

# Show Me the (Monthly) Money: How to Launch a Monthly Giving Program

Thursday, June 23, 2022 | 2:00 – 3:00 p.m. EDT



Donation Forms | Event Registration  
Text Fundraising | Peer-to-Peer | Auctions

# A Little Housekeeping...



## *We're recording this webinar!*

All registrants will receive an email containing a link to the recorded webinar AND a ton of other resources!



## *Feel free to ask questions!*

Use the Questions chat box to ask your questions. We will have a Q&A session at the end of the presentation.



## *Engage with us on social media!*

Share your highlights and takeaways with the **#qgivwebinar** hashtag, and please make sure to follow **@Qgiv**!



## FUNDRAISING TECH

# Made for you



### Designed with you in mind

Designed for fundraisers by fundraisers through customer-led development input



### Time saving data tools

Save time, attract and retain donors, and raise more money with all of your fundraising data in one place



### Powerful integrations

Easily integrate with your third-party CRM, email provider, and accounting software



*Rachel*  
**MUIR**

**SHOW ME THE (MONTHLY) MONEY:  
HOW TO LAUNCH A MONTHLY GIVING  
PROGRAM**

June 23, 2022

Qgiv

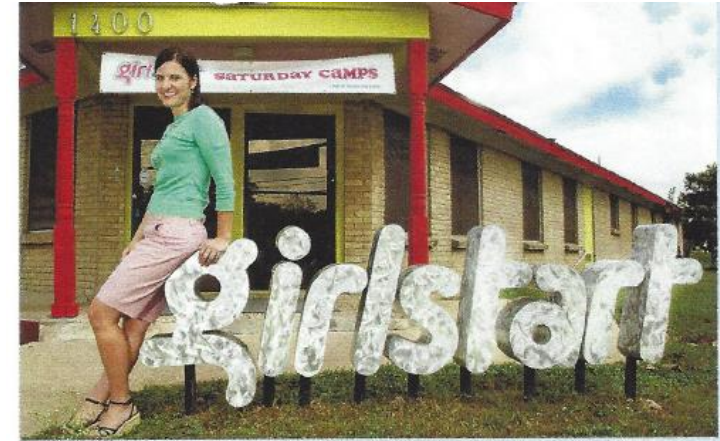


# Rachel Muir, CFRE

- Founder: Girlstart
- Featured on: Oprah,
- CNN, the Today Show
- AFP Outstanding Fundraiser of the Year
- What Rachel does: custom training, board retreats, online classes
- Weaknesses: chips, queso



@rachelmuir  
www.rachelmuir.com



A background image showing a person's hands typing on a laptop keyboard. The person is wearing a teal top. In the top left corner, there is a black mug with a white logo and some green papers. The overall scene is a close-up of a workspace.

**Speaker, trainer and nationally  
recognized non profit founder and  
thought leader.**

[GET TO KNOW RACHEL](#)

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# Show Me the Money: How to Launch Monthly Giving

# What is a monthly giving program?

- A regular, recurring monthly donation by a donor through credit card or EFT (electronic funds transfer)
- Often has name (e.g., “Friends of \_\_\_\_\_”)
- Marketed with tangible offer that explains long term difference (“\$25 a month feeds one child for a year”)
- Donors thanked and stewarded as special segment





1) Not doing it  
yet

2) Option on  
donation form

3) We have a branded  
program & do  
campaigns

# WHICH ARE YOU?

# If you DO have a monthly giving program...

Type in the name of your program and how many donors belong to it. *e.g., “The Bear Hug Club, 50 donors”*

