MONTHLY DONOR PROGRAMS 101
All you need to know...

Erica Waasdorp, President
A Direct Solution

About Erica Waasdorp
• Philanthrophoholic
• President, A Direct Solution
• Raised millions of monthly giving dollars
• Reader’s Digest ‘graduate’
• Author, Blogger, Presenter

Monthly giving is easy for you and the donor
It’s donor centric

- Gifts fit their budget
- Gifts are easy to make
- “Set and forget”

Donor Retention Rates improve

After…

90% EFT Donor Retention Rate

Sources: DonorPerfect users

They give more $$$

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Single gifts only (mail)</td>
<td>$58</td>
</tr>
<tr>
<td>Monthly gifts</td>
<td>$288</td>
</tr>
</tbody>
</table>

Source: M&R Strategic 2017
You already have the tools and processes

- Online donation options
- Donor base
- Thank you processes

Let's get your house in order

1. Assign the Driver
• One point of contact
• Oversees everything
• Is accountable

2. Start your engines

Engage everybody and everything
• Organize kick-off meeting
• Include Finance
• Include Communications and Marketing
• Include Data-entry
• Include web
• Include admin/fundraising
3. Create a name

Easier recognition

Naming examples:
- Sustainer
- Partner
- Champion
- Innkeeper
- Hope Builder
- Guardian
- Trailblazers
- Daisy Club

Naming do-not-dos:
- Legacy
- Society
- Amount in name (like $10 a month club)

4. Add monthly giving to your donation page
PayPal now has this monthly option standard

Add monthly option

5. Think of amounts you’d like to ask for
Small gifts are beautiful

Help the donor with examples

Don’t worry about fees

<table>
<thead>
<tr>
<th>Gift</th>
<th>$23 once</th>
<th>$252 ($23 a month)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finance fees</td>
<td>$0.37</td>
<td>$4.44</td>
</tr>
<tr>
<td>Gift value after finance fees</td>
<td>$22.63</td>
<td>$247.56</td>
</tr>
</tbody>
</table>
Fees can even be zero!

70% of donors pay for the fees if offered to do so

6. Create a monthly donation page

www.donorbox.org
7. Create auto-responder

8. Create email thank you message

Immediate

Subject line: Thank you!

Dear [Name],

Thank you again for your ongoing support for our [cause or program]. Your generous gift will be processed on the day of the month. This ongoing gift will help us continue our work to [cause or program].

If you would like to change the credit card on file for your monthly gift, please contact us at [phone number] or send an email to [email].

We are very grateful for your support and appreciate your continued commitment.

Thank you for being a Champion for [cause or program].

With my deepest gratitude,

[Signature]

[Quote: "The secret to success is having the power in your hands," by [Author]]

Thank you for being there!
9. Create a thank you letter

Yes, hard copy please

Do something unexpected
10. Create link from home page

Include in pull down
Go live, you’re halfway there!

11. Create first email

The value of monthly gifts

Source: MAR Strategic 2018 (based on 2017 data)
Use video

What Does It Take to Bring You BEST LENT EVER?

Join The Ambassador's Club

12. Use other email options
Use your email signature

Larry Little, President
Guardian Angel Basset Rescue, Inc.

“Senior Bassets don’t have the luxury of time – they need your help NOW!”
Help them now - donate $10 a month by joining Basset Friends Forever

Remind in email newsletter

You came. You donated. You rocked!
On behalf of the Arizona Gives participating nonprofits – THANK YOU for your continuous support and showing Arizona’s nonprofits your love and generosity.

Join our Circle of Hope Members who have already supported us in our goal to serve 100 women by contributing $25.00 or more monthly to Hope’s Crossing today!

Join Circle of Hope Now!

13. Charge the monthly gifts
Look at reports

- Verify that the system is 'charging'
- Some donor base systems you have to manually 'commit' the batch
- Others are done automatically
- Set one day a month to review
- Identify those that didn’t go through

14. Create flags for tracking and recognition

For stewardship and tax info
To do something unexpected

Thank you for helping to protect New England’s environment. This Earth Day and everyday we are grateful for your commitment and support. You make our work – and so much more – possible.

15. Add monthly donor to your donor base

16. Add payment to donor base
17. Generate report and share results

Always annualize value

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>100 One time gifts</strong></td>
<td><strong>$7,000</strong></td>
</tr>
<tr>
<td><strong>100 Monthly gifts</strong></td>
<td><strong>$25,200</strong></td>
</tr>
</tbody>
</table>

Source: 2018 M&R Strategic Benchmarks

18. Retain and Engage
Call to say thank you

Do a survey

Include in giving days messaging

That’s why I’m writing to thank you for your generous support as a [program name] member – but also to urge you to consider a special tax-deductible donation today for giving day...
Use what you have

Invite to special events

GIVING CIRCLE MEMBERS: DON’T MISS THIS SPECIAL VIP EVENT JUST FOR YOU!
Attention Giving Circle members! We’re hosting a special Giving Circle members-only mixer. May 3rd from 4:30-5:30 p.m., just before our monthly After Hours Event at Devil's Purse Brewing Company. This event is just for YOU, our wonderful Giving Circle donors. Connect with other Giving Circle members, hear from past grant recipients, and learn more about the collective impact of your

Ask for extra gift, especially matches and your strongest appeals
Prevent credit card drop outs

Pick up the phone

Create email with link
Create email with link

Don’t forget the letter

Consider credit card updater

Source: DonorPerfect
Never, ever give up!

Reactivate in next appeal

19. Set your goals and create a plan

Add ads and messaging to your newsletters
Share similar message on social media


Use social share and match combo

https://www.facebook.com/sfmfoodbank/videos/51556103712743073/

20. Celebrate your wins!
WOW!

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.

“...we exceeded our expectations for monthly donors and the matching donors’ funds have tripled that income.

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

- Lorraine

A monthly drip, ...

drip, drip, drip in a way that not only becomes a habit,
but gives the organization a chance to plan.”

- Seth Godin

Where will your monthly donors take you?
Questions?

Erica Waasdorp
A Direct Solution
Tel: 508-776-1224
erica@adirectsolution.com
www.adirectsolution.com