

Create Reliable Revenue With Recurring Giving: Strategies for Giving Tuesday and Beyond!

Tuesday, November 7 | 12:00–1:00 p.m. ET



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



FUNDRAISING TECH

Made for you



Designed with you in mind

Designed for fundraisers by fundraisers through customer-led development input



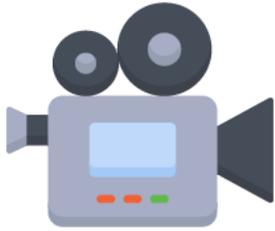
Time saving data tools

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



+ **We're recording this webinar!** We'll send you a copy after the webinar is complete.



+ **Feel free to ask questions!** Use the Q&A box to ask questions and the chat option for general discussion: we'll answer all questions in a Q&A portion at the end of the presentation.

Create Reliable Revenue With Recurring Giving

Strategies for Giving
Tuesday and Beyond!

With Erica Waasdorp,
A Direct Solution



Housekeeping

- Yes, our workshop is recorded
- Yes, you will receive an email with the recording and additional resources
- Yes, please ask questions
- Yes, please have fun learning and being creative!



Hello, my name is Erica Waasdorp



- Recurring donor growth and retention consultant
- Author
 - Monthly Giving: The Sleeping Giant, Monthly Giving Made Easy, Monthly Donor Road Map, Monthly Donor Starter Kit, Monthly Donor Marketing Kit, Monthly Donor Retention Playbook.
- Blogger
- Presenter
- AFP Master Trainer

Connect with me:



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www.linkedin.com/in/erica-waasdorp-544b74

Today's highlights...

- Recurring Giving Trends
- Ways to acquire recurring donors using mini stories and buttons
- Ways to integrate recurring donor messaging in your Giving Tuesday campaigns and beyond
- How to recognize, cultivate, and treat monthly donors once you have them



Recurring donors are trending younger!

Percentage of Donors Who Prefer to Give Occasionally Versus Monthly¹¹

	OCCASIONALLY	MONTHLY
Gen Z	57%	62%
Millennials	79%	58%
Gen X	78%	35%
Boomers	72%	18%

Source: Giving outlook 2023 Pursuant

Monthly online continues to grow

Monthly giving as a percentage of online revenue

All



Source: M&R Benchmarks 2023 (2022 data)

Monthly donors are so...



Because...

Reliable
unrestricted
revenue and
more money

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

Younger
donors like it

Efficient use of
resources

Lifetime value
(think legacy
gifts!)

Retention
rates improve

and more...

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

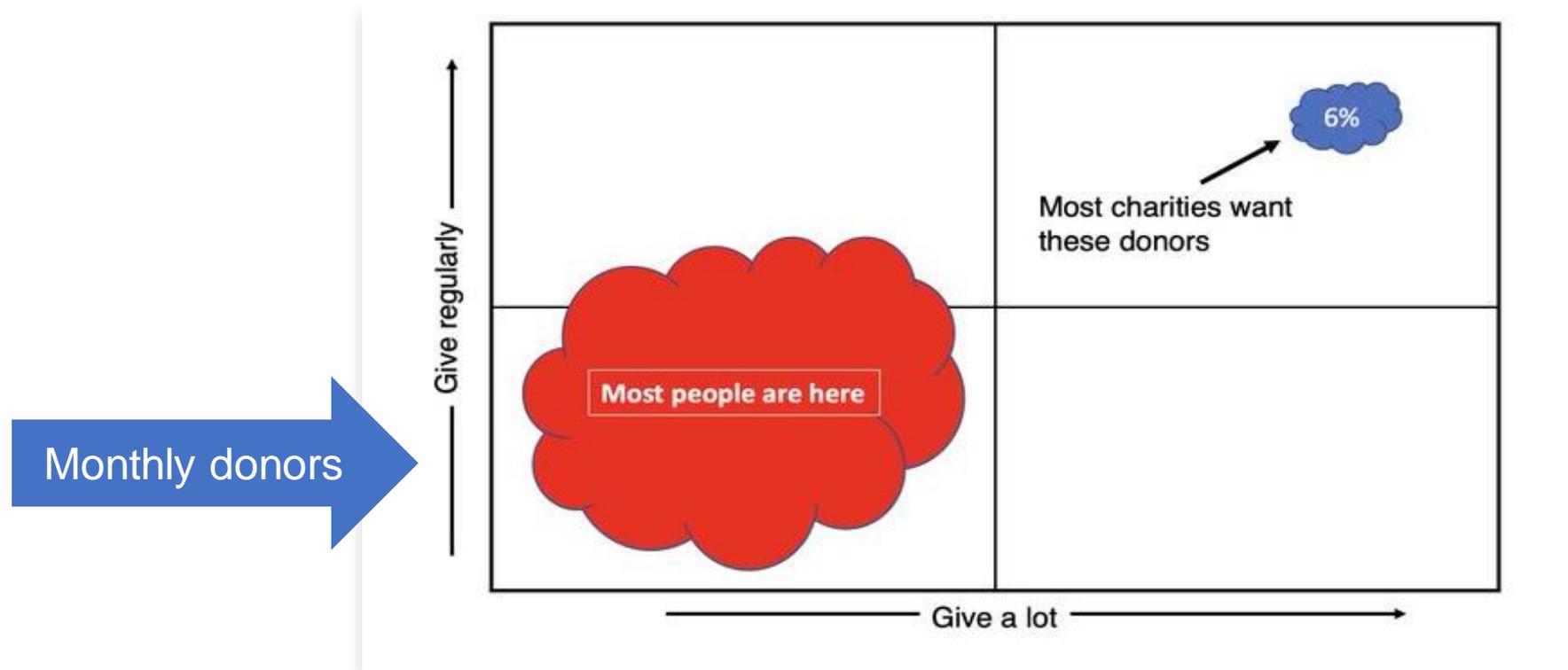


Poll:

How many
monthly donors do
you have?



Small donors are prime prospects for monthly giving



What do you call them?