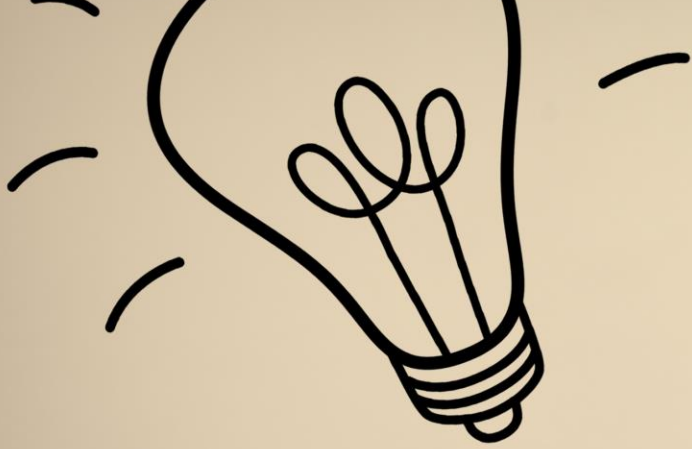


# Tell me more ...

**Give yourself 1 point for each item that describes you.**

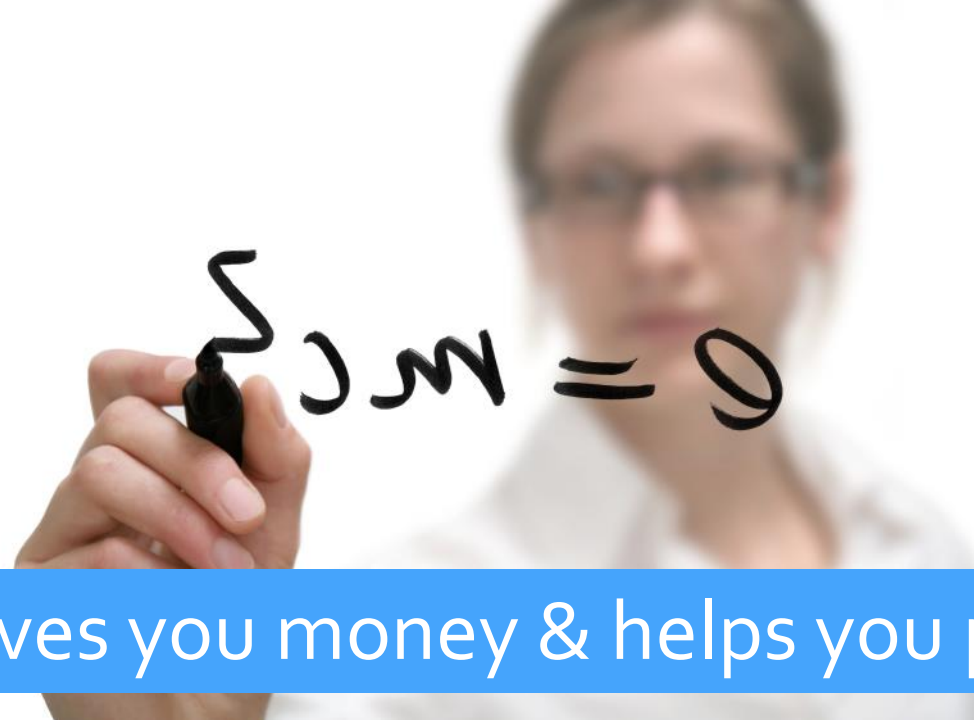
- Our offer is tangible, e.g., “\$29 a month feeds and shelters one dog.”
- We have a name for our program.
- I’m a member of our monthly donor program myself.
- New monthly donors get a special welcome letter.
- New monthly donors get a welcome phone call.
- We have a separate stewardship plan for monthly donors with one touch a month and we follow it.
- We review credit card expirations weekly (or monthly).
- We contact monthly donors 2-3 months before their cards expire.
- We have a monthly giving option on our online and offline donation form.
- We do email, direct mail and social campaigns focused on acquiring new monthly donors.
- We do campaigns to upgrade monthly donors after they have been giving at least 6-10 months.

Type in your  
score 0-11



WHY LAUNCH A MONTHLY GIVING PROGRAM?





Easy for donors, saves you money & helps you plan your finances

Cheapest form of fundraising (2-5 cents per \$1 raised)

Boost retention as high as 90%

Sustainers will give 2-4x more than one-time donors

Creates pool of planned gift & major gift prospects

Reliable, predictable growing source of revenue



# MONEY DRAINING MYTHS

# Myths & Truths About Monthly Giving

## Myth

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- Monthly giving is for big organizations, and it'll never work for us.
- That's for “young” donors (or “old” donors).

## Truth

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- Regardless of your size, you should be able to convert 10% of your donor file.
- 45% of worldwide donors give monthly.
- 40% of millennials and 49% of gen xers are monthly donors.

Fact: The avg age  
of your monthly  
donors will be  
determined by the  
recruitment  
channel you use to  
recruit them.



**How much  
should I ask  
for?**



Option A: Calculate your avg  
gift amount , divide by 3.  
e.g., Avg gift \$35 -> \$10

Option B: Try to 2x/3x  
donor's annual giving.  
e.g., for \$100/yr donor  
-> \$20, 30 or \$40/mo.

