



**Growing your monthly
giving program**

Erica Waasdorp

**FUNDRAISING
FOCUS FORUM**

About Erica Waasdorp



- **40 years of experience in direct response and fundraising**
- **AFP Master Trainer. Presenter. Blogger.**
- **Author Monthly Giving. The Sleeping Giant &**
- **Monthly Giving Made Easy**
- **Monthly Donor Retention Playbook, Monthly Donor Roadmap, and more...**

A paved path leads through a lush green park, flanked by large, mature trees with thick, reddish-brown trunks. The path is made of light-colored paving stones and stretches into the distance, creating a sense of depth. The trees are dense, with their canopies forming a green archway over the path. The grass is vibrant green, and the overall atmosphere is peaceful and serene.

**The best time to
plant a tree was 20 years ago.
The second best time is now.”
- Chinese Proverb**

Today's highlights

- Why monthly gifts prepare you for a better future
- How to build in asks to grow your number of monthly donors
- How to keep monthly donors happy and giving



Definitions.

Monthly
Donors are
also known as:

Recurring donors

Sustainers

Committed givers

Regular givers

Specific names...

**How many monthly donors
do you have?**



Monthly donors are so...

Important



Because...

Reliable Revenue and More Money

Donors can give in a way that's comfortable for them

Younger donors like it

Efficient use of resources

Legacy gifts and thus lifetime value

Retention Rates improve

And more...



You can PLAN on unrestricted funds to be there no matter what!



Monthly donors will improve donor retention to higher levels



NEW DONOR
RETENTION RATE

-14.8%

YOY Change

13.7%

retained YTD



REPEAT DONOR
RETENTION RATE

-5.4%

YOY Change

41.5%

retained YTD



RECAPTURE
RATE

-15.0%

YOY Change

2.7%

retained YTD

Source: Fundraising Effectiveness Project through 3rd Quarter 2022, published January 2023

Donors want to help!



Monthly giving is very donor centric

- Gifts fit their budget
- Gifts are easy to make
- No matter their age
- No matter their background
- No matter where they are
- Mobile, desktop, mail



**What's the annualized value of
your monthly donors?**



The power of monthly giving

Number of Monthly Donors	100
Average Monthly Gift Amount	\$25
Average Monthly Revenue	\$2,500
Average Annualized Revenue	\$30,000
Average Revenue after 5 years	\$150,000

Monthly donors are your mid level donors!

- Worth \$300+ a year
- Your future bequest donors
- They will also support special projects and giving days

Source: M&R Strategic, Network for Good, Blackbaud Luminate Online Benchmark Report 2020 (2019 data)



Key elements for growth

Same as for one time
gift fundraising, with
small exception:

Ask for a monthly gift



Commitment



Systems



Tangible amounts




Storytelling

You have the tools and processes

- Donor base CRM
- Web site
- Payment Processor
- Thank you processes
- Emails
- Social media



Create a monthly donor only page



ABOUT US

OUR SERVICES


WHAT YOU CAN DO

NEWS AND EVENTS

Make a monthly gift to become a Hero of Hope

Your ongoing support will provide food, clothing, shelter, emergency financial assistance and more for those in need.

Thank you!



Yes, I'll make a monthly gift of:

\$5	\$10	\$15	¹⁸ \$20	\$25	\$35
\$50	\$75	\$100	Other		

Give on

Your first gift will occur on 3/1/2022

Source: Catholic Charities Archdiocese of Galveston-Houston

Make monthly giving stand out



YOUR KINDNESS MAKES A DIFFERENCE

Your gift will directly support the men, women and children we serve every day. Thank you for believing in their journey out of homelessness!

[Click here to donate stock.](#)

A monthly donation is the most effective way to help families year round.

One-time		Monthly
\$10	\$15	\$25
\$50	\$100	\$Other

Optional: Please indicate below how you would like your gift used.

☐ Yes, this is an honor or memorial gift



“
THANK YOU FOR BELIEVING
IN ME AND GIVING ME A SECOND
CHANCE WHEN NO ONE ELSE DID.
— AKENESE
”

Add button to home page

Donate Button



Monthly Donate Button



DONATE

*Bring healing and hope
across the world*

GIVE MONTHLY

*Light a candle at the
shrine every month*

Donate Button



Monthly Donate Button



DONATE

*Bring healing and hope
across the world*

GIVE MONTHLY

*Light a candle at the
shrine every month*



23%
In Recurring

* Based on a 46% statistical level of confidence


Source: Next After Nio Summit 2022




Add an extra button to your emails

From: Cynthia N. Colbert <hope@catholiccharities.org>
Sent: Monday, February 14, 2022 10:04 AM
To: Erica Waasdorp
Subject: A Valentine from us to you!