Regular givers

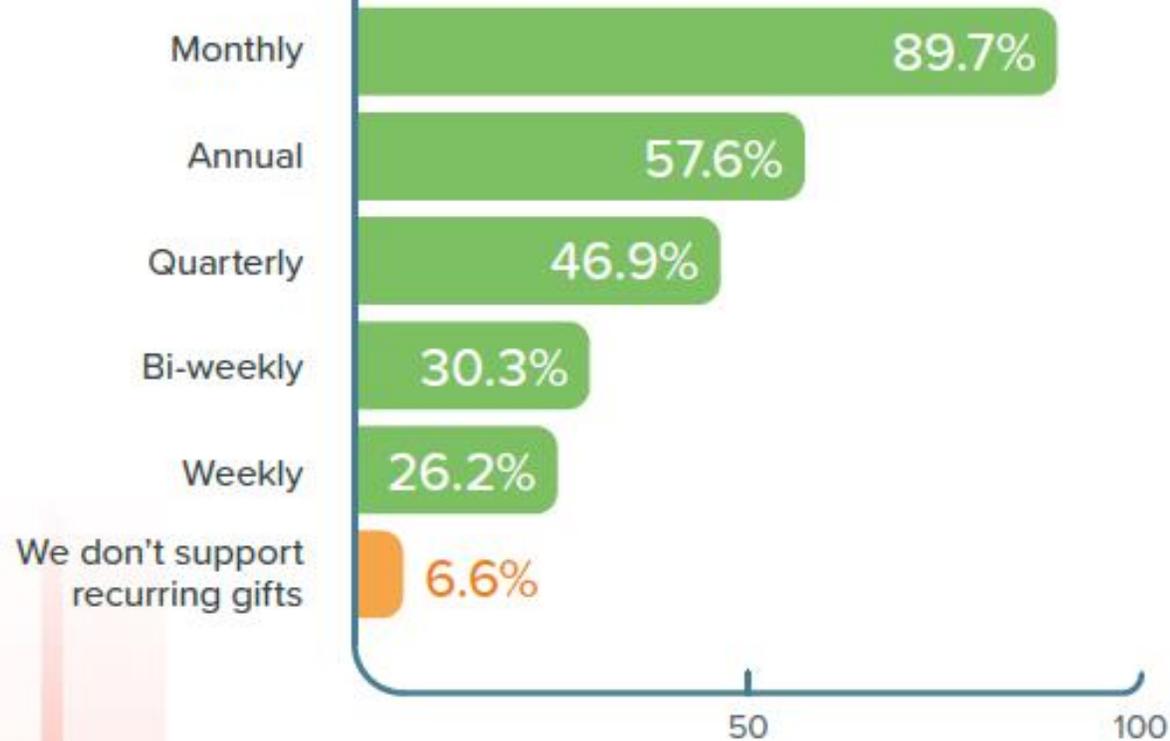
Sustainers

Committed givers

Recurring donors

Specific names...

What types of recurring donations does your organization support?



Let's look at frequencies

Monthly
donors give
more money



What if you had more monthly donors?

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

Sources: 2023 M&R Strategic Benchmarks, USA, A Direct Solution





Why donors give monthly...

- Donors want to help!
- Donors are multi-channel
- Monthly is easy
- Monthly fits their budget



What is your
biggest challenge
with sustainers?



Key elements for growth

Same as for one-time gift fundraising, with small exception... ask for a monthly gift



COMMITMENT



SYSTEMS



TANGIBLE AMOUNTS



STORYTELLING

How committed are you to growing?

Some additional recurring giving strategies	52.2%
Unsure	18.7%
Many additional recurring giving strategies	12.8%
No additional recurring giving strategies - recurring gifts are not on our radar	10%
No additional recurring giving strategies - we're content with our recurring giving results	6.2%

Source: Qgiv Sustainable Giving 2023



Commit and have a driver

- Make someone accountable
- Keeps program on track

Use mini story/nudge on monthly-only page

Your monthly gift will make a difference every day and every month for neighbors in need. Thank you for considering this sustaining support for those in need.

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



Source: VOA

Start by asking
your donors
why they give
monthly



Use testimonials to create mini stories/social proof

I want to support the work of the UUA and although the amount isn't large, I want to be one of the people who is always there for the organization month after month.

-Margaret J.

Source: Unitarian Universalist Association

Direct donors to
your form

Add a button



Make it clear that you're asking for monthly gift



Your generous gift today provides so much more than nutritious Thanksgiving season meals.

You'll also open doors for struggling men and women to break free from homelessness and addiction through our Spiritual Recovery Program.

Please give now!

Progress indicator: 1 of 4 steps completed.

Choose Your Gift

One Time | Monthly

Progress indicator: 1 of 4 steps completed.

Choose Your Gift

One Time | Monthly

\$50 | \$100 | \$175 | \$300

Other

Multiply your Impact. Make It Monthly!

I would like to dedicate this donation to someone

I'd like to help cover processing costs - add to my transaction ?

Give

VISA | Mastercard | American Express | DISCOVER | PayPal | \$

Powered By **Qgiv**

Source: Helping Up Mission



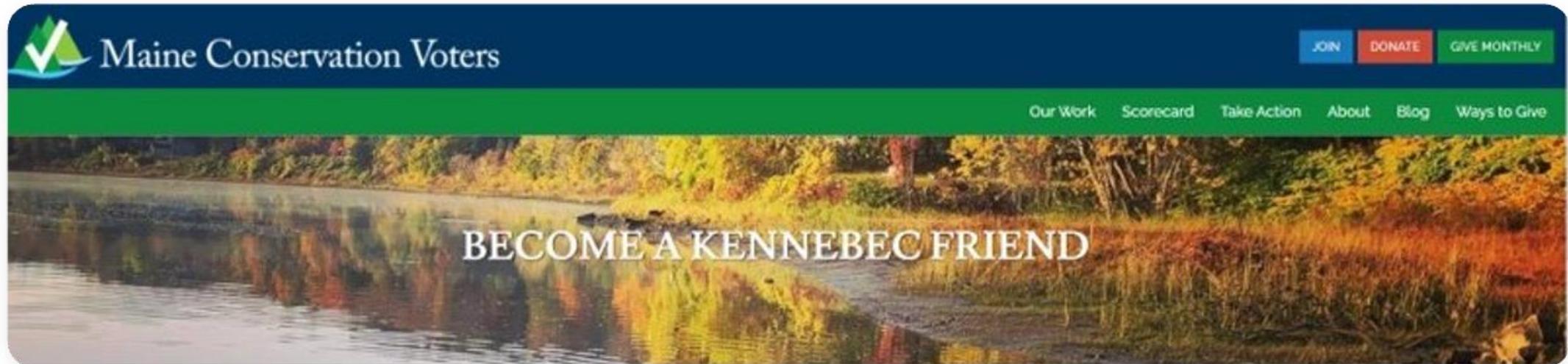
Confirm the donor makes the right decision