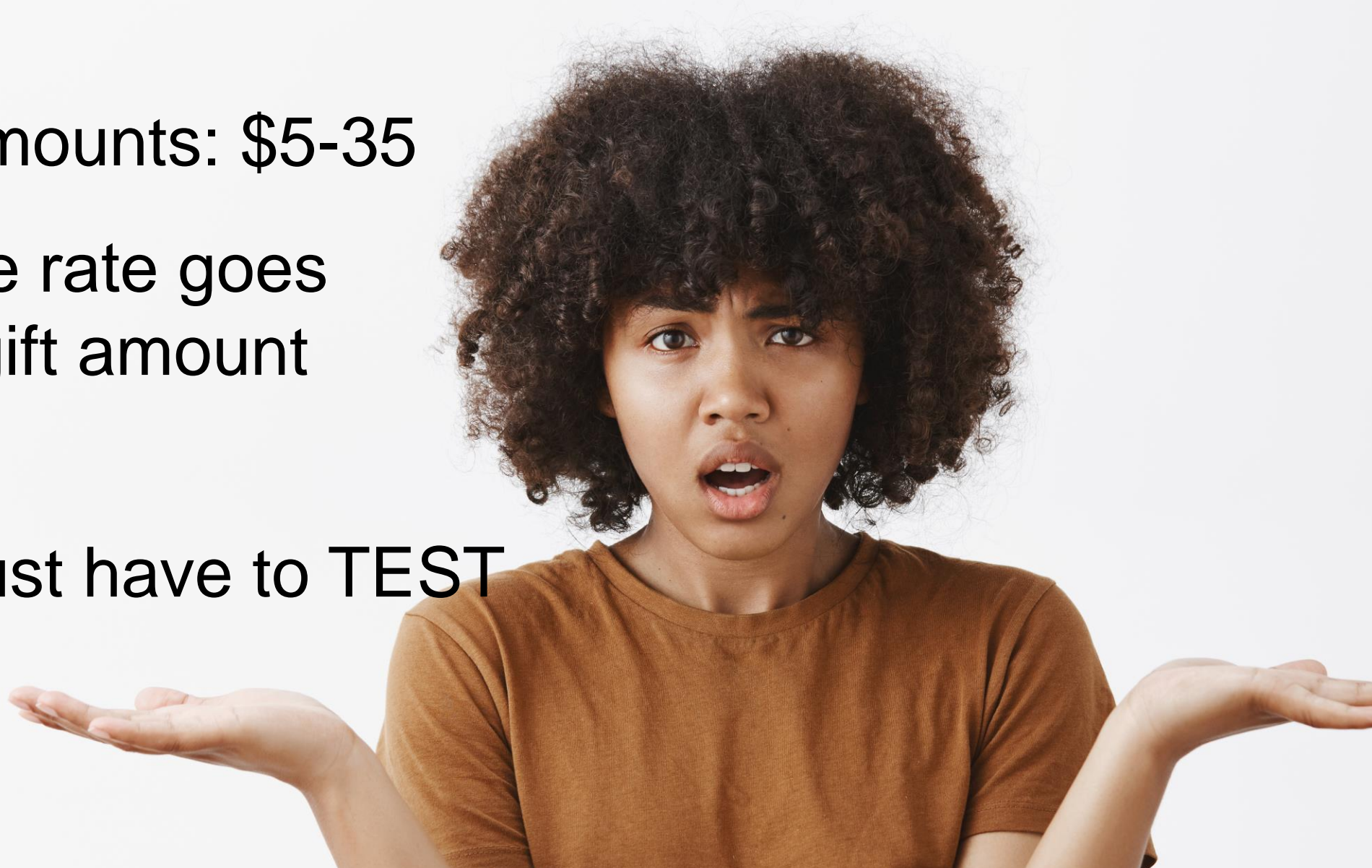
Test different  
giving amounts

# What are typical ask amounts?

Typical ask amounts: \$5-35

“The response rate goes down as the gift amount goes up”

Reality: you just have to TEST





When should I try to upgrade?

“After 6-10 months of monthly giving and learning how their gifts are making an impact.”

Source: Erica Waasdorp, Monthly Giving: The Sleeping Giant





HOW TO SELL IT

TO LEADERSHIP

A photograph of three children in a kitchen setting. On the left, a boy in a tan chef's hat with red polka dots and a matching apron stands with his arms crossed. In the center, a girl in a similar tan chef's hat and apron waves her right hand. On the right, a boy in a white chef's hat and white chef's coat with red trim stands with his hands on a counter. The counter is filled with fresh vegetables including red bell peppers, orange carrots, green dill, yellow onions, and a head of green cabbage. A kitchen knife and a metal spoon are also on the counter. The background shows a kitchen with white cabinets, a tiled wall, and various kitchen items like a glass jar and a string of garlic.

Charts

Charts w/\$

ROI

# How even a small program can make a difference in your bottom line

Mo. donors	Avg gift	Annual gifts	Total giving 1 <sup>st</sup> year
100	\$10	\$120	\$12,000
200	\$10	\$120	\$24,000
300	\$10	\$120	\$36,000