Happy Valentine's Day, Erica!

 [Make a Gift](#)
[Give monthly](#)

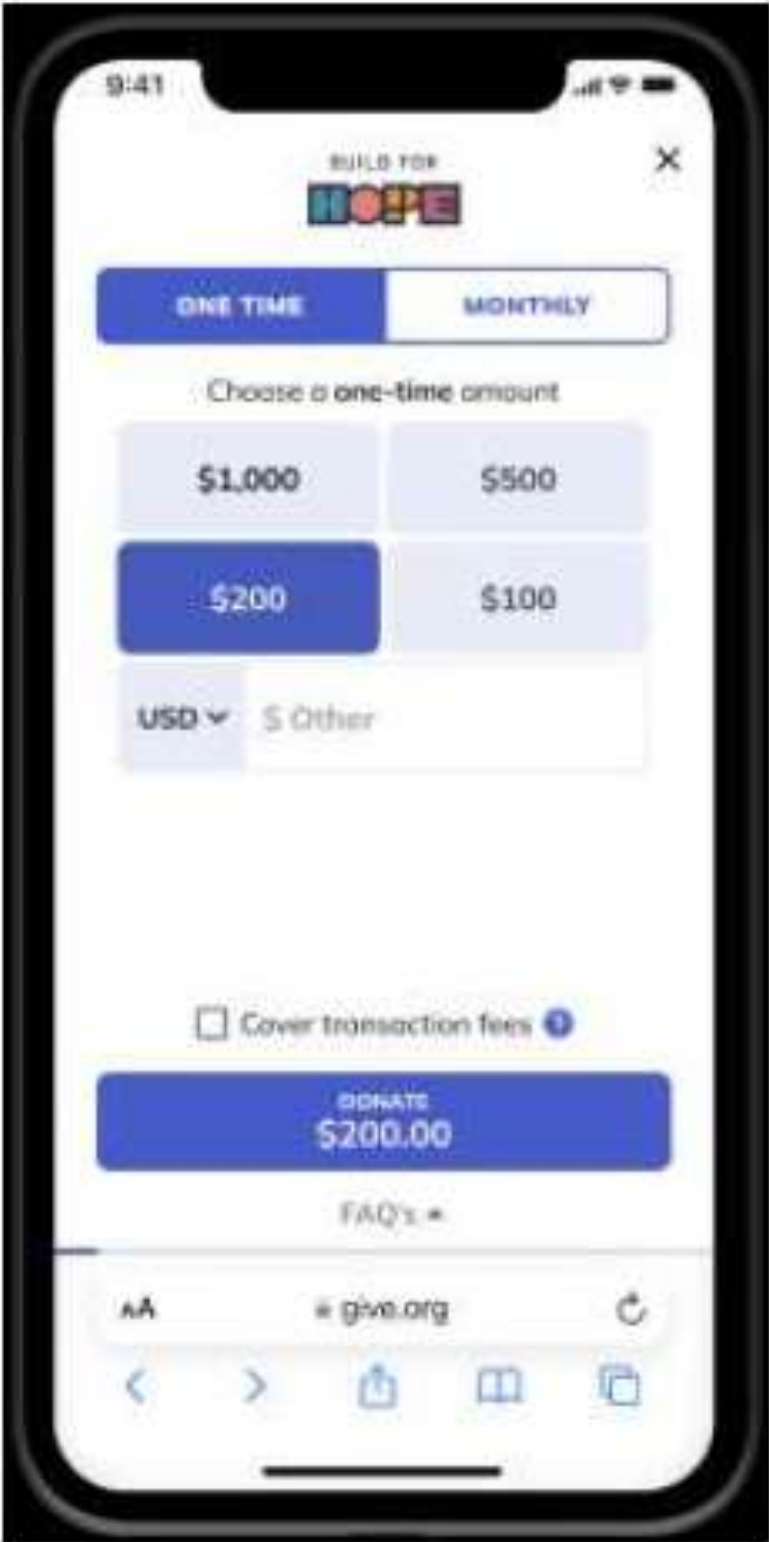


Click the image above to watch the video, or [click here](#)

