

Monthly Giving Marketing Kit



How To Promote Your
Monthly Giving Program



About The Monthly Giving Marketing Kit

This comprehensive guide is designed to help you attract new monthly donors and retain existing ones through awareness and engagement.

You can find Part 1 of the series, **The Monthly Giving Starter Kit Here.**

This Marketing Kit can help you:

- Prompt current donors to give monthly
- Retain your monthly donors
- Achieve increases in donors' monthly gifts

If you followed the instructions in the **Monthly Giving Starter Kit**, you're ready to spread the word about your monthly giving program using the tools and tips in this guide. **Let's get started!**

How to Set Up Your Monthly Donor Marketing Plan

If you want to grow your number of monthly donors, you'll need to do more than ask once a year. It's ongoing, and it takes time.

1 Craft your story.

Marketing your monthly giving program is all about telling your story. The goal is to bring a human touch and emotional element to a donor's participation in your mission. Your story should set your organization's mission apart from others and reflect the significant impact a single donor's monthly commitment can have on your success.

2 Incorporate your story and monthly giving asks in your communication plan.

The more you ask donors to join your monthly giving program, the more monthly donors you'll attain. Asking can be done directly or indirectly; email and direct mail are ways of asking outright, while social media posts and event invites keep donors engaged and aware of your efforts.

3 Establish a budget.

There's no standard budget plan for monthly donors because every organization is different. If you have 500 donors, your budget to market your monthly giving will not be the same as if you had 5,000 donors.

4 Ask low and you'll grow!

Ask, ask often, and ask low to get growing. By asking for a lower amount, your monthly giving program will welcome donors of all incomes, many of whom will eventually increase their monthly giving amount. For example, if you're a membership organization, you can encourage members who typically pay for a yearly membership up front to join as monthly members instead.

Rather than asking for \$45 for a year-long membership, ask for \$5 a month instead (\$60/year) with no end date of membership. By allowing members to sign up and receive their membership card for just \$5, you'll attract more donors who are likely to donate for life!

How to Write Marketing Copy Donors Will Respond To

Focus on your donors

Here are some buzzwords to use in your monthly giving emails, social media posts, landing pages, and anywhere you'll be writing copy related to your program.

You: Remember to always include donor-centric language in your marketing efforts. Personalized messages that use “you” rather than “we” will make donors feel like they're actively contributing and making a difference.

Easy: It's all about donor convenience.

Small amounts accomplish a lot: Your donor makes a difference. It's not the amount that counts-- it's the fact that your organization can count on their continued support.

Difference and Impact: Share how many lives are changed, puppies are saved, or meals are served through their generous support.

Join us: The donor is partnering with you on your shared mission.

Secure: You use secure, encrypted technology to always protect their financial information.

Thank you!: Say it frequently and genuinely.

Keep it simple

Don't muddle your message with legal jargon. Make your appeal all about inviting the donor to join your story through your monthly giving program.