**AVERAGE**

**46%**



**FIRST-TIME**

**23%**



**REPEAT**

**60%**



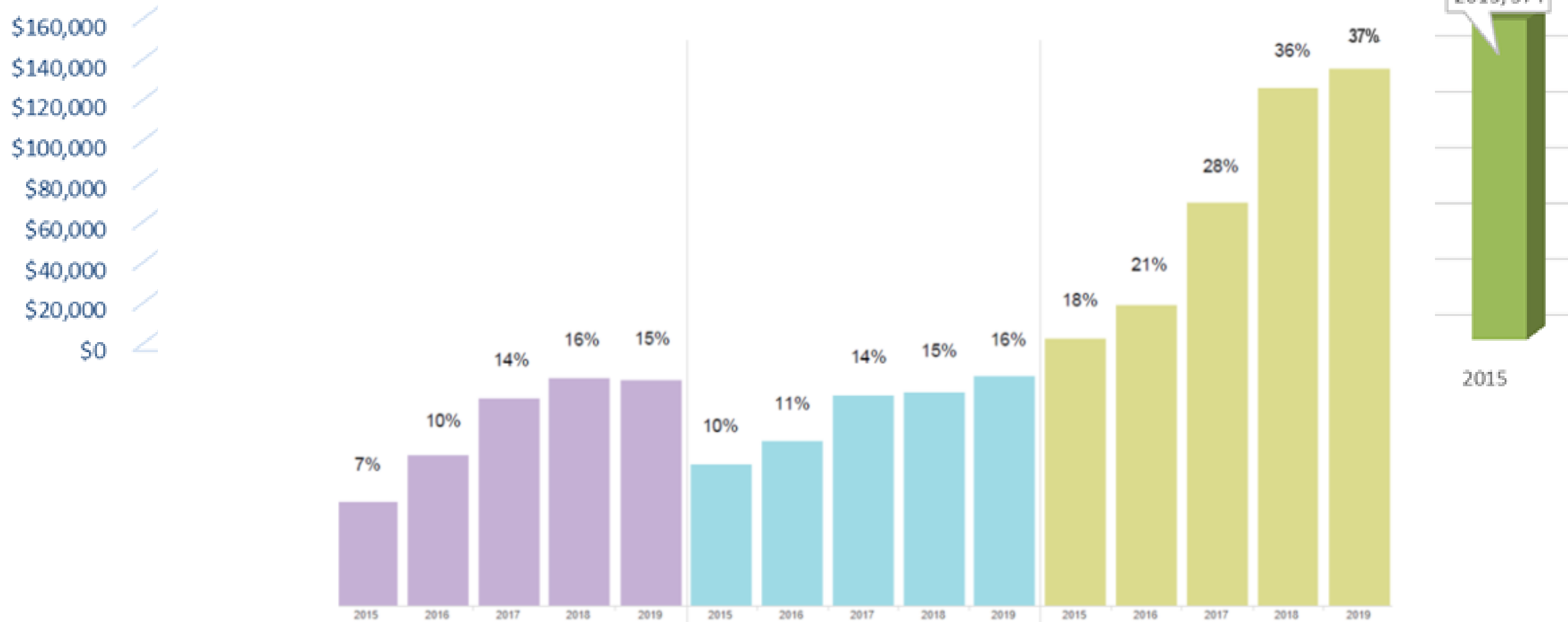
**MONTHLY**

**90%**



# Show annual results

## The Share of Sustainers Is Growing for All Program Sizes

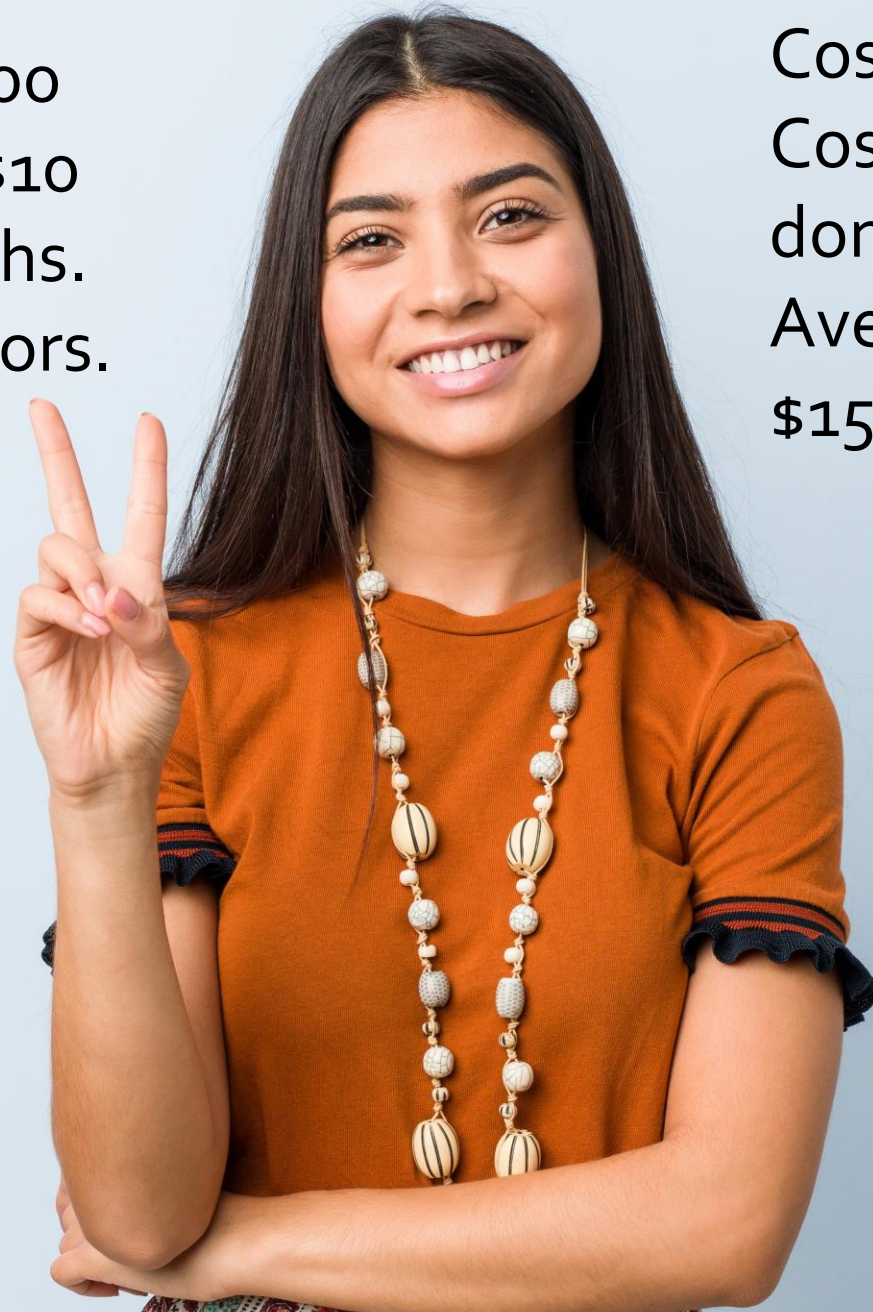


# ROI of fundraising strategies

Strategy	Cost per \$1 raised
Direct Mail Acquisition	\$1.15
Special Events	50 cents
Planned Giving	25 cents
Direct Mail (to house file)	20 cents
Foundations/Corporations	20 cents
Major Gifts	5 to 10 cents
Monthly Donors	2 to 5 cents

Source: Erica Waasdorp, Monthly Giving: The Sleeping Giant

Advocacy org sends test  
direct mail appeal to 1,100  
donors giving between \$10  
and \$100 in last 12 months.  
18 become monthly donors.



Cost to raise a dollar \$.07  
Cost to generate a monthly  
donor: \$54  
Average monthly donor gives  
\$154 a year.



WHO ARE YOUR BEST PROSPECTS?

# CURRENT DONORS

New or recent

Making at least 2 gifts  
over 18 months

Multichannel

Acquired by mail



Home / Fundraising Optimization Guide

FUNDRAISING

## Fundraising Optimization Guide

Raise more money through strategic targeting

### Opportunities

Increase retention	\$407K
Upgrade donors	-\$1.65M
Grow sustainer program	\$401K
Reactivate lapsed donors	\$92K
Identify planned givers	8

#### Sustainer growth potential

How is the default set?

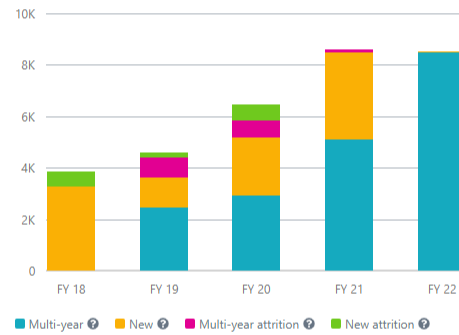
Reset