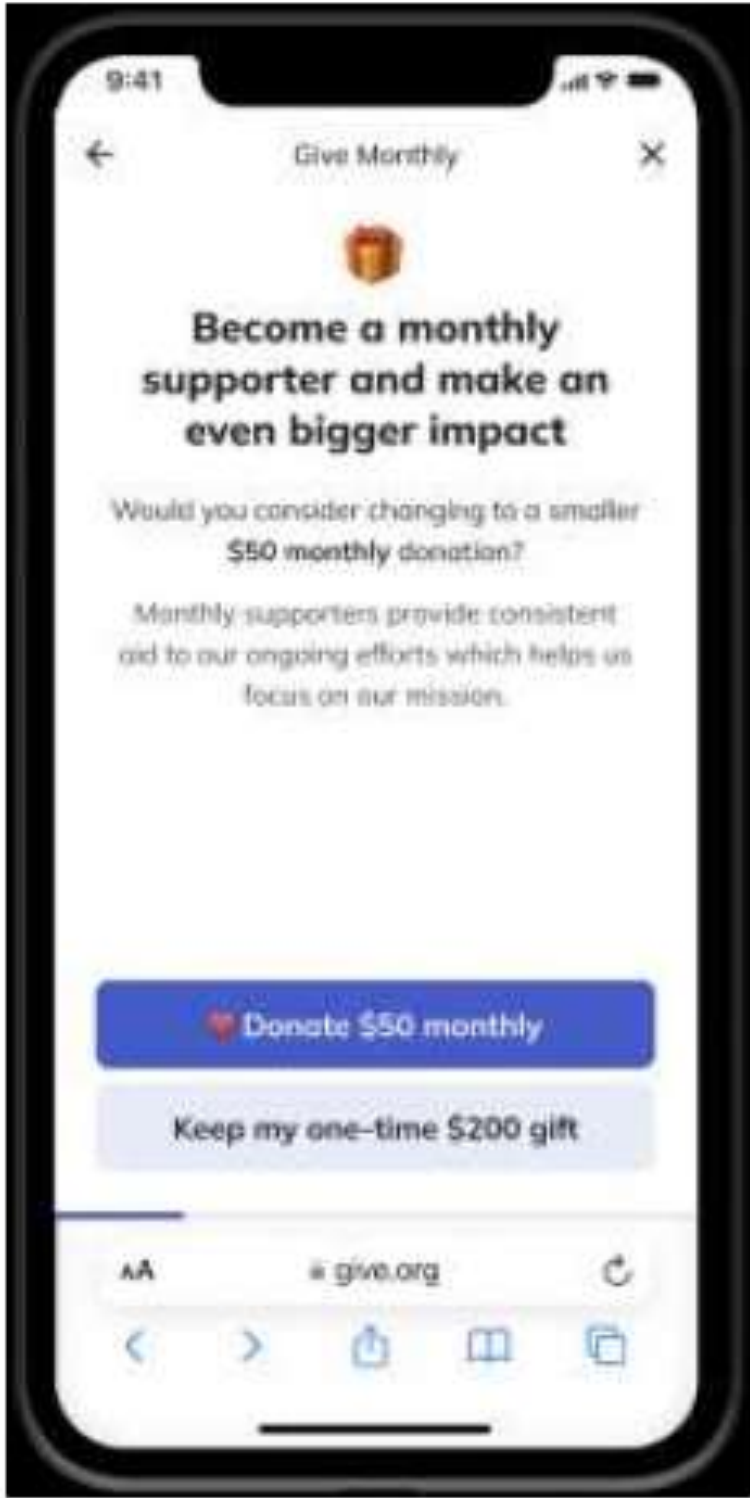
Dear Erica,

Roses are red,
violets are blue,

Monthly giving upsell popup



Source



Source: Next After Nio Summit 2022

**Use example amounts
to help the donor set
the price**



Source: Helping Up Mission, Baltimore, MD

**What is your biggest
challenge with growing your
monthly donor program?**

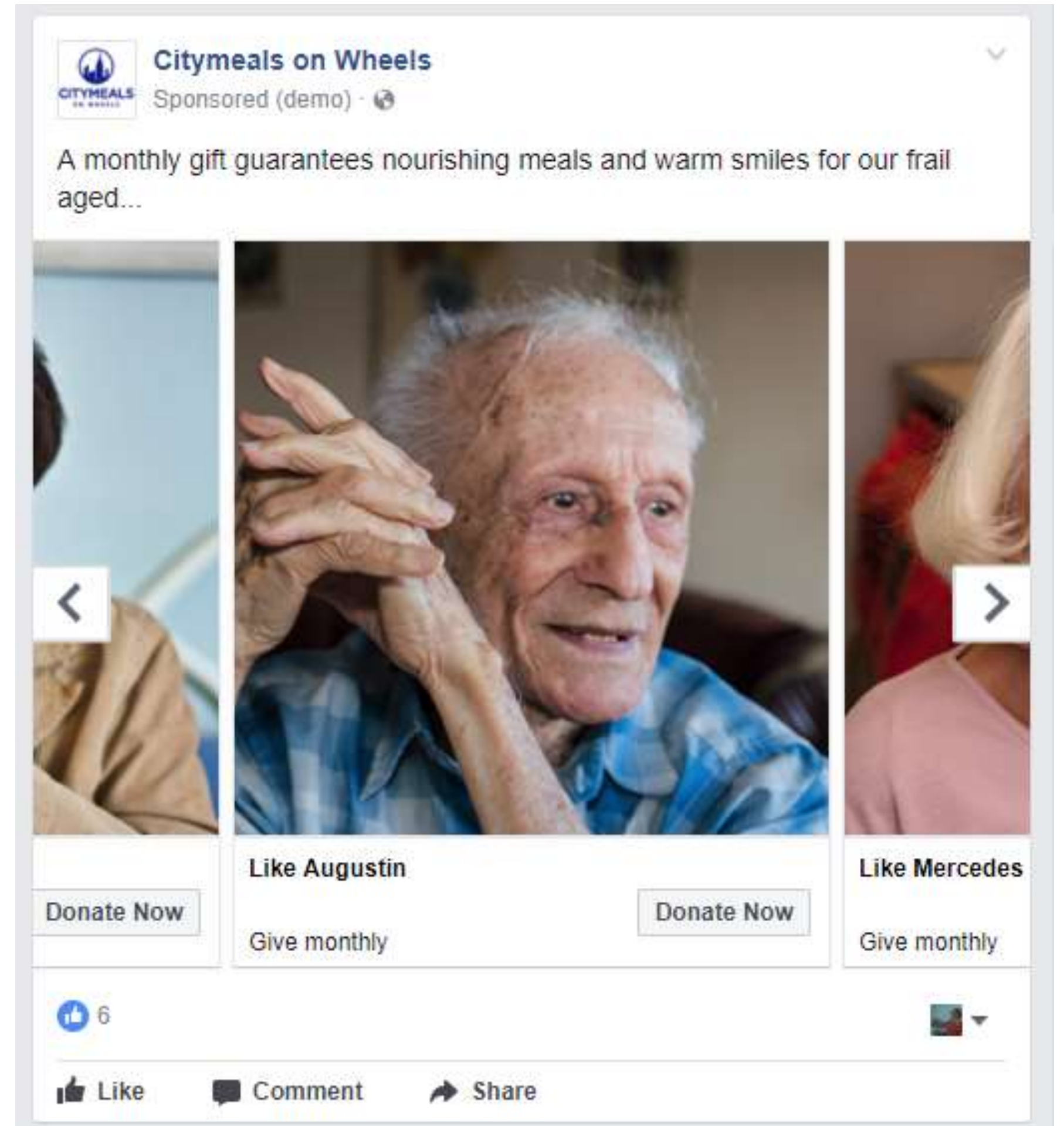
Use chat to answer





Growth and retention require accountability

Use short messages and powerful images on social media



Source: Citymeals on Wheels

Use your Google grants

Give Monthly to March of Dimes | **Donate as Little as \$19/Month**

Ad www.marchofdimes.org/DonateMonthly ▼

Donate Today to Help Improve the Health and Well-Being of Both Mothers & Babies. Your **Monthly** Gift Can Help Support Research into the Causes and Prevention of Prematurity. NICU Family Support®. Groundbreaking Research. Supportive Pregnancy Care.
[Plan Your Own Fundraiser](#) · [Shop Our New Gift Guide](#) · [Sign Up to March](#)

ASPCA® Official Site | Help Save Animals From Cruelty

Ad secure.aspca.org/Donate/SaveAnimals ▼

You Can Give So Many Animals a Second Chance At Life. Make a Monthly Gift Today. Open Your Heart and Help Abused Animals. Every Dollar Can Make a Difference. Save Lives Every Day. Help Animals in Need. Be Their Voice. Fight Animal Cruelty. Stop Animal Abuse.