The screenshot shows a 'Choose Your Gift' form with a progress indicator at the top. The 'Monthly' option is selected. Below the progress indicator, there are two tabs: 'One Time' and 'Monthly'. Under the 'Monthly' tab, there are four buttons for donation amounts: '\$35', '\$50', '\$75', and 'Other'. Below these buttons is a section titled 'Greatest Impact' with the text: 'Thanks for giving Monthly! Your steady support helps us meet ongoing needs and plan for the future.' and 'Your gift starts today. Cancel anytime.' with a '+ Customize Dates' link. At the bottom, there are two checkboxes: 'I would like to dedicate this donation to someone' and 'I'd like to help cover processing costs - add to my transaction'. A large orange 'Give' button is at the bottom, with payment logos (VISA, AMERICAN EXPRESS, DISCOVER, PayPal, \$) below it. The footer says 'Powered By Qgiv'.

The screenshot shows the same 'Choose Your Gift' form, but with the 'One Time' tab selected. The 'Monthly' tab is also visible. The '\$35' button is highlighted with an orange border. The 'Greatest Impact' section is identical. The checkboxes are the same, but the second one now says 'I'd like to help cover processing costs - add (\$1.40) to my transaction'. The orange 'Give' button now says 'Give \$35/month' with a calendar icon. The payment logos and footer are the same.

Source: Helping Up Mission

Link to monthly-only page from home page



Source: Maine Conservation Voters

Add button to email with mini story/nudge

From: World Vision <info@acmail.worldvision.org>
Sent: Thursday, July 28, 2022 6:26 AM
To: eweasdorj@comcast.net
Subject: Erica, would you drink water like this?



Even more, would you allow a child to drink it, Erica?

Like most 8-year-olds, Ireen (pictured above) goes to school every day. But she also walks a mile several times a day to collect water. She can balance 20 pounds of water on her head. She says, "It makes my neck hurt." But she does it for her mom, for her 4-year-old sister Jekina, and for the baby. All that effort...and the water is contaminated and unsafe.

Nearly 1,000 children under age 5 die every day from diarrhea caused by contaminated water, poor sanitation, and unsafe hygiene.

You can help lift this burden.

Thanks to support from public grants, child sponsorships, foundations, and corporations, every \$1 you give to the Clean Water Fund has the impact of \$5.

GIVE NOW

Thanks to partners like you, **World Vision reaches over 100 million children with clean water**, and we're working to [reach everyone by 2030](#).

In fact, we are on track to reach everyone in need of clean water in our project areas in Rwanda (about 1 million people).

Lasting Change Starts with You

Giving monthly is the most powerful way to donate! When you give to the World Vision Fund, you'll equip kids and families around the world to thrive with reliable access to basics like clean water, nutrition, healthcare, education, and more.

GIVE MONTHLY

"And if anyone gives even a cup of cold water to one of these little ones who is my disciple, truly I tell you, that person will certainly not lose their reward."

-Matthew 10:42 (NIV)

Source: Worldvision

Use a mini story and button within your email

Will you donate today to support more clients, like Matthew, who are in need of nutrition interventions to help them stay on the path to better health?

 **Yes, I Will Give Monthly!**

With a Monthly Donation, you become an honored member of Project Open Hand's Supper Club, and you will help ensure that we can provide healthy meals and deliveries to all of our clients.

Or, please consider a One-time Gift today.

 **Yes, I'll Make a One-Time Gift!**



Where else can
you include
your mini story?





Catholic Relief Services

February 1 · 🌐



When war broke out in Ukraine almost one year ago, CRS was there to help displaced families . Because of monthly support from our Footsteps in Faith donors , emergency funds were available immediately. Will you join us in helping families in need around the globe?



[SUPPORT.CRS.ORG](https://support.crs.org)

Your Monthly Gift Makes a Difference

Not affiliated with Meta

Donate now



Monthly Gift Giving

Becoming a monthly donor places you among our most committed and valued supporters. Your gift will help us fight around the clock to counter the growing threats to wildlife.

Source: Defenders of Wildlife



Source: CRS Meta ad



Your email
signature

Lynda Henriksen

General Manager, Brant Norfolk Chapter

Habitat for Humanity Heartland Ontario

80 Morton Ave East

Branford, ON N3R 7J7

T: (519) 759-8600 ext. 527 C: 905-577-3863

lhenriksen@habitat4home.ca • habitatbn.org

*help give a local family
a fresh start by becoming a*

**monthly
hopebuilder**



Your welcome emails



Monthly ask

Dear Erica,

Thank you, again, for joining our community of supporters. You have already made a difference for Maine's environment. Will you take one more step?

[Please make a donation that will give back to Maine's environment.](#)

Your gift today will pay it forward in so many ways. You will protect the unique habitat Maine provides for countless species. You will safeguard treasured places from the threat of climate change, encroaching development, and pollution for now and for generations to come.

If it is easier on your budget, please consider a [monthly donation](#) that will provide a steady stream of income to be all year long. You'll help us be ready to act when environmental threats emerge.

You will do so much good for Maine's environment by partnering with us today. You can help make a difference one person at a time.

Any support you can provide is meaningful to Maine's environment.

With gratitude,

Option on your appeal reply form

I'LL GIVE TO HELP A CHILD WALK

Yes, Scott, I want to help a child like Fleury with treatment for clubfoot so they can walk, run, play and thrive!