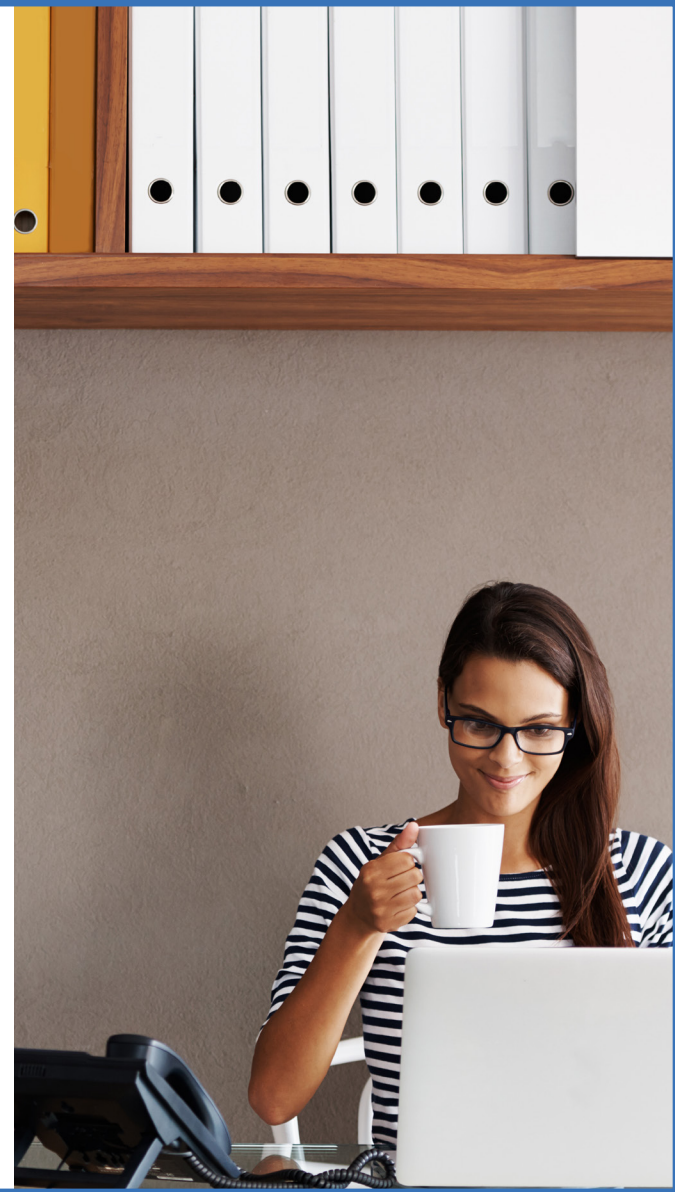
Use testimonials

Testimonials are extremely powerful. If you already have monthly donors, ask them why they like giving that way. Once you receive donors' approval to use their replies, display their testimonials on your website, newsletters, and emails.

"I love supporting Coral Acres Animal Rescue. It's so easy to make a difference by becoming a member. For less than a dollar a day, I'm changing the lives of animals across the country." - Jane S.

Add Urgency with a Challenge and Deadline

Essential to general fundraising, challenges and deadlines have proven to work exceptionally well in monthly donor asks. Ask your board or a donor to find someone who is interested in issuing a special matching donation challenge to help you grow your monthly donor program. Include a goal for the number of monthly donors you'd like to reach, and make sure it's realistic.