Make a Monthly Gift

Help Save Animals from Cruelty.
Become an ASPCA Guardian Today!

Memorial Donations

Honor Those Who Have Passed by
Donating in Their Memory.




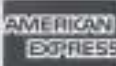
Pledge to Fight Cruelty

Pledge To Help Animals in Your Area
Live Happy and Healthy Lives.

Honor Donations

Celebrate Someone Special by
Making an Honor Donation Today.

Include monthly giving in Direct Mail

Please charge my tax-deductible gift of \$_____ to my credit card: ☐  ☐  ☐  ☐ 

Make this a: ☒ **Monthly Gift*** to provide blessings all year long. ☐ **One-time Gift**
*Your gift will be charged on a monthly basis and you may cancel at any time.

Credit Card#: Exp. Date: _____ CVV: _____

Name (as on credit card): _____ Signature: _____

Billing Address (for credit card): _____

Other Ways to Give:


- ▶ We accept **Donor Advised Fund** grants.
- ▶ You can donate appreciated **Stocks** to save on your income tax. Learn more at voa.org/stock-gift
- ▶ Satisfy your **IRA's** required minimum distribution and save on income tax. Learn more at voa.org/ira

Create a Lasting Legacy in Your Community

☐ Please send me information on how to continue the work of Volunteers of America through my estate planning.

☐ Please call me to discuss estate planning. My phone number is: _____
The best time to call me is: _____

☐ My employer offers matching gift funds. Enclosed is the appropriate form from my Human Resources Department.

 | **VOA**
125 Years Strong

Thank you for keeping hope alive in our community! Your gift is tax-deductible as a charitable contribution. All gifts received are used where most needed to help care for people in need throughout the year.

Combine it with things you're already doing



YES, I will continue to stand with EDF to protect the planet by renewing my membership:

One-Time Gift: ☐ \$35 ☐ \$55 ☐ \$70 ☐ Other: \$_____

Monthly Gift: ☐ \$5 ☐ \$7 ☐ \$10 ☐ My Best Gift Of: \$_____

2022 MEMBERSHIP RENEWAL FOR:

Ms. Erica Waasdorp
30 Frazier Way
Marstons MIs, MA 02648-1866



Your first 12 monthly gifts will be matched \$1 for \$1. Doubling your impact!

Please make your check payable to **Environmental Defense Fund**. For credit cards, please fill in the reverse side of this form. To expedite the processing of your gift, go online to www.edf.org/22Renewal or call us at 1-800-684-3322.

CON-7125536 QA M322R02 11

1875 Connecticut Avenue NW • Washington, DC 20009 • 1-800-684-3322 • www.edf.org

▼ DETACH AND RETURN TOP PORTION IN SUPPLIED ENVELOPE ▼

Add to your email signature to keep planting those seeds

Director of Advancement

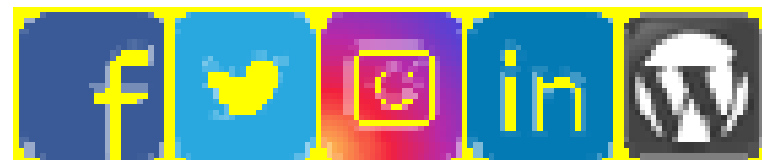
Big Brothers Big Sisters of Central Mass/ Metrowest, Inc.

Tel: 508-752-7868 ext. 12 Mobile: 508-505-8438

www.bbbscm.org

Be a ROCKSTAR!

Support Big Brothers Big Sisters of Central Mass/ Metrowest with a monthly donation starting at \$10 and make a long-lasting impact. [Click here to become a ROCKSTAR today!](#)



Retaining your monthly doors starts with stewardship

- Make them feel EXTRA special.
- Go above and beyond.



Keep stewardship simple and doable

2/15/21

Erica -

Welcome to the Hildegard House
Compassionate Care Circle! Thank you
for your generous monthly gift. You are now
part of our compassionate service -

Please let me know if you would like a
receipt at any time.

Thanks again!! You are a blessing ♥

PO Box 5613 Louisville KY 40255

www.hildegardhouse.org

Karen Cassidy Executive Director

2023 Recurring Giving Tax Letter template

Edit, Put on your letterhead, feel free to add a personal note

Include ALL gifts, not just the recurring gifts.

