Perfect in 2015, resulting in the *Monthly Giving Starter and Marketing Kits*, downloaded thousands of times by nonprofits all over the country. She created the *Monthly Donor Road Map* and numerous e-books, to include the *Top 7 Questions about Monthly giving*, *How to convince your boss to start a monthly giving program*, and the *Monthly Donor Retention Play Book*—and she is always working on new resources.

Between 2013 and 2018 Erica Waasdorp was US Ambassador for the International Fundraising Congress, held each year in October in Noordwijk, the Netherlands. 🌿



A DIRECT  
SOLUTION

**You can contact Erica Waasdorp, President, A Direct Solution:**

30 Frazier Way, Marstons Mills, MA 02648  
508-776-1224 | erica@adirectsolution.com | adirectsolution.com