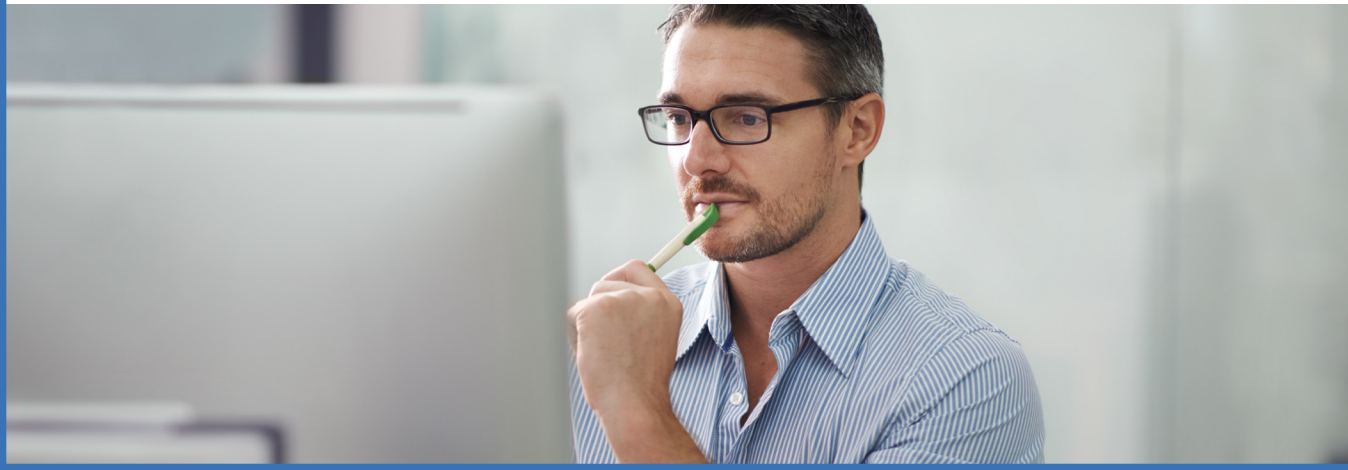


How to Promote Your Monthly Giving Program

Immerse your Website, Landing and Payment Pages

Monthly giving must be easy for the donor to find and join. If you followed the directions in the Starter Kit, you already created a Monthly Giving only web donation page. The three best ways to really grow your number of monthly donors from your website are:

- Make monthly giving prominent on your home page.
- Make the monthly donation form available from your main navigation menu.
- Make monthly giving the first option on your website's primary donation form.



Emails are terrific monthly donor generators!

Use this handy checklist to craft your monthly giving email.

- Personalized greeting
- Tell your story
- Pictures or video
- At least 3 links to your monthly giving program donation form
- Challenge, deadline, and a goal
- Specific impact of each donation amount
- A testimonial
- Short paragraphs, large fonts, 300-500 words
- Always say thank you!

Email frequency and timing

Every organization is different, but if you're serious about generating new monthly donors, consider sending your donors an email at least every month.

Segment your list

Small donors (less than \$100) are more likely to join monthly giving programs, so target those donors in your emails if possible. Make sure you start building a special monthly giving and major giving segment for future reference.

Here's an example of a monthly giving ask email that follows this format:

The screenshot shows an email layout on a laptop screen. At the top is the Coral Acres National Animal Rescue logo and a photo of a dog named Buddy. The text reads: "Give a dog like Buddy a bright future. Donate to Coral Acres today!". Below this is a testimonial about Buddy's rescue. A red "DONATE NOW AND CHANGE A LIFE" button is prominent. Underneath, a section titled "Every Amount Counts" lists three donation tiers: \$10, \$20, and \$50 per month, each with a list of benefits. The email concludes with a large "THANK YOU!" and a closing message: "Without your kindness and support, life would be ruff."

Amount	Benefits
\$10 a month	<ul style="list-style-type: none">• Gives a shelter animal:• A blanket• A month's worth of food
\$20 a month	<ul style="list-style-type: none">• Gives a shelter animal:• A blanket• A month's worth of food• A toy• 6 months of heartworm preventative medicine
\$50 a month	<ul style="list-style-type: none">• Gives a shelter animal:• A blanket• A month's worth of food• A toy• 6 months of heartworm preventative medicine• Annual vaccinations

Direct Mail

Hand delivered letters remain popular and are a highly successful way to communicate with your donors. If, like most organizations, you receive the bulk of your donations during the holiday season, consider sending an appeal to support your mission 12 months a year in January. The Monthly Giving Email Checklist above is designed to ensure your message is clear, concise, and engaging. That same checklist can also apply to direct mail.

Letters

Here are some variations of letters that can be used to ask for monthly donations (and upgrades)

