

# A Monthly Giving Road Map

Erica Waasdorp, A Direct Solution

# Welcome!



# Erica Waasdorp

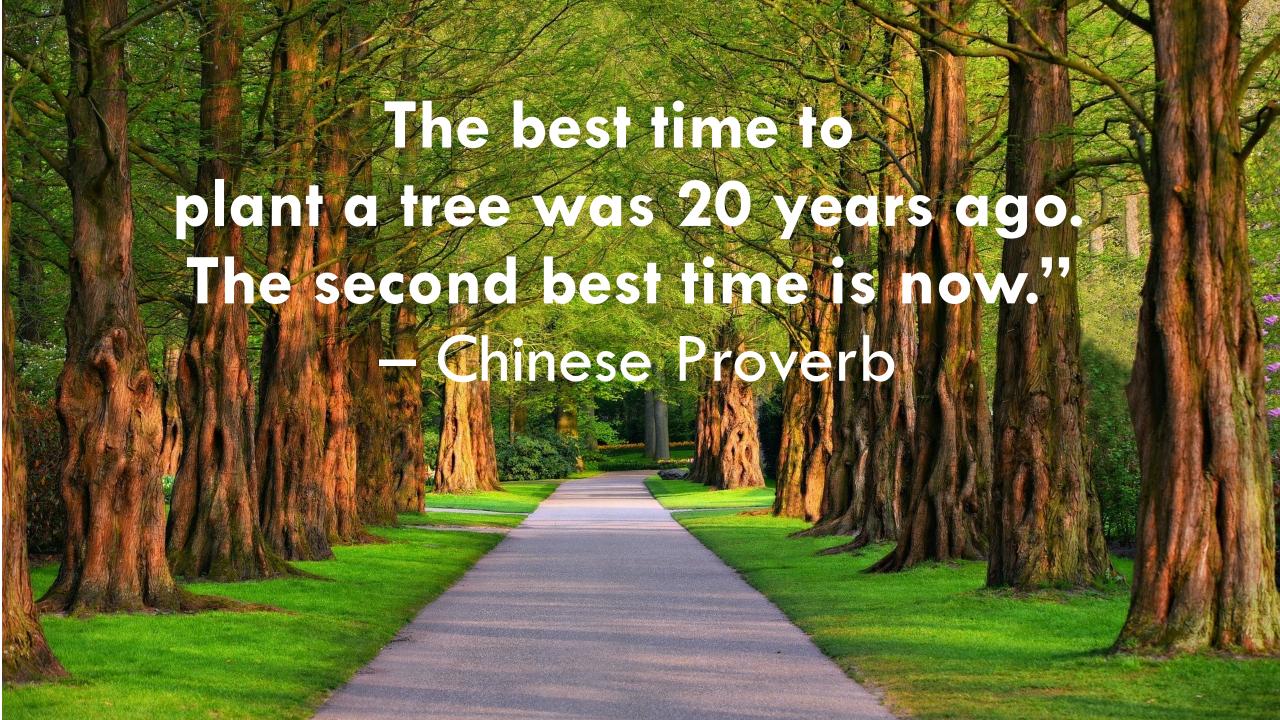
President

A Direct Solution

Author Monthly Giving. The Sleeping Giant

Author Monthly Giving Made Easy





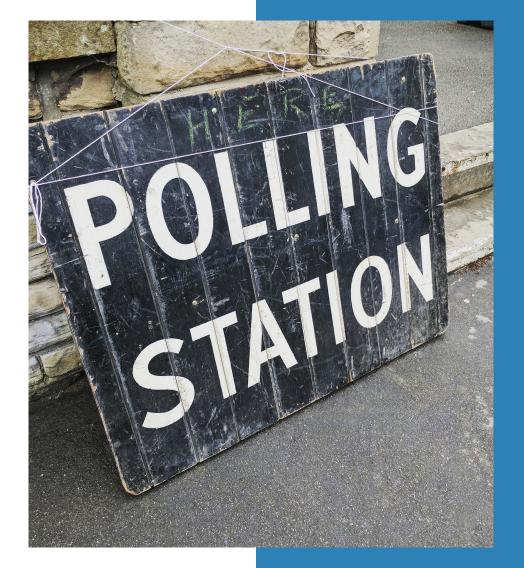
# Agenda

- 1. Why monthly gifts
- 2. Approaches for peer-to-peer and giving day donors
- 3. Your questions and sharing
- 4. Closing



# Poll

How many monthly donors do you have now?