Grow your sustainer program by recruiting new monthly givers, reducing attrition, and upgrading existing commitments. If you bring in 2000 new sustainers, limit sustainer attrition to 5 % and Increase last year's average monthly gift by 5 % you could grow yearly recurring revenue to **\$1,130,000**, an increase of **\$401,000** from last year.

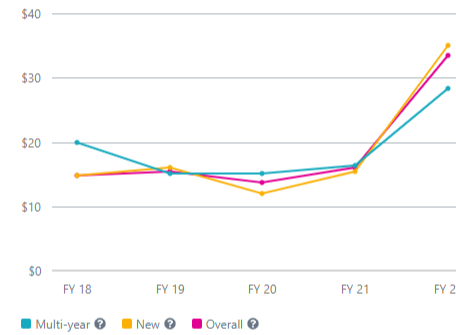
#### Sustainer program historical performance

Updated on a nightly basis

##### Sustainers



##### Average monthly contribution



#### Sustainer growth action steps

Conversion Invitation   Employ lightbox   Invest in upgrades   Attrition protection

##### Action to take

You have **26,887** donors who are most likely to become sustainers. Send them a regular invitation to convert.

Run the list



Become a DonorTrends Pro

Learn the ins and outs of the scores behind these recommended action steps

Show me how



WHAT'S IN A NAME?

**NAMING YOUR PROGRAM**

# Sample monthly giving programs

## Become a Freedom Fighter — Join the ACLU

People across the country are coming together to stand up for what they believe is right. Take your stand—help us as we:

- Take on voter suppression and mobilize people to vote like their rights depend on it
- Fight relentless attacks on reproductive freedom
- Reform our racially-biased criminal justice system



Over 1.84 million people support the ACLU.

Contributions to the American Civil Liberties Union are not tax deductible.