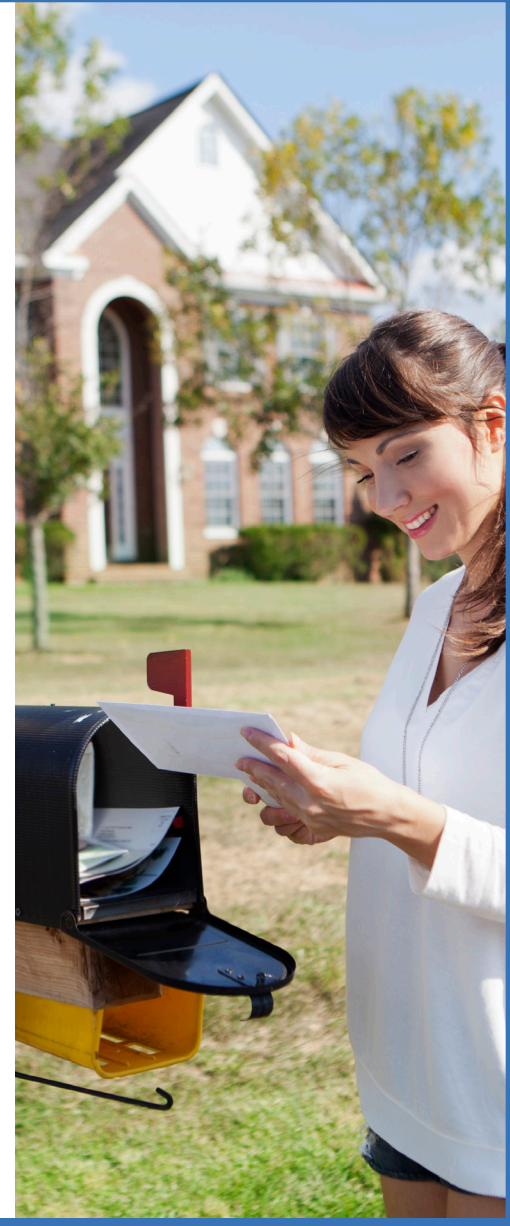
- Welcome letter for new donors
- Newsletter invitation
- Thank you letter
- Straight letter ask

Inserts, Brochures, and Newsletters

An insert can range in size and is typically included in a mailing appeal, thank you letter, or newsletter.

Brochure is usually 8½" x 11", folded in thirds. It's typically included with a communication piece you're already sending to the donor.

Paper newsletters should include a section that explains the benefits of your monthly giving program and a monthly donor testimonial.





Other Channels

Telephone

When talking to a donor, ask why they give, tell them how their gift is making an impact, and ask them if they're interested in a convenient way of giving. If they're already giving monthly, ask them if they're interested in upgrading their monthly gift.

Facebook, Twitter, LinkedIn, YouTube

Social media outlets can be used to keep donors in the loop about your monthly giving program's progress and how it's benefiting your cause.

Mobile text-to-give and crowdfunding

Be careful, many of these services charge huge fees and won't provide you with donor information. If you choose this route, only accept one-time donations and convert donors to give monthly by directing them to your website. Always make sure you're able to receive the donor information from the crowdfunding or mobile giving vendor.

Personal asks

Personal asks can be made by hosting mini-events at donor's homes during which you can invite attendees to join as monthly donors.

Fundraising events

Fundraising events offer the opportunity to ask donors to join your monthly giving program, but you'll likely see more success with follow up appeals after the event.

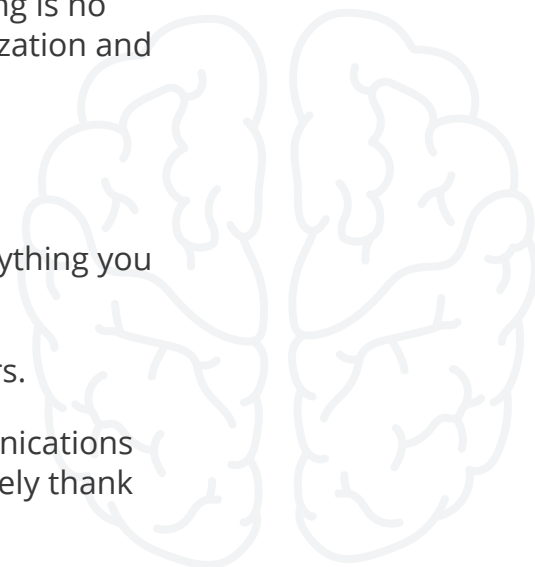
How to Engage Monthly Donors

Ongoing cultivation is crucial to any fundraising program and monthly giving is no different. Most monthly donors want to continue to hear from your organization and like seeing how their gifts make a difference.