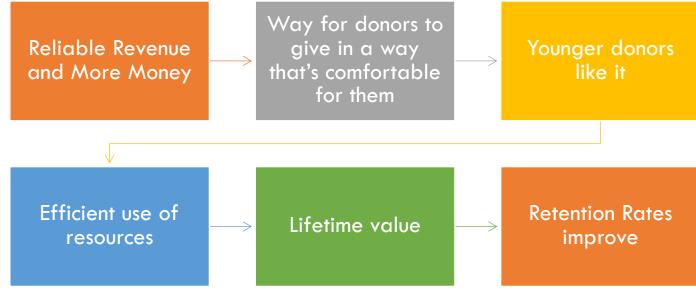
# Monthly donors are so...





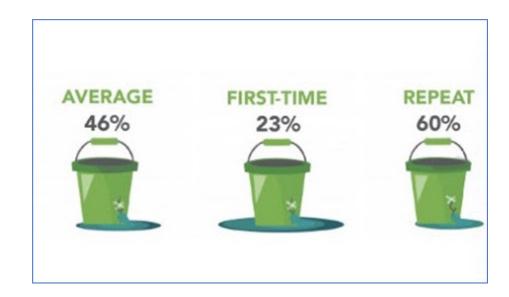


# Because...





# Retention rates increase











# You can plan on the funds to be there no matter what!



# Monthly Donor impact is huge!

| Number of Monthly Donors      | 100       |
|-------------------------------|-----------|
| Average Monthly Gift Amount   | \$25      |
| Average Monthly Revenue       | \$2,500   |
| Average Annualized Revenue    | \$30,000  |
| Average Revenue after 5 years | \$150,000 |





# All these play a role and lead to more monthly gifts



Figure 10: Generosity motivator ecosystem

# Key elements for growth

Same as one time gift fundraising, with small exception: Ask for a monthly gift







**SYSTEMS** 



TANGIBLE AMOUNTS



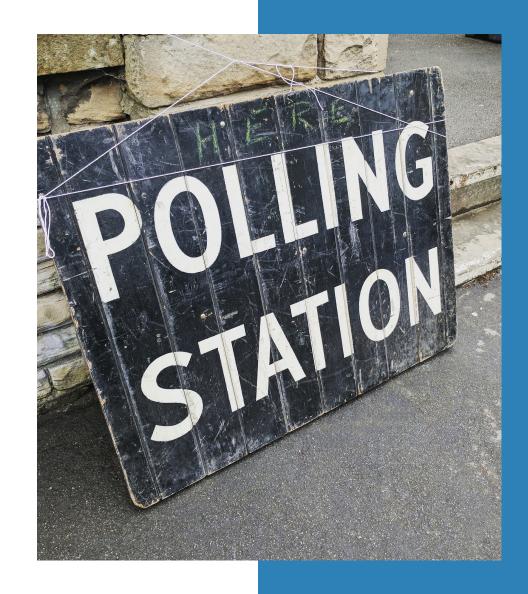
**STORYTELLING** 



# Poll

Which payment platform are you using?





# Create a dedicated monthly-only page



### Make a difference every day with your monthly support.

This winter, people are going hungry, unable to feed their families or afford a roof over their heads. VOA is on the front lines of support, but we need more friends to help with local efforts like sheltering, feeding and emergency support.

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.

| \$12.50 | \$17  | \$25    |
|---------|-------|---------|
| \$50    | \$100 | \$Other |

### **Billing Information**

| First Name | Last Name |  |
|------------|-----------|--|
|            |           |  |
|            |           |  |
| Street 1   |           |  |
|            |           |  |



"Thou shalt love thy neighbor as thyself."