\* indicates required field

### DONATION

Type

☒ One-time

☐ Monthly

A monthly gift does even more to protect civil liberties ↗

# Sample names of monthly giving programs

Champions  
Advocates  
\_\_\_\_ Ally  
Friends of...  
Circle of ...  
Patron's Circle

Friends for Life  
President's Club  
\_\_\_\_ Partners  
Bear Hug Club  
Circles of Friends  
Carpenter's Club

Hospice Heroes  
Clean the Oceans Club  
HopeBuilders  
In This Together Crew  
Heroes Giving Hope  
Support Squad



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**DON'T OVERTHINK IT LIKE A KID STUCK AT  
THE TOP OF A SLIDE**



# SMALL SHOP GUIDE TO GETTING STARTED



# 7 tips to improve your monthly giving program

 @rachelmuir

 [Facebook.com/RachelMuirFundraising](https://www.facebook.com/RachelMuirFundraising)

Step one:  
Donate yourself.

“You haven’t made  
your own gift but  
you’re asking  
me to give?”





Drive traffic to your donation page  
(not homepage)



Make new monthly donor welcome calls  
**(easy win!)**

# Have different ask amounts for monthly gifts

OUR APPROACH

OUR PROGRAMS

REFERRALS &  
ADMISSIONS



FOR YOUTH

PROGRAM LOCATIONS

WAYS TO GIVE

A young man with short dark hair, wearing a blue and white plaid shirt over a dark t-shirt, stands next to a brown horse. The background is a blurred outdoor setting, likely a ranch or farm.

Make a gift to Idaho's  
most vulnerable youth

One Time

♥ Monthly

Your most generous donation

\$300

\$150

\$75

\$45

\$15

\$7

\$

USD

► [Add comment](#)

Donate and Support

## DONATE TO THE ACLU

The ACLU has been at the center of nearly every major civil liberties battle in the U.S. for over 100 years. This vital work depends on the support of ACLU members in all 50 states and beyond.

**We need you with us to keep fighting — donate today.**

Contributions to the American Civil Liberties Union are not tax deductible.

**UPDATE YOUR MONTHLY DONATION >**

**RENEW YOUR MEMBERSHIP >**

Different  
smaller ask  
amounts for  
monthly gift

1 Amount

Select donation type

One-time

Monthly

A monthly gift helps us respond to urgent threats and plan ahead.

Select or enter an amount to give

\$10

\$25

\$50

Other

☒ Sign up for ACLU emails to stay informed and take action to protect people's rights.

Choose payment method

Credit Card

Bank Account

\*US Bank Accounts Only

Tells me  
why monthly  
gift is  
needed

Option to do  
EFT which  
averages  
98%  
retention)

# Tips to improve a monthly giving program: pop-ups

## Strategy

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- Use a pop-up box on your donation form to invite donors to consider monthly giving

## Why it works

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- In one study, pop-ups increased recurring giving 64% (and didn't reduce 1-time gifts!)

# Sample pop-ups inviting you to convert to monthly gift

**Thank you! Your contribution is a Big Freakin' Deal!**

We have one last favor to ask -- will you make your donation weekly? Our top supporters do!



By clicking "Make it weekly", you are signing up for a weekly contribution until the election on November 3. You can cancel anytime.