Two important things to remember:

1. Segment monthly donors in your communications so you can track everything you do. Remember, you can't report on what you don't track.
2. Personal approaches work with all donors, but especially monthly donors.

Make sure that you include monthly donors as part of your overall communications plan. It is vital to continue communication with monthly donors and routinely thank them for their ongoing support.



Get Donors to Increase Their Monthly Gift Amount

Asking donors to upgrade their monthly gift helps improve their retention rate. Donors willing to upgrade are committed. Upgrades also allow you to check and update the credit card information you have on file

From a system and reporting point of view, we recommend that you stop the old monthly pledge commitment and start a new one that has an upgrade code with the new amount.

Asking for low upgrades will generate a higher response. Here is a guideline for your upgrade amount strategy:

Just like when asking donors to join a program, take 1/3 of the amount they're currently giving. For example, if a donor's current monthly donation is \$15, ask them to increase it to \$20.

- Consider some compelling reasons for upgrading (more food, more ways to help, etc.).
- Use a testimonial from someone who was helped thanks to the monthly donations.
- Identify those monthly donors who have been giving monthly for at least six months.

If you're focusing on those who joined online, send an email appeal asking donors to upgrade. Typically, the same channel you used to acquire a monthly donor works best for upgrading. For many nonprofits, the phone generates the highest number of upgrades since you can have a conversation.

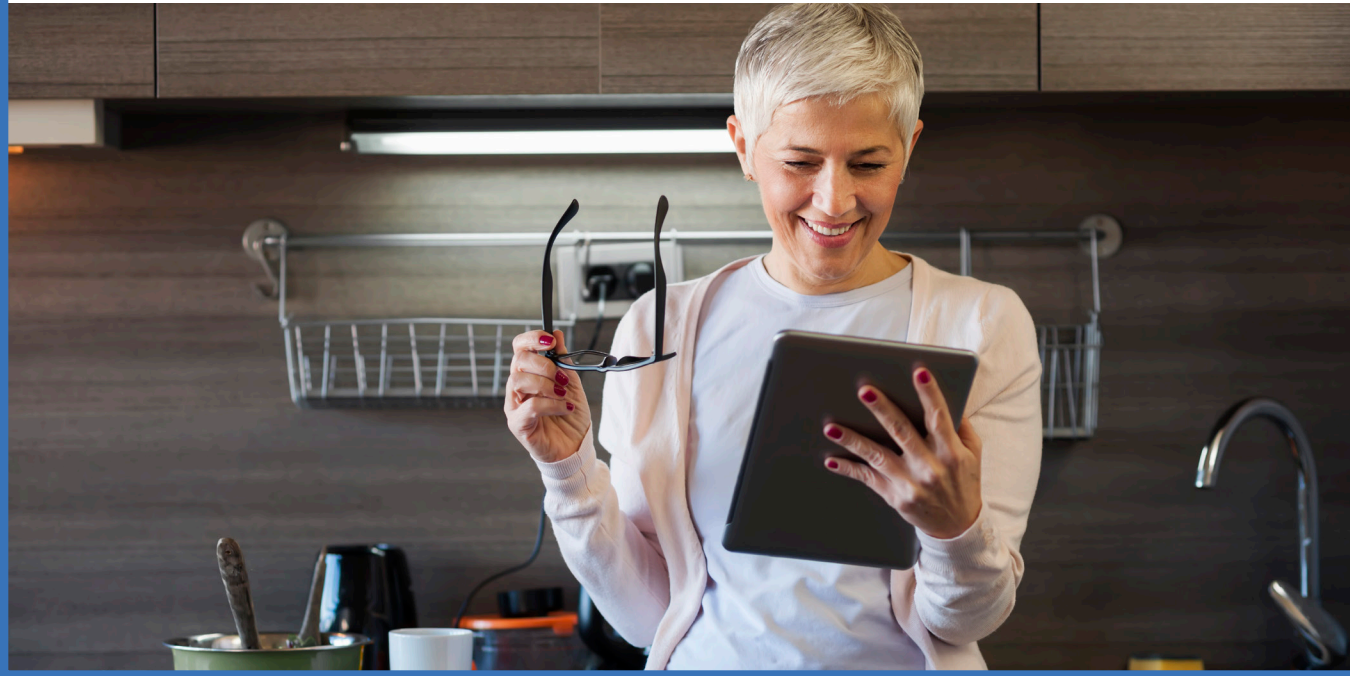
Get the Free Monthly Giving Starter Kit!