MARK 12:31



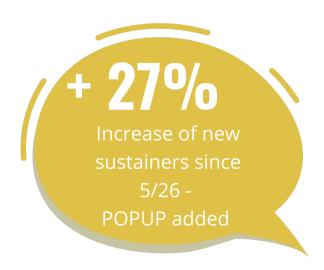


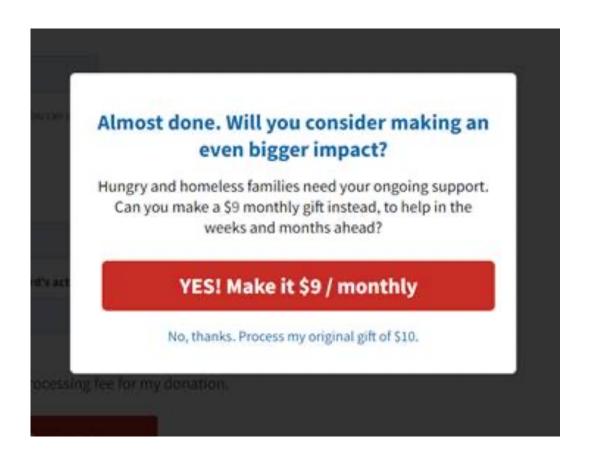
# Create a button to link to it





# Add Monthly "Upsell" Popup



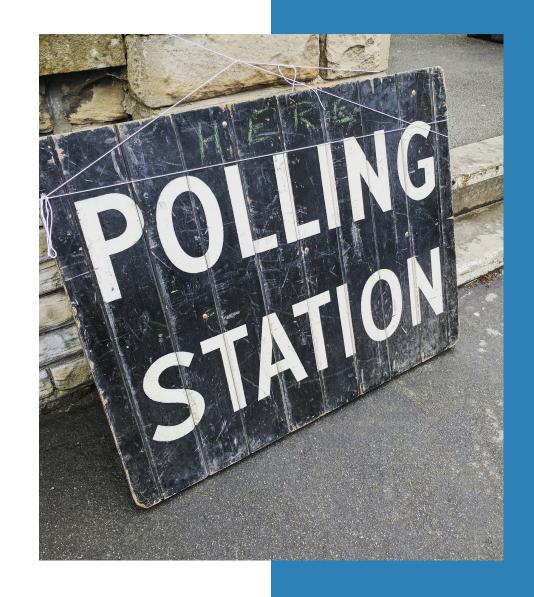


Source: VOA



# Poll

How many new peer to peer donors or giving day donors do you expect?





## Create or tweak a welcome email series

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 <u>monthly donation</u> 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,



# Send a survey and include a request for a monthly gift

Source: Yosemite Conservancy

| 7.               | Given that the nation's parks — including Yosemite — and the natural wonders they possess have been threatened for years by underfunding, do you agree that private citizens should do more to directly aid and support America's parks?   |
|------------------|--|
|                  | Strongly Agree Agree Disagree  |
| 8.               | Would you be willing to join others who deeply value the natural wonders found in Yosemite National Park, and help provide for the park's future, by supporting Yosemite Conservancy with a gift of as lift as 7 cents a day?  |
|                  | ○ No   |
|                  | Yes! I'll help ensure that Yosemite's incomparable treasures can be protected today, tomorrow, and for generations to come by supporting the work of Yosemite Conservan  |
|                  | I want to give: \$5* a month \$10 a month  |
|                  | Other monthly gift \$  |
|                  | (\$5 minimum)  |
|                  | Here is my one-time gift of:   |
|                  | \$25* \$35 \$100 \$250   |
|                  | My best gift \$  |
|                  |  |
| _                |  |
|                  | My check to Yosemite Conservancy is enclosed.  |
|                  | Please charge \$:  |
|                  | ○ Monthly ○ One Time   |
|                  | ○ Visa ○ MasterCard ○ Amex ○ Discover  |
|                  | CARD NO. EXPRATION DATE  SECURITY CODE SIGNATURE   |
|                  |  |
|                  | EMAIL  |
| yo<br>di:<br>tra | gift of this amount or more entitles you to a variety of benefits and privileges, including listing our name in the Honor Register at the Valley Visitor Center, a Yosemite Conservancy Passport wit iscounts on lodging and activities in and around the park, and a package of rail maps to enable you to make the most of your visit to the park.  — Please do not send trail maps. |
| M<br>Joi         | Take an annual gift of \$1,000 or more, and you will be welcomed into the who Muir Heritage Society, and receive a year of free entrance into Yosemite YOSEMITI CONSERVANCE  |