Skip for now

**Make it weekly!**

**Drove 64%  
increase in  
recurring gifts**

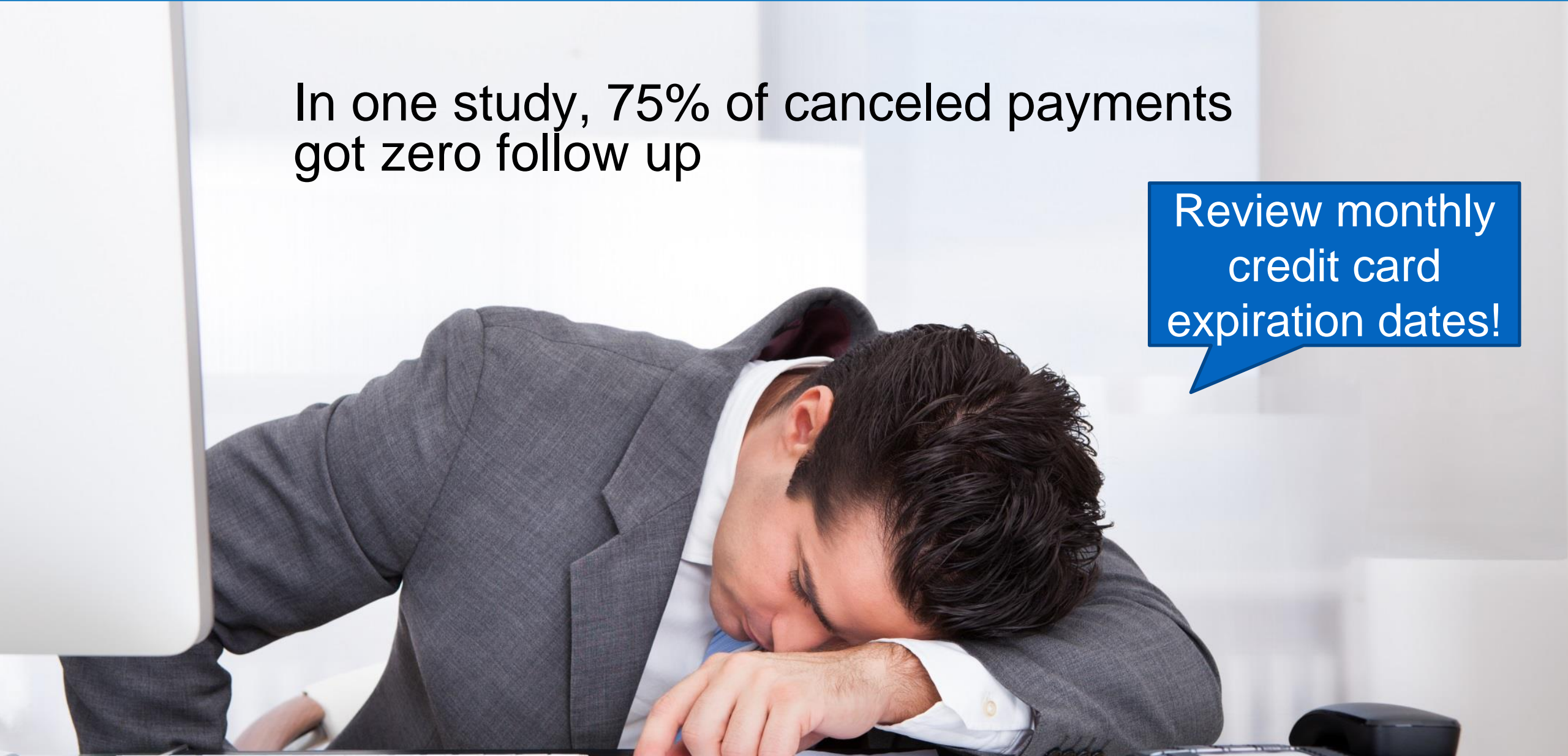
Christ by defending

ho need biblical truth

# Have a system to prevent & recover lapsed cards

In one study, 75% of canceled payments got zero follow up

Review monthly  
credit card  
expiration dates!





**STEWARDSHIP**

# Stewardship Ideas

1. Welcome call
2. Certificate
3. Welcome kit
4. Behind-the-scenes video
5. Client testimonial video
6. Handwritten note
7. Special update
8. Birthday card
9. Anniversary card
10. Photo with note on back
11. Video email
12. Inexpensive gift  
(bookmark, notecards,  
sticker, etc.)

 @rachelmuir



# Tips to improve your monthly giving program: EFT

## Strategy

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- Offer EFT as default
- When upgrading/updating info, try to convert donors to EFT
- Only 33% of orgs accept EFT payment

## Why it works

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- EFT relies on bank account information, which stays open 16 years (credit cards = 9 mo)
- Adding EFT doesn't decrease conversion and can boost lifetime value of donor 55%


# Offer giving through EFT Electronic Funds Transfer

EFT retention  
is 98%

## Step 4: Payment

Give By *PayPal*

Give By 

Bank Account Withdrawal 

Credit Card Number \*

CVV \*

MM \*

YY \*



BACK

DONATE





HOW TO UPGRADE



10-30% will  
upgrade

I Just Called,  
to Say,  
I Love You.

A smiling woman with dark hair, wearing a black blazer, is holding a black phone to her ear. She is looking off to the side with a pleasant expression. The background is a blurred office setting with a window showing greenery outside.

The need is growing (or there's a benefit to increasing)

They appreciate your stewardship

They're happy with how you are using their donations

They came in at lower level than their capacity

You asked

Donor Motivations for Upgrading

A top-down view of a person's hands writing on a spiral-bound notebook on a wooden desk. The notebook is open, showing a lined page. The text "EXAMPLES OF MONTHLY GIVING ASKS" is written in the center. The person's right hand is holding a pen, and their left hand is resting on the notebook. A cup of coffee is on the right side of the desk.

# EXAMPLES OF MONTHLY GIVING ASKS



Dear Dave and Laura,

### You are a life changer!

In 2021, you were kind enough to give young people a chance to overcome trauma and adversity and reach their full potential with your generous gift of LAST GIFT AMOUNT.

Your gift is already hard at work. Thanks to you, young people are already reporting an increased sense of hope about their futures and a belief that they have value.

That's huge! Hope for the future and feeling valued are two of the strongest indicators for life-long success—you made it happen.



### But that's not all you've done.

Many of the kids who come to Idaho Youth Ranch programs believe they are "bad kids." They've heard "What's wrong with you?" for so long that they genuinely believe that they have no worth—that they are broken.

When they come to Idaho Youth Ranch, we tell them that the programs that are helping them heal are only possible because of people like YOU!

Dave and Laura, knowing that there are people in the community like you who believe in them is tremendous. That's why the act of giving your gift is so powerful for kids.

### You are so important to Idaho kids.

That's why I'm writing to you today.

You have shown Idaho's kids that you are a champion for young people by giving them hope and the tools they need to define their own futures.