Now that you know how to gain and retain donors through your monthly giving program, make sure you kick it off right! Learn how to hit the ground running with part 1 of DonorPerfect's Monthly Giving Series, **The Monthly Giving Starter Kit**.



A Final Word

The Monthly Giving Marketing Kit was created to give you strategies so your organization can leverage the power of monthly giving. With DonorPerfect Fundraising Software, you can implement those strategies using smart integrated tools built for monthly giving. Visit donorperfect.com to learn more.



For More Information about Recurring Gifts

DonorPerfect Clients

If you would like to begin a recurring gift program and your organization is not yet set up with recurring gift processing through DonorPerfect Payment Services, please contact your Client Account Manager at **(800) 848-3279** or **clientsales@donorperfect.com**. They can send you all the necessary information and get you started!

Don't have DonorPerfect yet?

If you would like to learn more about DonorPerfect and DonorPerfect Payment Services, please contact your Regional Account Manager at **(800) 220-8111**, **monthly@donorperfect.com**, or visit our website at **www.donorperfect.com**.

For Additional Help Starting a Recurring Donor Program

Our partner and monthly giving expert, Erica Waasdorp, is available to discuss your particular program. In addition to tools, calculators, and a blog with ongoing tips on starting and growing your monthly donor program, her consulting services are aimed at generating long-term donors, who will generate sustainable revenue for your organization for many years to come.

Visit A Direct Solution on **DPCConnect**

About the Contributing Author

Erica Waasdorp, President, A Direct Solution

Erica Waasdorp is President of A Direct Solution, located on Cape Cod, Massachusetts. Erica lives and breathes direct response and fundraising and can be considered a Philanthropyholic.

She works with non-profit clients all over the country as well as internationally, helping them with their appeals and monthly giving. She is also the former US Ambassador for the International Fundraising Congress (IFC), www.resource-alliance.org

Erica Waasdorp published two books on monthly giving. Her first Monthly Giving. The Sleeping Giant, published in 2012 and Monthly Giving Made Easy, a How-To Guide, published in May of 2021. She created the Monthly Donor Road Map and several e-books to include the Monthly Donor Retention Play Book and many other resources. Erica is an AFP Master Trainer, and she regularly blogs and presents in person or virtually on appeals, direct mail, and monthly giving.

For more information, contact Erica at erica@adirectsolution.com or see www.adirectsolution.com

DonorPerfect gives you all the tools you need to engage, inspire, and retain your donors.

Designed to help your organization grow, DonorPerfect's core CRM system expands to incorporate growth tracks that support fundraising and donor management initiatives like online fundraising, donor engagement, fundraising events, donor retention, and more. From online giving solutions with integrated payment processing to email and mobile marketing tools to highly customizable reporting, DonorPerfect empowers your team to work better together on a single platform, learn what makes your donors move, and most importantly, cultivate the relationships that will make your mission a reality.

With DonorPerfect, you can manage donations, contacts, receipting, reporting, email, and all of your fundraising initiatives from the same system. Maximize fundraising results by tracking information about donors, prospects, volunteers, staff, and all your other constituents.

To learn more about DonorPerfect and Automatic Monthly Giving, please visit donorperfect.com/monthly, email monthly@donorperfect.com, or call **800-220-8111**.