# Create an online quiz or survey



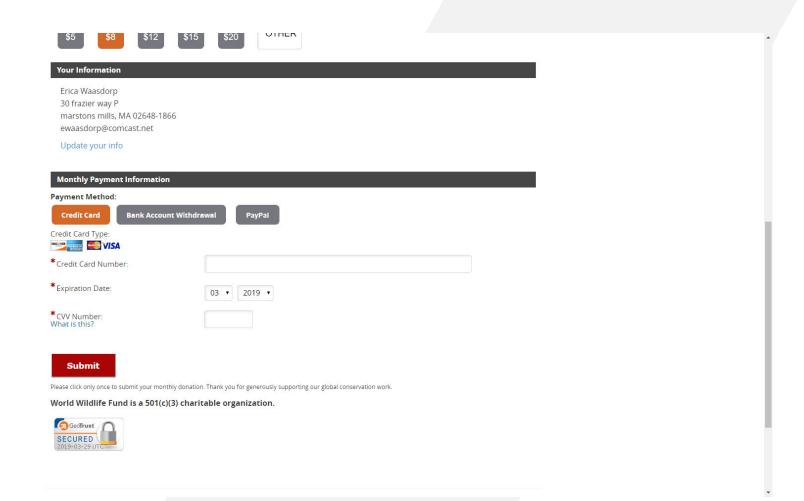
Erica, do you know how much you've helped protect our planet?

Take our short quiz to discover how WWF supporters and activists like you have brought about big wins for wildlife and nature in the past year.

Source: World Wildlife Fund



# Drive responder to monthly gift page

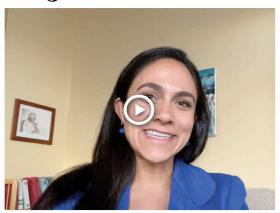


Source: World Wildlife Fund

# Use thank you video and invite personally

From: Sent: To: Subject: Shema <ForKidsSake@mailman.bloomerang-mail.com> Wednesday, February 9, 2022 4:32 PM Erica Waasdorp What Will it Take?

### 150 New Friends



We know. That is a lot of new Friends of For Kids' Sake. Watch the video above to learn why monthly donors like you are crucial.

Dear Erica,

I'm incredibly grateful for you, our Friends of For Kids' Sake (FKS). You improve the lives of thousands of children every day - thank you! In 2022, you can have a bigger impact than ever before.