SINGLE GIFT:

\$28 to help 1 child
 \$56 to help 2 children
 \$84 to help 3 children
 \$_____ (other amount)

MONTHLY GIFT:

I plan to give \$_____ a month:

online at hopewalks.org/septhope23
 by automatic withdrawal (see other side)
 by mailing a monthly check (enclosed)

Erica Waasdorp
30 Frazier Way
Marstons Mills, MA 02648-1866

Phone: _____ Email: _____

HOPE WALKS
FREEDOM FROM CLUBFOOT

2309DMW

PO BOX 218
YORK SPRINGS, PA 17372

3 WAYS TO GIVE

DONATE ONLINE:
hopewalks.org/septhope23

CREDIT, DEBIT OR BANK:
Complete the form on back

MAIL A CHECK:
Make payable to Hope Walks

Please verify or fill in your email
← so you don't miss any updates!

Ask for bank account information

STEP 1: Tell Us About Your Gift

\$ _____ One-Time Monthly: _____ / _____ / _____
Gift Amount Start Date

I authorize Hope Walks to charge my credit or banking account as described on this form. This payment authorization is valid and to remain in effect unless I notify Hope Walks by sending written notice to donorservices@hopewalks.org or **PO Box 218, York Springs, PA 17372** five days prior to the scheduled payment date.

Printed Donor Name (as it appears on credit card or bank account)

Donor Signature

Phone

E-mail



Donations to Hope Walks are tax deductible to the fullest extent allowed by law. You will receive a receipt for your gift. For more information on our services, please visit hopewalks.org or call **717-502-4400**.

STEP 2: Select Donation Method

BY CREDIT CARD:

Visa Mastercard Discover American Express

Credit Card #

Exp. Date

3- or 4-Digit Security Code

Billing ZIP Code

BY BANK ACCOUNT WITHDRAWAL:

Personal Checking Business Checking Savings

Bank Name

Bank Routing Number

Bank Account Number

BY ENCLOSED CHECK: Made payable to Hope Walks

Add option to your letter

3 WAYS TO GIVE

 **MAIL**
Return a gift using the enclosed envelope

 **ONLINE**
Donate easily on our website at hopewalks.org/septhope23

 **MONTHLY**
Start automatic monthly support at hopewalks.org/septhope23

Use as much as you can of your appeal reply form

JUST A FEW DOLLARS A MONTH CAN SAVE CHILDREN'S LIVES

Our **Frequent Smiler** program is a convenient and economical way to help children with clefts while maintaining your budget. Select a monthly amount that's affordable for you, and Smile Train will automatically bill your credit card or deduct your gift from your checking account each month. You'll never have to write a check, buy a stamp, or find an envelope again!

\$42

GIVE \$42 A MONTH
(about \$1.40 per day)
and you'll cover the cost
of cleft surgery for two
children each year

\$21

GIVE \$21 A MONTH
(about 69¢ per day)
and you'll cover the cost
of cleft surgery for one
child each year

\$11

GIVE \$11 A MONTH
(about 36¢ per day) and
you'll cover the cost of
one cleft surgery over
the next two years



YES! I WOULD LIKE TO JOIN THE FREQUENT SMILER PROGRAM!

- Please bill my credit card in equal monthly payments of \$_____ using the below credit card.
- Please transfer my gift of \$_____ from my checking account automatically each month.
I've enclosed a check payable to Smile Train for my first monthly gift.
- I'll join the **Frequent Smiler** program by visiting smiletrain.org/joinfrequentsmiler

I'd prefer to make a single donation of \$_____

My preferred credit card information is: MasterCard VISA American Express Discover

Card # _____ CVV# _____ Exp. Date _____ / _____

Signature _____

From time to time, Smile Train allows other worthy organizations to mail to our donors. We carefully screen these organizations and only permit mailings from those whose services may be of interest to our supporters. If you do not wish to receive these mailings, or if you would like to change the frequency or types of communications you receive from us, simply write to us at the address on this form and we will be pleased to respect your wishes.

Smile Train is a 501(c)(3) nonprofit recognized by the IRS, and all donations to Smile Train are tax-deductible in accordance with IRS regulations.

Smile Train PO Box 96231 Washington, DC 20090-6231

Include buck slip in appeal or thank you letter

WILL YOU BE A HERO?

Join the Heroes of Hope Monthly Giving Program

Your ongoing support helps even more people in need. Donations from our Heroes allow us to plan and budget for the future more effectively while maximizing the impact of your donation.

It's easy, secure and you control how much you give.

Joining the Heroes of Hope program makes giving easy for you! You choose how much you contribute each month, and you can change your gift at any time. Monthly gifts have an even greater impact on those we serve!

JOIN THE Heroes of Hope TODAY!



Visit CatholicCharities.org/givemonthly to join this special group committed to helping families in need.



Use postcard



Happy Hearts Day from UNRWA USA!

Two NYC-based sweethearts have lovingly offered to give an extra \$5,000 if we're able to find or upgrade 50 new Solidarity Sustainers by February 14. Talk about a match in heaven! Will you say yes?

Make Palestine your Valentine this month or forever! Sign up securely at unrwausa.org/monthly or by calling (202) 223-3767.

Your monthly gift better the lives of Palestine refugees across the Middle East. And you can easily adjust or cancel your commitment at any time.

Thank you for sharing the love and acting fast because this match sure won't last!

unlock \$5,000 when you make palestine your valentine

**[Formal Greeting]
[Mailing Street 1]
[Mailing Street 2]
[City], [State] [Zip]**

1875 k street nw fourth floor
washington dc 20006
(202) 223-3767

POSTAGE
STAMP



Add emails to other channels

Name: << Test First Name >> << Test Last Name >>

Goal: 50 Solidarity Sustainers

Deadline: February 14, 2022

Your response: **PENDING**

Valentine's Day is right around the corner, and there's no better time to amplify the love you have for Palestine refugees!

When we say amplify, we mean showing your love to Palestine refugees on a monthly basis -- or in other words, bearing the title of a 'Solidarity Sustainer'.

Becoming a monthly donor means providing Palestine refugees with sustaining support all year long. It also means you enable us to respond dynamically to emergency situations facing refugees on the ground in the Middle East.

And not only that! This year, we have two secret admirers of UNRWA USA's efforts who love our community of supporters.

These secret admirers are challenging you, and 49 others, to give monthly. [Once we get 50 Solidarity Sustainers, these admirers will](#)

----- Forwarded message -----

From: **UNRWA USA** <info@unrwausa.org>

Date: Fri, Feb 4, 2022 at 10:08 AM

Subject: [Test] You have a secret admirer!