Provided by [www.adirectsolution.com](https://adirectsolution.com)

January xx, 2023

Donor Name

Donor Address

City, State ZIP

Dear *[name]*,

WOW. Thank you so much for your ongoing support and for your generous recurring gifts. As a special service to you, I am pleased to provide you with a record of all your gifts for your taxes.

Total amount of your donations to *[name of organization]* for calendar year 2022: \$xxxxx.

Your regular support truly makes a difference to the *[fill in a short focus]*. *Use a quote and/or story, to include impact of monthly donations on your organization*].

Thank you again for your continued support as a recurring donor in *[name of program]*!

Sincerely *[or your preferred greeting]*,

[Signature]

[Name of signer]

[Title]

P.S. If you have any questions about your recurring gifts, please contact me at *[email address]* or *[phone]*. Thank you again!

All donations to *[name of organization]* are tax-deductible within the extent of the law. *[Name of organization]* is a charitable nonprofit organization registered with the Attorney General in *[state]* with Tax ID *[tax id number]*.

Send a tax letter for all gifts for the year

Download at <https://adirectsolution.com/>

Engage your monthly donors in affordable ways

Hey Heartbeat Members,

In case you didn't see it in the Love Not Lost newsletter, **I am so very excited to invite you to our first Heartbeat connection this Friday at noon!** If you can't make this one, we'll send out the next invite more in advance once we get into our rhythm, but please know there's no pressure to show up if your plate is full.

We'll be doing these gatherings every quarter so you can ask questions, get the scoop on inside stories, meet other Heartbeat members, and hear from special guests throughout the year. We hope you'll be able to see first hand the impact you have and keep a pulse on events within our community.

As the heartbeat within our chest is necessary to sustain life and allow us to love, so is the heartbeat within love not lost. And just as you bring life and love to the community we serve, we hope to bring life and love to you too. These meetings are just one way we hope to do that.

We want you to know how much we love and appreciate you and look forward to seeing you soon.

Here's the private zoom link you are welcome to share with your household members who might want to join us:

Join Zoom Meeting

<https://us02web.zoom.us/j/86179674735?pwd=OTdxQityMHNVUTdRZ3J4NVJmTmRkZz09>

We'll send out a calendar invite as well.

With love and gratitude,

Ashley

Founder, Executive Director

Love Not Lost

www.lovenotlost.org

678-521-5068

www.HowCanILoveYouBetter.com

You can ask for extra gifts!

Recognize monthly donors

November 30, 2020

Dear Erica,

Good news has been hard to come by in 2020, but we've just received some. And because you are a monthly giver and one of our most committed partners, I thought you'd want to know.

A longtime friend of Helping Up Mission has reached out with a generous \$100,000 Matching Gift. And they're challenging friends like you to help match it by December 31.

Will you consider adding an extra amount to your monthly gift today? Through the Matching Gift Challenge, your special contribution will DOUBLE in impact.

Any amount you share doubles, up to the \$100,000, to reach our most vulnerable neighbors with hot meals, safe shelter, and the chance for a fresh start in recovery from addiction.

The timing of this Matching Gift couldn't be more perfect. The effects of this unprecedented year have left more people facing economic distress ... anxiety ... depression ... addiction ... and homelessness. And they urgently need our help.