Because you believe in kids overcoming trauma and reaching their full potential, I'm sending you this special invitation today to join our monthly giving club, Team Appaloosa.

...please join us!  
see other side.....→



The state horse of Idaho, Appaloosas were bred by the Nez Perce as beautiful, independent horses. They are known for being good-tempered and loyal in most of their human relationships. However, they can be stubborn and aggressive if they feel like they've been mistreated—much like the kids you help at Idaho Youth Ranch.

That's why we chose the Appaloosa as the symbol for our monthly givers. Team Appaloosa is about helping strong-willed young people struggling to find their strength and resilience.

### Would you consider joining Team Appaloosa with a monthly gift of [last gift/5] today?

When you join our monthly giving club, you'll receive exclusive updates about the kids you are helping through a special newsletter. But, most importantly, you'll support vulnerable kids all year long.

By joining Team Appaloosa, you will tell kids every month that their lives matter and have worth.

Dave and Laura, you are one of the few people who truly understand that these kids' pasts don't define their future.

*Will you join our team?*

*For Idaho's Kids,*

Scott Curtis, LMSW  
CEO, Idaho Youth Ranch

Rachel's edit p.1:

Your gift says: I see you. You're cared for.  
You matter.

Or: Every gift you make says: I see you. You  
will be cared for because you matter.

PS: Your monthly gift of [LAST GIFT/5] will go immediately to work helping our kids. Can Idaho's kids count on your support?



Best Friends®  
**SAVE THEM ALL®**

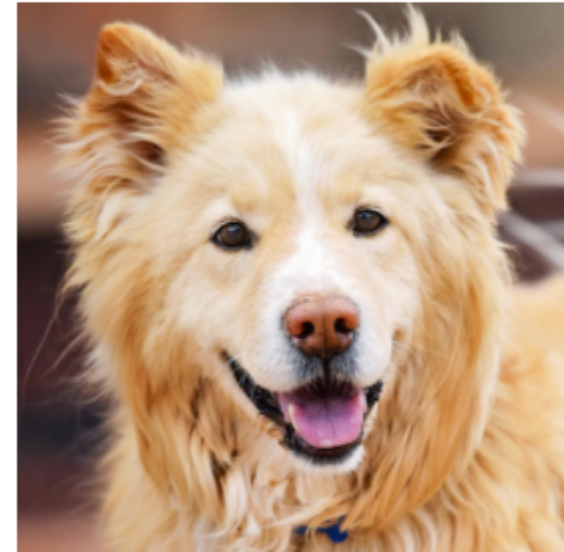
Tells  
me  
what  
will  
happen  
after I  
join



## Become a Guardian Angel

When you become a Best Friends Guardian Angel by signing up to make monthly donations, you're providing gifts that can be used by animals in their hours of need. Guardian Angels are special members of Best Friends, because their gifts are continuous and steady. Help animals all year round by making a monthly gift today.

And as thanks for joining, we'll send you regular updates about some of the animals you rescued when they needed you most.



Select a monthly gift amount

\$10/mo

\$25/mo

\$50/mo

\$100/mo

\$ other




Suggested prefilled  
amount



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charity: water

WHY WATER? OUR WORK ABOUT US GET INVOLVED

DONATE SIGN IN

THE **SPRING**  
.....

Join our community of monthly donors bringing clean water to people in need.

Choose an amount to give per month

\$10 USD/mo \$20 USD/mo **\$40 USD/mo**

\$100 USD/mo Other amount

**DONATE MONTHLY**

Your \$40.00 monthly donation can give 12 people clean water every year. 100% funds water projects.

Secure Payment - This site is protected by reCAPTCHA and the Google [Privacy Policy](#) and [Terms of Service](#) apply.

Person I can help looking directly at camera

Prefilled suggested amount

Tells me tangible impact my gift will have

# Want coaching with Rachel each month?

**Makeover  
My Board**



**July**

**Major Gifts  
Made Easy**



**August**

**End of Year  
Fundraising**



**September**

**LeagueofExtraordinaryFundraisers.com**



THANK YOU!

[www.rachelmuir.com](http://www.rachelmuir.com)

[Rachel@rachelmuir.com](mailto:Rachel@rachelmuir.com)

# Questions?

Please type your questions in the Questions Box!





# Thanks for joining!

## FOR MORE INFORMATION ON QGIV

[contactus@qgiv.com](mailto:contactus@qgiv.com) | 888-855-9595

[www.qgiv.com](http://www.qgiv.com)

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Twitter: @rachelmuir | Facebook: [facebook.com/rachelmuirfundraising](https://facebook.com/rachelmuirfundraising)

Today's goodies: [rachelmuir.com/handouts](http://rachelmuir.com/handouts)

Want more help from Rachel? Check out...

[LeagueofExtraordinaryFundraisers.com](http://LeagueofExtraordinaryFundraisers.com)



Donation Forms | Event Registration  
Text Fundraising | Peer-to-Peer | Auctions