To: << Test First Name >> <hani@unrwausa.org>



[donate \\$5,000 towards UNRWA USA's relief efforts!](#)

Here is the catch though: We have to reach 50 new monthly donors by February 14. And we need your help in doing so!

[palestine is my valentine](#)



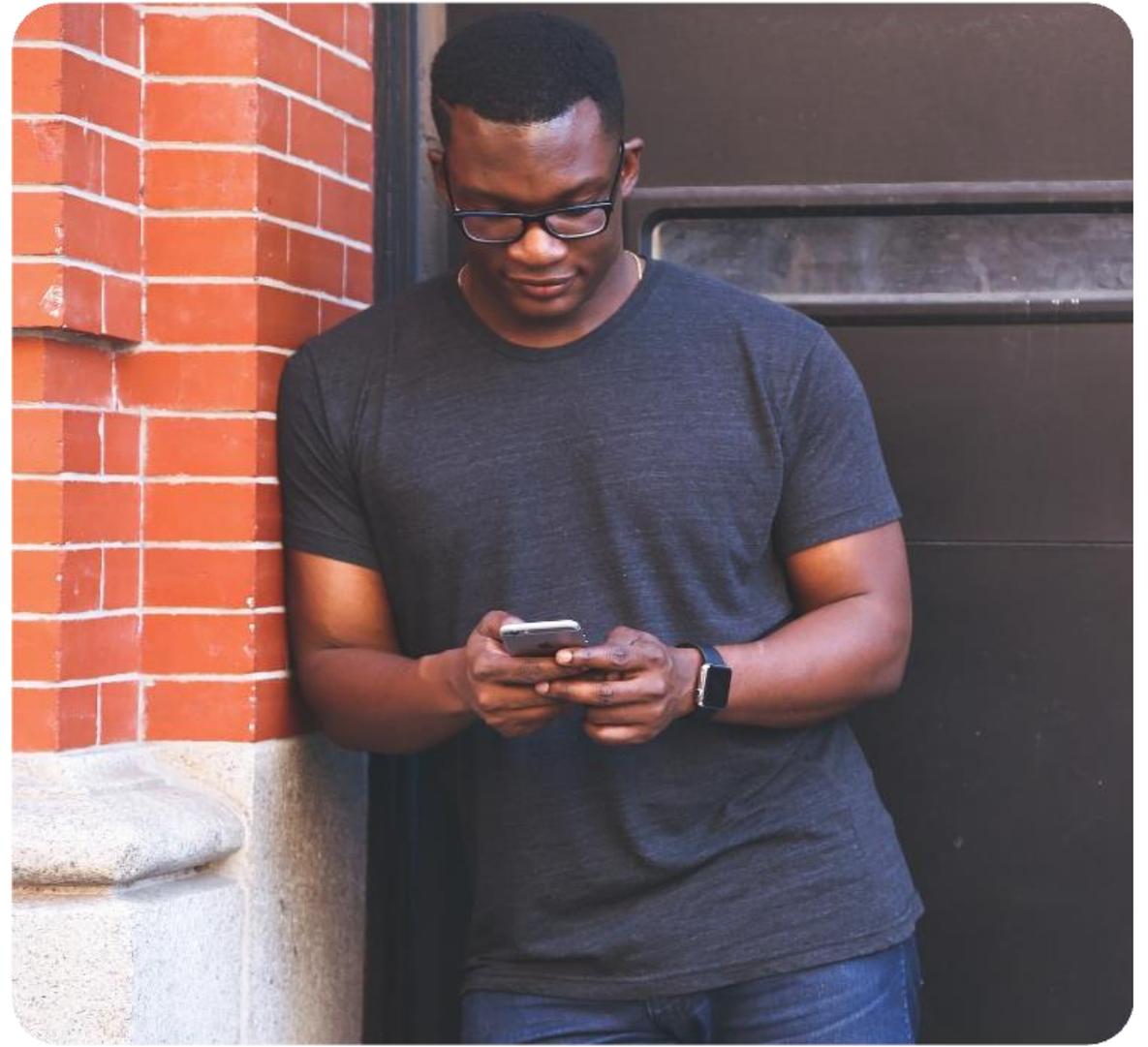
Our 800 active Solidarity Sustainers are the beating heart we count on to ensure we're doing the most for Palestine refugees 365 days a year.

Could you be one, << Test First Name >>?