Source: For Kids' Sake

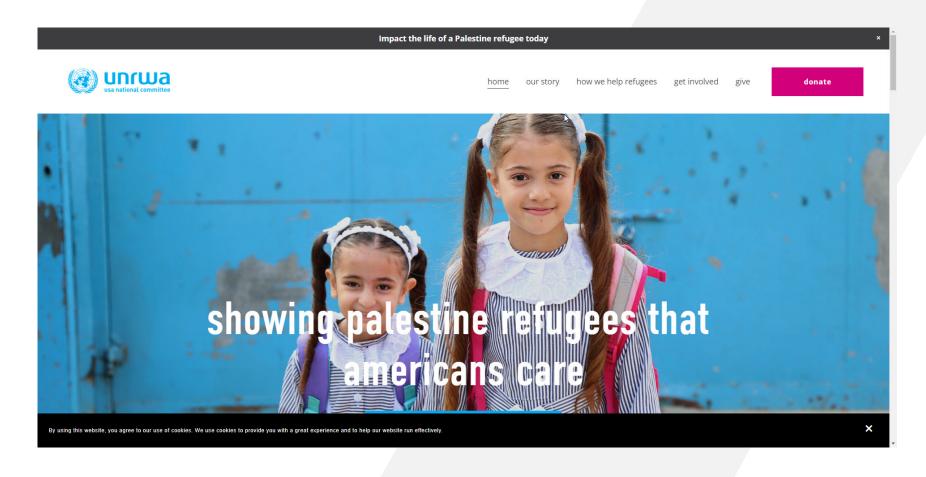


# A Case Study





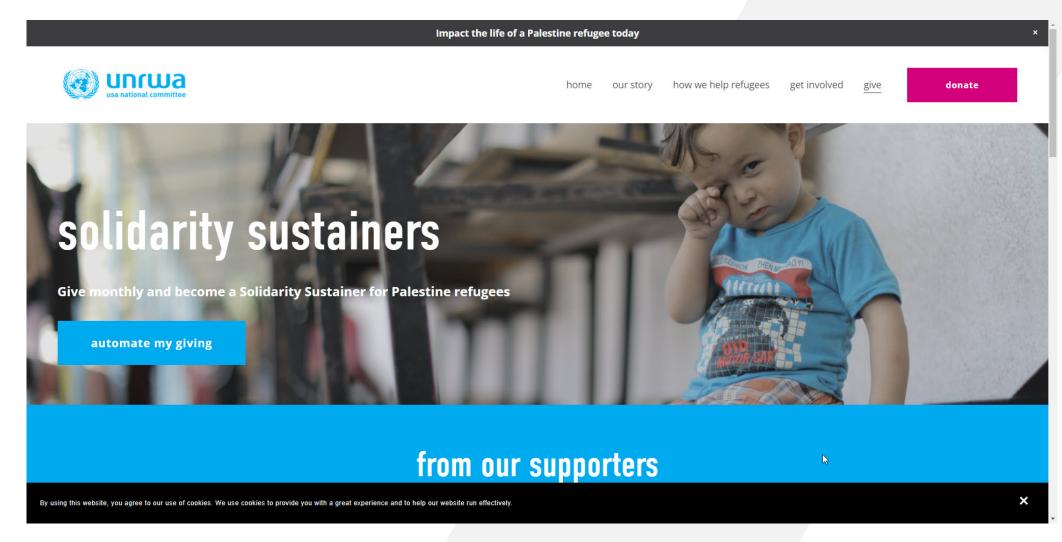
# Create special campaign



Source: UNWRA

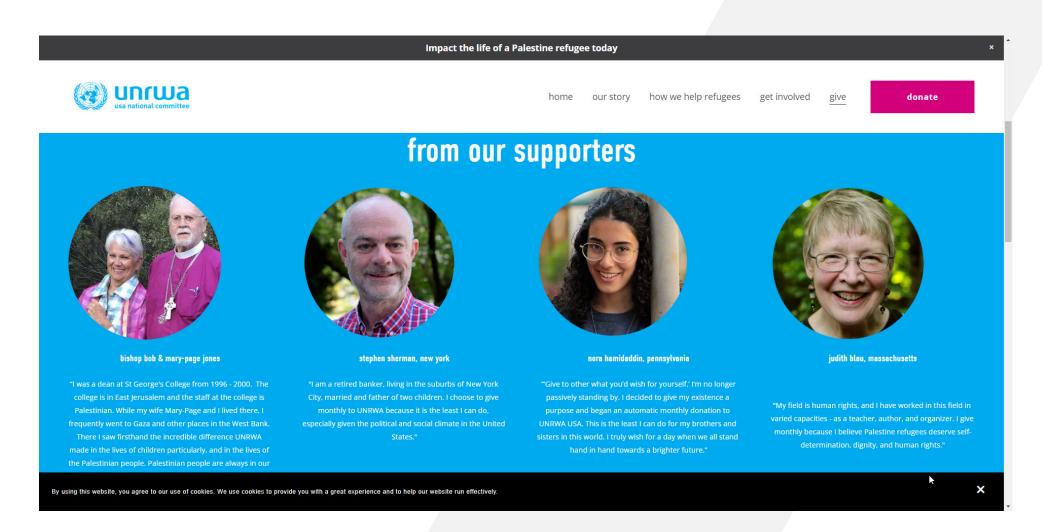


# Landing page from home page





# Use sustainer testimonials



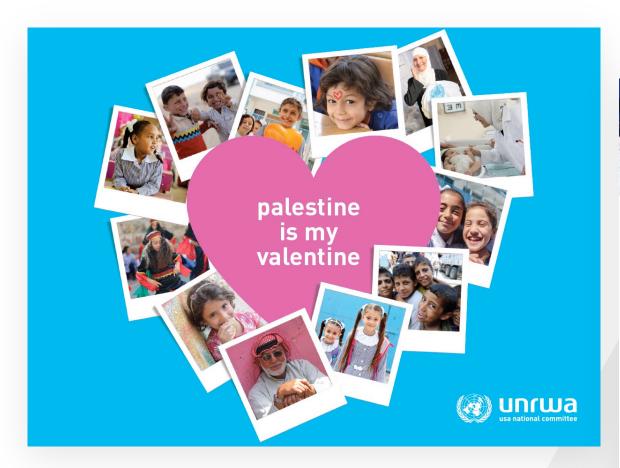


# Palestine is my Valentine Campaign

- Committed donor couple provided \$5,000 match
- Set goal: Gain 50 new monthly donors
- Plan with mail, email and social media and popups
- Perk Palestine is my Valentine t-shirt



# Post card to 10,000 donors



Source: UNWRA



### 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 betters 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!



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

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

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



# Email 1: You have a secret admirer...

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 >> <hai@unrwausa.org>





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

### 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!

Source: UNWRA

# Unlock a match



Hani, do we have a match for you!

If you and just 49 others join UNRWA USA as monthly donors by Valentine's Day, our secret admirer promises to match your support for Palestine refugees with another \$5,000!

Our monthly donors, otherwise known as Solidarity Sustainers, are the lifeblood of UNRWA USA - each with their own story and passion. They include lovely couples like Mary and Roger Allen.



help us unlock \$5,000

"[Our love story] was definitely an adventure, I was 28 and Roger was 30. We met at UPenn's Episcopal Church and found common ground through Church music. We got married on Thanksgiving Day in 1972 and have been married for 50 years!"