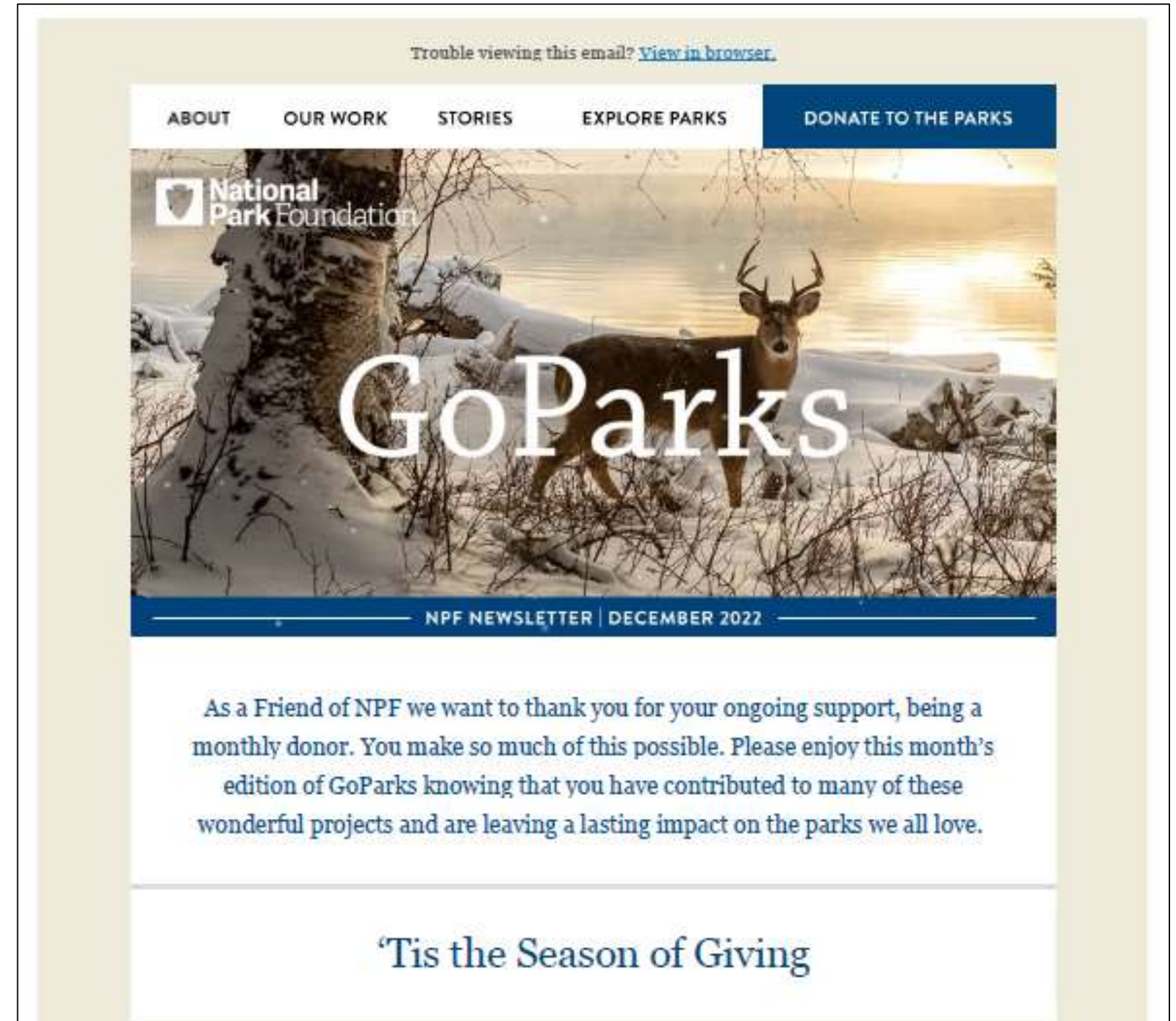
These are people like Allen, who had his first drink at age 16 and continued to drink for the next 22 years. "I just kept drinking every day," he says. "Eventually, I just wanted to be alone and drink. I didn't even want to hang out with my wife."

Allen's lowest point was when he blacked out while driving and crashed

(over, please)

**Have a special segment for
monthly donors.**

Then version your messaging.



Get the ultimate gift

- Monthly donors are great prospects for legacy giving
- They care deeply and are committed to your organization
- Add legacy buck slip or brochure in tax receipt
- Consider connection survey with legacy question

12. Gifts to NHES in wills or trusts are of enormous benefit. These gifts ensure that we will continue to be here for dogs and cats well into the future. It helps us to know if people support us in their wills or final plans.

- ☐ I have included NHES in my will or trust
- ☐ I intend to include NHES in my will or trust
- ☐ I am considering including NHES in my will or trust and would like more information
- ☐ I do not have a will or trust

Repurpose!

- Stories
- Messaging
- Videos
- Multiple channels
- Multiple purposes
- Repurpose. Reuse. Repeat.



**Happy monthly donors
will give even more
money and they will
keep giving.**





Keeping your monthly donors is a process

- Look at 'hard' cancels /voluntary churn
- Look at 'soft' cancels/involuntary churn
- Create a plan
- Track value of reactivation

Follow up as soon as possible and right away!