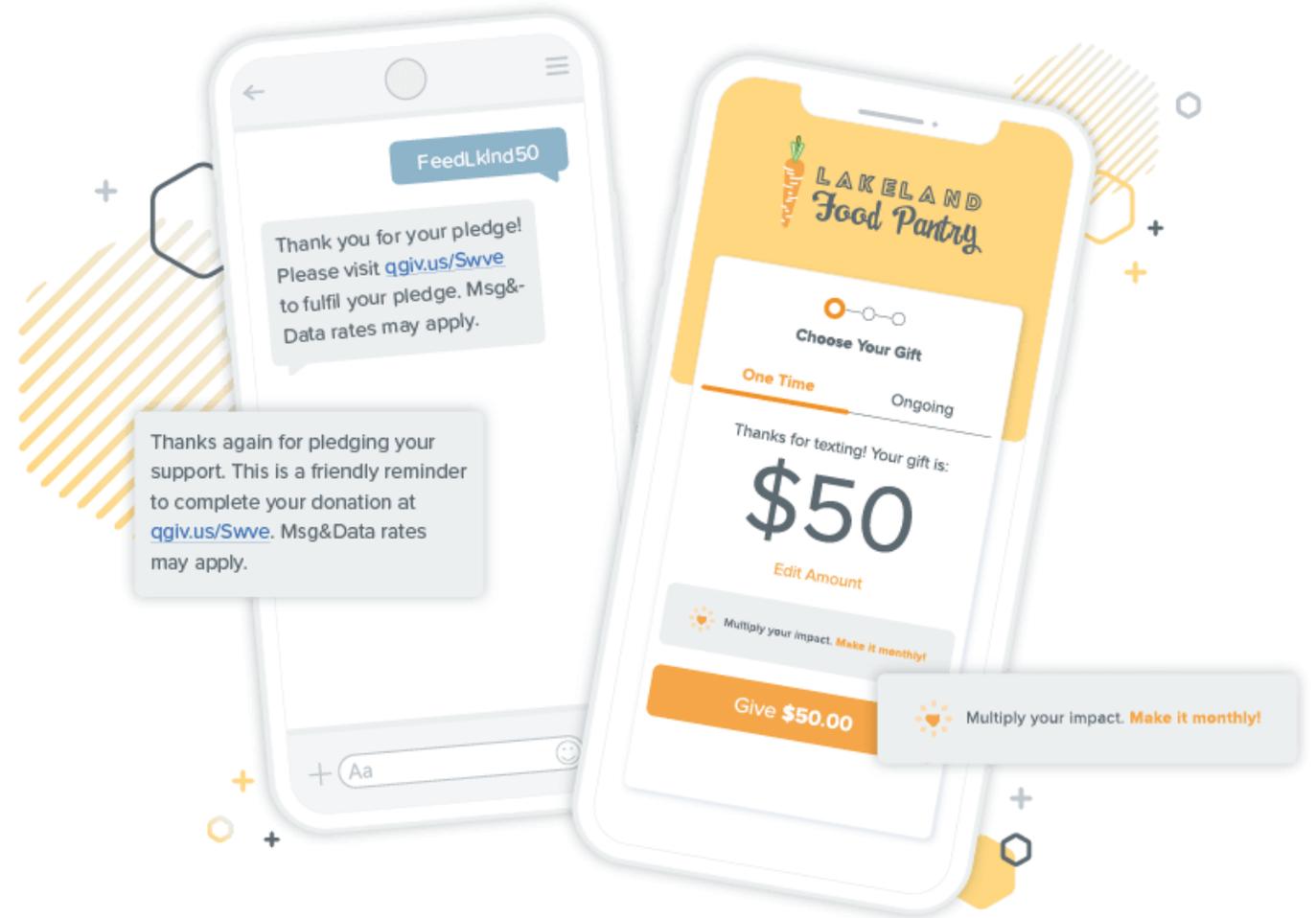
<< Test First Name >>, will you make Palestine your Valentine this month? Any amount, even just \$10 monthly, has the potential to benefit Palestine refugees all year long!



Use the phone,
especially in
combination with
other channels



Use texts for asking, giving, thanking, and reminders



Create a plan to include multiple channels together

- Mail
- Phone
- Email
- Digital
- Other channels



Poll:

What will you test
in the next 3
months?



Key Takeaways

Generating monthly donors is important and deserves focus

There are MANY tactics to grow your monthly donor program

Pick what you're comfortable with

Start with a mini story and a button!

Make your recurring donors feel special but keep your promises doable:



- Donor can expect updates on how their gifts help
- Donor can expect overview of all giving every January

Mail your thank
you and make it
personal

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

Share stories

From: Shema <forkidsake@mailman.bloomerang-mail.com>
Sent: Wednesday, September 27, 2023 8:57 AM
To: Erica Waasdorp
Subject: Thank You for Being a Friend of Mithila



Mithila, 11, Ibrahimpur Girls Dormitory, June 2023

Dear Erica ,

Thank you, your tax-deductible monthly gift of \$10.00 successfully came through on 9/26/2023 !

Today, I'd like to tell you about Mithila, one of the kids you support. Mithila and her brother Shohan's lives changed forever when their father passed away 5 years ago. Their mother was heartbroken and unable to provide for her children.

Mithila came to the For Kids' Sake International supported Ibrahimpur Orphanage with an eye condition called strabismus. This

is often caused by the eye attempting to overcompensate for a vision problem. Untreated, it can lead to permanent blurred or double vision.



*Mithila and her brother Shohan before her eye surgery
Ibrahimpur Orphanage*

Upon arriving at Ibrahimpur, Mithila was already experiencing vision problems, leading our team to seek specialized medical advice. After consulting with multiple doctors, she underwent a corrective eye surgery.

The surgery was a success! Today, Mithila is happily looking forward to a bright future ahead. Living at the Ibrahimpur Orphanage, Mithila and Shohan are both thriving. They have three meals a day, clothing, shelter, medical care and an award-winning education.

Without you, Erica, the Ibrahimpur Orphanage and School would not be able offer these life-changing services. Thank you!

In addition to this note, you will receive a year-end tax receipt by January 31, 2024, documenting your total contributions for the year. Thank you for being a Friend of For Kids' Sake International.

With Heartfelt Gratitude,

Shema Ruperto
For Kids' Sake International
Executive Director

Thank You, Erica!

Include monthly donors in your Giving Tuesday campaigns

Always recognize their monthly gift.
Ask for an extra or special gift.