Mary and Roger found their love for Palestine at the church, too. After witnessing the situation of Palestinians firsthand in 1992, the Diocesan Bishop was shocked into starting a Mid-East Study Group, which Mary and Roger regularly attended. By 2008, Mary had retired from teaching and has dedicated her time to helping Palestine refugees. **Now, as monthly donors, Mary and Roger are making Palestine their Valentine.** 

### make palestine your valentine!

As the stewardship chair at her church, Mary explained: "I know how important it is to have money come in constantly that you can count on...1,000 people giving 10 dollars a month is very valuable."

Monthly giving is the most cost-effective and simplest way to help Palestinian refugees 365 days a year. Will you start a monthly gift and help unlock a bonus \$5,000 to help Palestine refugees?

Thank you!



# Mention the match again

Subject: [First name], your 2 minutes can mean \$5,000 for UNRWA USA.

Body

Hello [First name],

2 minutes. The time it takes to read this email.

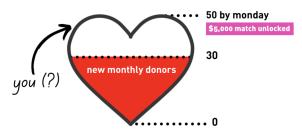
The time it may take you to earn \$1 at work.

That \$1, put monthly towards UNRWA USA, **now has the power to unlock \$5,000** to help us support Palestine refugees.

A generous secret admirerdonor from New York has pledged to match \$5,000 if you, and 49 others, join UNRWA USA as a monthly donor (or "Solidarity Sustainer") **by this**Monday, Valentine's Day.

The amazing thing is, we're this close.

### we're this close!



[Button: "help us unlock \$5,000 forto support Palestine refugees"]

Since we started the challenge, we've welcomed We now have 30 amazing new Solidarity Sustainers – it's down to the wire, and you can make all the difference.