BEFORE CARD EXPIRES AND
AFTER CARD DECLINES



MAIL LETTERS OR
POSTCARDS



EMAIL



PHONE CALLS



TEXTS



REPEAT

**Track your monthly donors' value at risk
to keep as many as you can!**

	# of Monthly Donors at risk	Average gift	Average Yearly Gift	Cumulative
Totals	10	\$25	\$300	\$3,000

Be careful with payment platform changes

Take it slow

Keep following up

Remember the value!

Subject line: Can you do me a favor?

Greetings first name,

I hope that you are well! I'm very excited to let you know that your ongoing support has helped make a difference to [short accomplishment, e.g more than 1,000 kids last year]. We are so grateful for your monthly gifts as they've helped us develop new programs and [short accomplishment, e.g. get and keep more kids off the streets].

Today, I'm asking you for a special favor. We recently found a way to process donations in a way that will help save credit card fees and thus enable us to do more for the [clients/animals/children you serve]!

But, for security purposes there is no way to seamlessly switch from one payment system to another, so I have to ask you to sign-up again. Most of our monthly donors have already switched and they are very pleased with it.

So today, may I ask you to click here and continue with your monthly donation as a member of our [name of program, e.g. Sustainers Circle]?

You'll be able to use your credit card or debit card. And you'll receive an over view of your donations in January for tax purposes and other updates if you'd prefer. It's safe, secure and convenient and we'll know that the funds will be there to help [short goal, e.g. get more kids off the streets].

Thank you for helping us save valuable resources by joining the monthly Sustainers Circle right here.

[If you have something special you'd like to give as an incentive, you can do this right here. A gift is not necessary but optional. For example: As a special thank you for providing your updated information, I'll send you xxx.].

Thank you again!

Name
[name of program, e.g. Sustainers Circle Manager]
[organization name]

P.S.: If you'd rather call us with your information, just give me a call at (xxx) xxx-xxxx and we'll take care of it right away.

**Do everything in your
might to keep them**



**Monthly Donor Retention
Play Book**

Prepared by

Erica Waasdorp

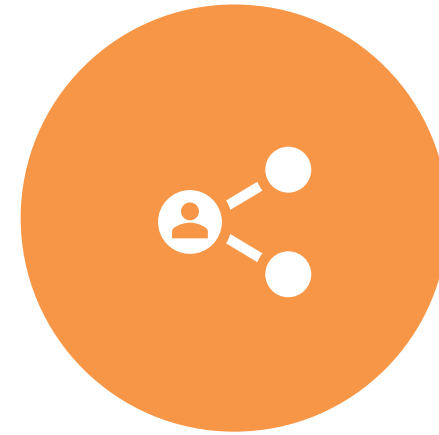
A Direct Solution

Download at <https://adirectsolution.com/>

Key Takeaways on growing your monthly giving program



Generating monthly donors is important and deserves focus (always annualize the revenue)



There are MANY tactics to grow your monthly donor program



Pick what you're comfortable with



Segmentation and stewardship are key

1700

**What will you do next to
grow your monthly giving
program?**





**“Great things are done by
a series of small things
brought together.”**

- Vincent van Gogh

QUESTIONS?



FUNDRAISING FOCUS FORUM

Follow up questions always welcome!



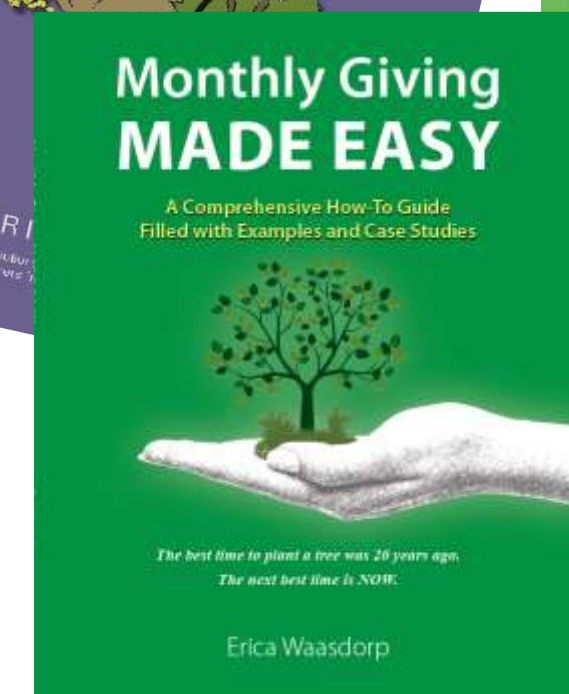
Erica Waasdorp

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