Source: Houston Food Bank



Give Now



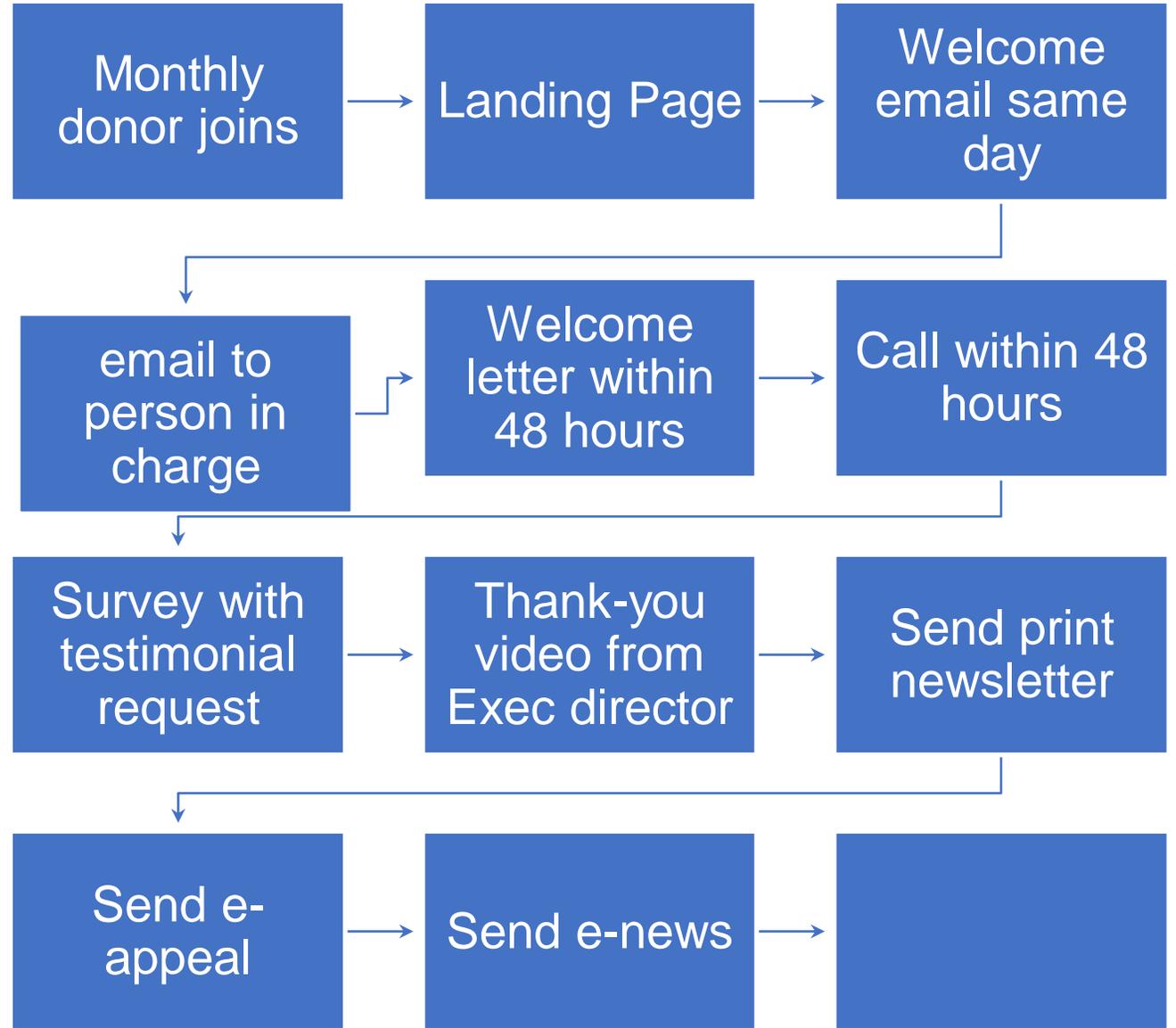
Dear Abigail,

I have great news that will make your day 3X better! It's #GivingTuesday, also known as #GivingFoodDay at the Houston Food Bank. Today only, your additional gift can help provide TRIPLE the impact for neighbors facing hunger.

As a monthly donor and Faithful Friend you know the impact this can make for your community. The Houston Texans have offered to triple donations, up to \$100,000, to help provide more meals for our neighbors this holiday season. Every \$1 you give today can now TRIPLE to help provide food for 9 meals.

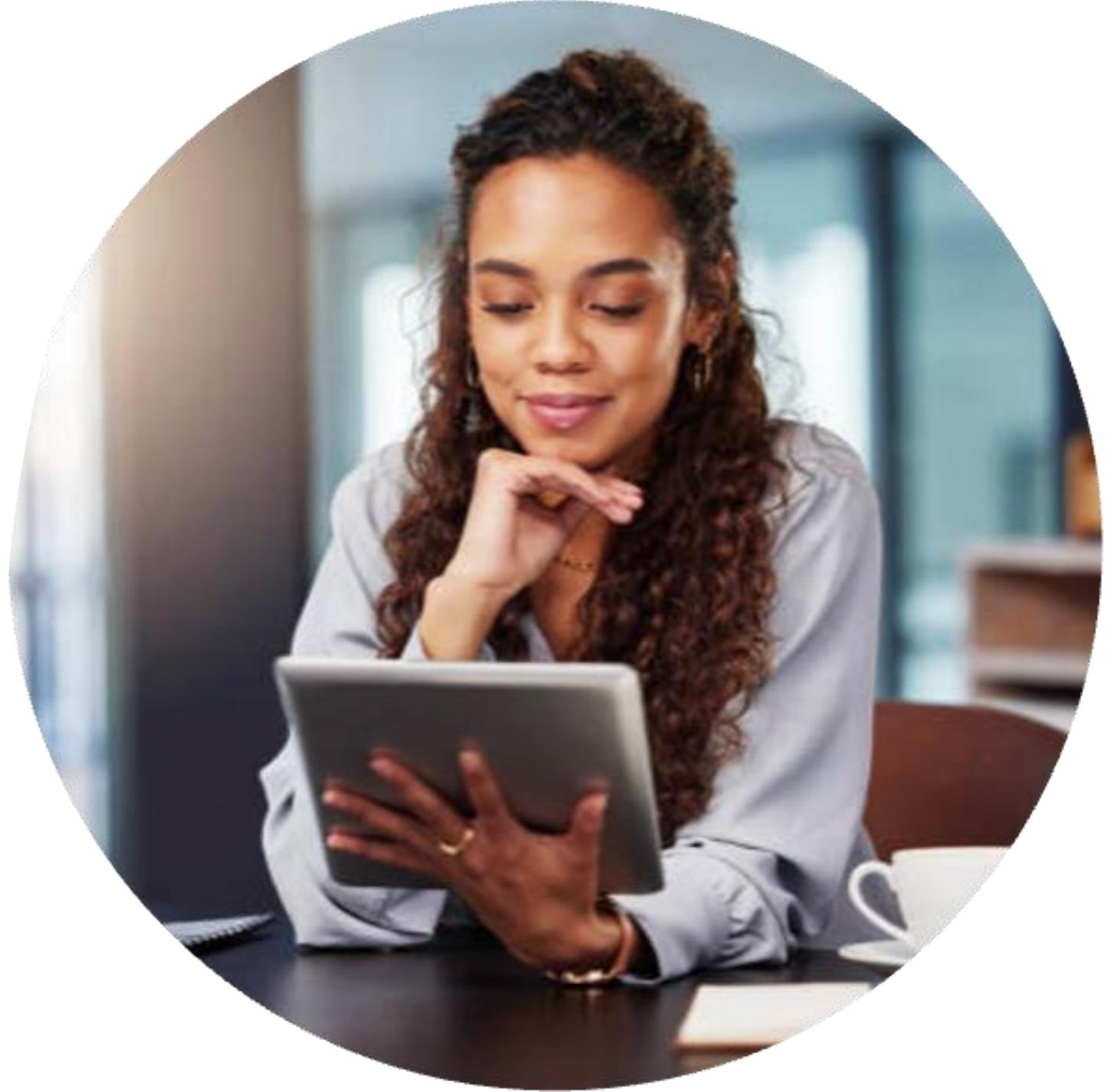
Give Now

Create special email segment.
Review your stewardship plan.