Monthly giving is the most cost-effective and simplest way to show our love to PalestinePalestinian refugees not just through Valentine's Day, but 365 days a year. [If you join, you'll also receive a "Palestine is my Valentine" T-shirt as a warm thank you for your generosity.]



Our Solidarity Sustainers are the beating heartlifeblood of UNRWA USA – each with their own story and passion. Now, **we just need one incredible human every 6 hours to join**, and we will reach the \$5,000 match!

### Could you be the one?

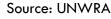
With love and thanks.

The UNRWA USA team

Source: UNWRA

# Results Valentine's Campaign

- 64 new monthly donors
- An extra \$1,200 in monthly income
- \$14,400 more a year



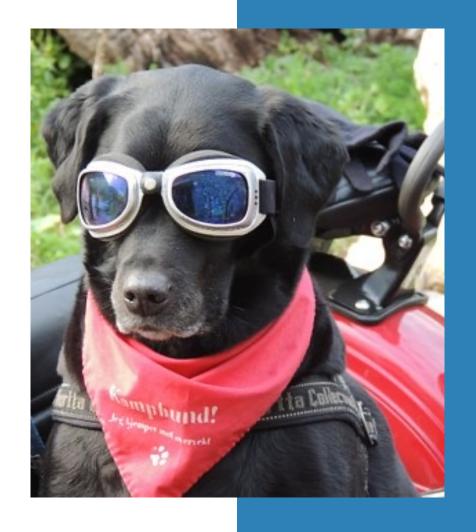


# Why do donors like monthly giving?

- Easy way to give like a subscription or payment plan
- Payment platform is very important
- Attracts wide demographic that may not give large gifts
- But can give in increments



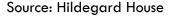
# Growth and retention require a driver and accountability





# Keep stewardship simple and doable







#### Try to automate as much as you can



Dear Friend.

You're about to change lives in a lasting way, and we are s

As a new monthly supporter, you're now part of a special difference in their community for neighbors in need. Neig

A 10-year Navy veteran, Brian struggled in the transiti uncompromising goal: feeding his 3-year-old son. But without success, and on the brink of losing their home turn. Then he found VOA. With meals, supportive hous regained his purpose and went on to build a new life!

Brian's life was changed for the better, because of others, though you may never meet them—a mom, an old precious second chance that will save their life, because of

Look for a letter in the mail from us soon, and, also, you c about your impact in the community. Again, we are so gla

Warmest Regards,

Mike King

President and CEO, Volunteers of America

P.S. You'll receive an overview of your giving for tax purpor questions about your monthly gifts, you can contact Lena 5000 or via email at <a href="mailto:ltroncoso@voa.org">ltroncoso@voa.org</a>. Thank you ago



Dear Friend,

Thank you again for your monthly support of Volunteers of America. Your compassion is powerful, helping us reach people with emergency support and essential services today and in the weeks ahead. Together, we're so much stronger!

A quick favor: Can you spare a minute for a short survey? Just three questions, very brief, I promise! It will help us learn more about what inspires you in terms of the kinds of work you like to support.

Click to take survey:



Thanks again for sharing your thoughts with us today!

Warm Regards, Lena Troncoso

Sr. Manager, Sustaining Gifts Program

Volunteers of America

Source: VOA

TKU +1 day after gift

Survey

+ 1 month & 1 day after gift



#### My Passion for Helping - Survey

Thank you again for sharing your thoughts today. Understanding what you're passionate about helps st readiness for when people turn to us in emergencies. Your responses will remain anonymous. Thank yo

1. When it comes to your passion for helping others, what best describes your motivation?

Please choose your TOP 2 selections.

Being charitable is driven by my values.

- I have been helped in the past and want to give back and help others.
- $\ \square$  Being charitable is driven by my faith.
- Helping people have access, equality and opportunity is the right thing to do.
- ☐ When I see people going through a difficult time, I want to help

Other (Please describe.)

2. Thank you again for the impactful action you took with your recurring support. Can you share what made yo

(Maximum response 255 chars, approx. 5 rows of text)

3. As someone who cares about dignity and health for all people in the community, what are the FIRST 5 WOR support a community-based mission like Volunteers of America?

le.

