MONTHLY GIVING
Strategy

How to Use This

Welcome to your
Monthly Giving Strategy worksheet!

Launching a recurring giving program at your nonprofit is the same as any other new program or project. Before you start building the foundation you need to sort out: where you are (baseline), where you want to go (goals) and how you're going to get there (planning). As a guide for monthly giving, this document also includes other prompts specific to fundraising for recurring gifts. So, take the time to consider each section, make notes and capture ideas. Make it messy! **Perfection is not required here.**

In this worksheet I also refer to three steps in a donor journey framework I developed for small nonprofits: Inspire, Ask and Nurture. It's not required reading, but if you want to learn more about the framework and how to apply it to your fundraising you can find more information here: https://www.cedarfundraising.ca/fundraising-from-the-ground-up-blog/donor-systems
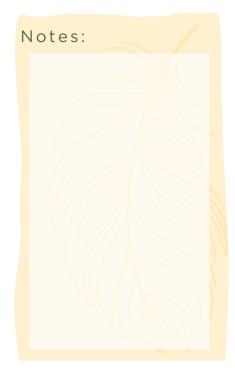
Enjoy!
Kim

You can connect with me at:
info@cedarfundraising.ca

Baseline

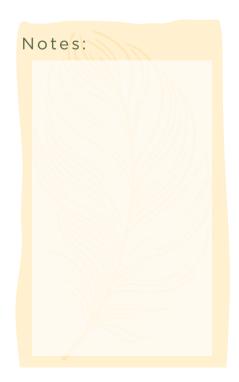- **Current # of Monthly donors:**
- **Average monthly donation:**

Current Journey

How do donors find out about donating monthly to our organization?	
What is our offer to donors who decide to make a monthly donation (what are the benefits)?	
How/when do we solicit/ask for a monthly contribution?	
How do we segment or "tag" monthly donors in our CRM or donor database?	
How do we communicate with monthly donors?	
Do we ask monthly donors to increase their contributions?	
What is our process for when a monthly donor indicates they want to cancel their recurring donation?	
What is our process for following up with credit card expirations?	

Operations

Notes:

Tool	What we are currently using
CRM/Donor Database	
Online Fundraising	
Receipting	
Email	

Monthly Giving Team

Notes:

Role	Team member(s)
Project Lead	
Strategy/ Decisions	
Asset Development (copy, graphics, video, forms)	
IT/Systems	
Monthly Giving Program Lead	

goals

AT THE END OF THE "BUILD" PHASE,
our monthly giving goals are:

Goal	How we will achieve this goal
Ex. Launch our monthly giving landing page	*Joan to write, Carl to integrate form with database*
Goal 1	
Goal 2	
Goal 3	

IN 6 MONTHS,
our monthly giving goals are:

Goal	How we will achieve this goal
Ex. Promote monthly giving at annual fundraising event	*Identify and ask 5 donors to join*
Goal 1	
Goal 2	
Goal 3	

Inspire

BRANDING & KEY MESSAGING

The Name

Ideas for a Monthly Giving program name:

Impact Statement
& OUR "WHY"

What is the problem our donors are solving through us?

Why should they give to your organization specifically - what makes you unique and the BEST choice?

Impact reasons (what their gift will achieve):

Donor reasons (why it is important for them personally):

Gift breakdown - can you illustrate the impact of ad recurring gift? *(ex. $25/month will provide food for one dog)*

$10/mo -

$20/mo -

$50/mo -

$100/mo -

Ask
SOLICITATION STRATEGIES

"Acquisition"
(attracting new donors to give monthly)

- Digital/social ads
- SEO + Landing page
- Optimized form
- Events
- Direct/in-person ask
- Link to give (URL or QR code)

"Conversion"
(converting current one-gift-at-a-time donors to monthly):

- Optimized form
- Email appeal
- Drip campaigns
- Direct message (text/social media)
- Direct mail
- Phone call
- Event ask
- Direct/in-person ask
- Link to give (URL or QR code)

"Upgrade"
(increasing gift amounts for existing monthly donors)

- Email appeal
- Drip campaigns
- Direct message (text/social media)
- Direct mail
- Phone call
- Direct/in-person ask

Tip:

For new recurring programs, start with "Conversion" strategies first, as your best prospects for monthly giving are already a part of your community!

Solicitation Phase	Strategy

Nurture
DONOR EXPERIENCE

BEFORE THE FIRST GIFT:

IN THE WEEKS AFTER THE FIRST GIFT:

ONGOING:

Monthly Giving Assets

Review "Ask - Solicitation Strategies" and "Nurture - Donor Experience" and note any copy, graphics, video etc. that will need to be developed.

Copy	Media
ex: welcome email	ex: resized photo for landing page

Business rules

PROCESS

How will we segment/tag constituents as monthly donors?

Steps to take when a monthly donor indicates they want to stop their recurring donation + role responsible:

Process for credit card expirations + role responsible:

Planning
PROJECT TIMELINE

Build Phase
TIMING:

Task	Timing	Responsible

Soft Launch
TIMING:

Task	Timing	Responsible

Full Launch
TIMING:

Task	Timing	Responsible

Systemization

Task	Timing	Responsible

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