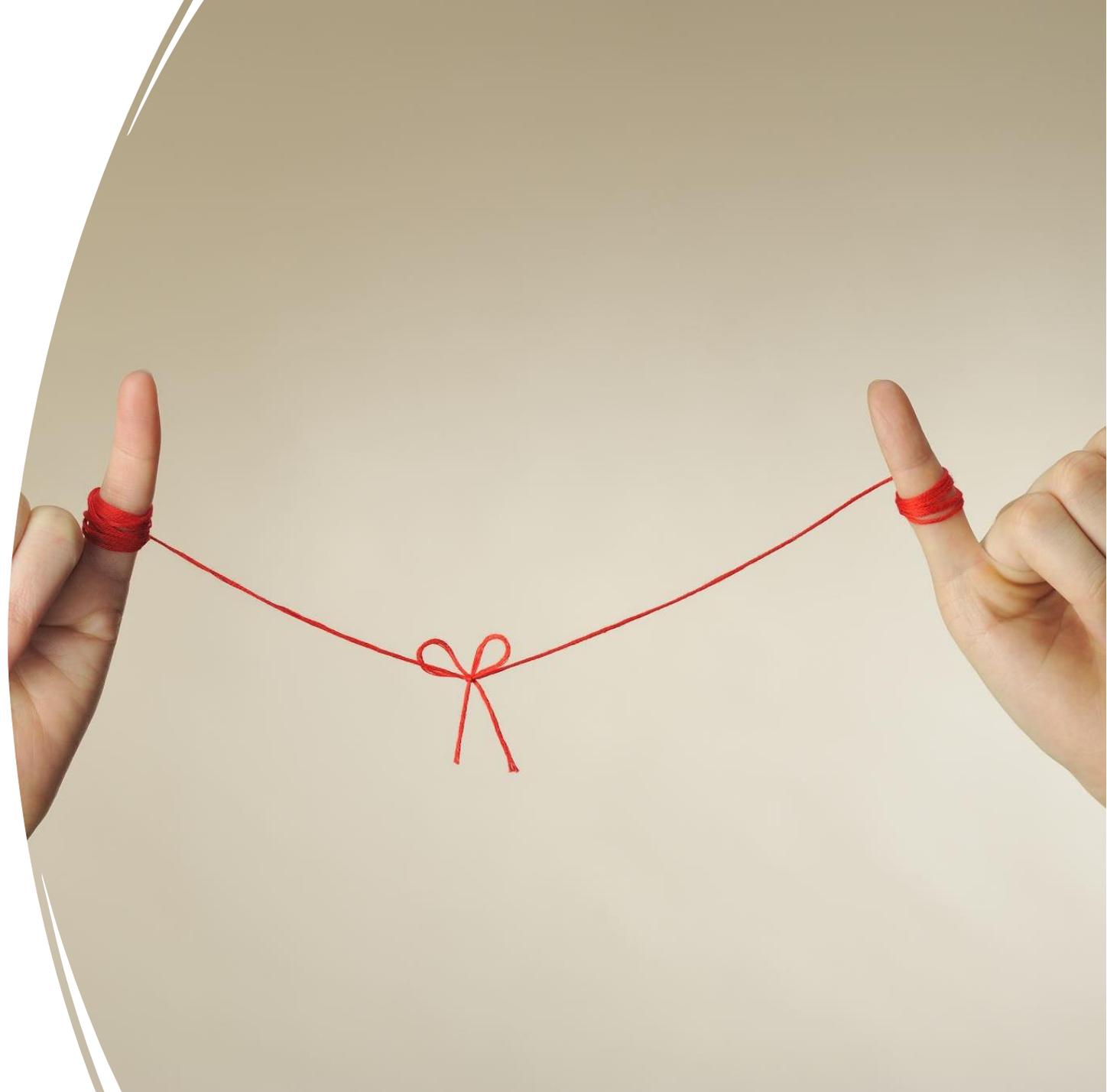


And remember:

- ✓ It's OK to reuse your stories
- ✓ It's OK to repurpose!
- ✓ Multiple channels
- ✓ Multi-purpose
- ✓ Personal



Stewardship
and Retention
go hand in
hand



Create a retention day every month

- Map out your processes
- Check payments and reports
- Check for feedback
- Quantify the annual value at risk
- Look at follow up as a courtesy to your donor



Do everything in
your might to keep
them!



Go to adirectsolution.com



Monthly Donor Retention

Play Book

Prepared by

Erica Waasdorp

A Direct Solution

Follow up early, right away, and often!



BEFORE CARD EXPIRES
AND AFTER CARD
DECLINES



MAIL LETTERS OR
POSTCARDS



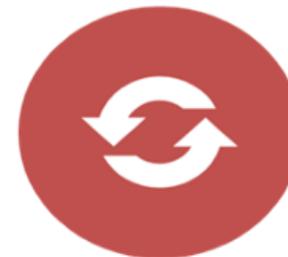
EMAIL



PHONE CALLS



TEXT



REPEAT

Make monthly donors a line item in the budget



Write
down
your goals



GOALS

Poll:

What is your
monthly donor
goal by the end
of the fiscal year?





“If you do not change direction, you may end up where you are heading.”

-Lao Tzu



Contact Erica

- Erica Waasdorp, A Direct Solution
- erica@adirectsolution.com
- <https://www.linkedin.com/in/erica-waasdorp-544b74>
- www.adirectsolution.com for downloads and resources and to sign up for my blog.

Questions?

Please make sure your questions are typed in the Q&A box!