(Maximum response 255 chars, approx. 5 rows of text)

Your feedback is greatly appreciated today! Please let us know any additional comments:

# Engage monthly donors in affordable Ways

Source: Love Not Lost

Hey Heartbeat Members,

In case you didn't see it in the Love Not Lost newsletter, I am so very excited to invite you to our first Heartbeat connection this Friday at noon! If you can't make this one, we'll send out the next invite more in advance once we get into our rhythm, but please know there's no pressure to show up if your plate is full.

We'll be doing these gatherings every quarter so you can ask questions, get the scoop on inside stories, meet other Heartbeat members, and hear from special guests throughout the year. We hope you'll be able to see first hand the impact you have and keep a pulse on events within our community.

As the heartbeat within our chest is necessary to sustain life and allow us to love, so is the heartbeat within love not lost. And just as you bring life and love to the community we serve, we hope to bring life and love to you too. These meetings are just one way we hope to do that.

We want you to know how much we love and appreciate you and look forward to seeing you soon.

Here's the private zoom link you are welcome to share with your household members who might want to join us:

Join Zoom Meeting

https://us02web.zoom.us/j/86179674735?pwd=OTdxQityMHNVUTdRZ3J4NVJmTmRkZz09

We'll send out a calendar invite as well.

With love and gratitude,

Ashley

Founder, Executive Director
Love Not Lost
www.lovenotlost.org
678-521-5068
www.HowCanlLoveYouBetter.com



Happy monthly donors will give even more money and they will keep giving, and giving...



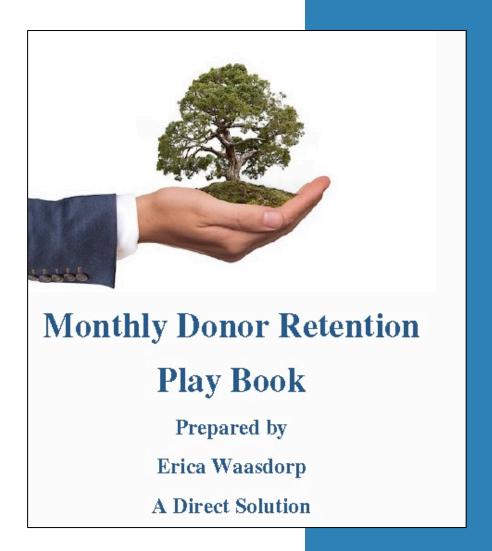


### Track monthly donor value/value at risk





# Do everything in your might to keep them!





## Key Takeaways

Generating monthly donors deserves focus

There are MANY tactics to grow

- Stewardship is key
- Watch payment trends and recapture
- Pick what you're comfortable with
- Then START somewhere!



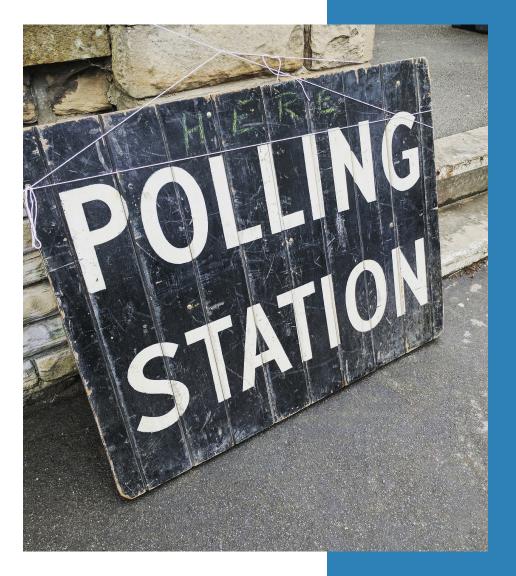






#### Poll

What will you do next?







"Great things are done by a series of small things brought together."

Vincent Van Gogh



QUESTIONS?

Now's let's hear from you!



#### Contact me!







# Erica Waasdorp

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<u>Download the monthly donor road map and more:</u>

www.adirectsolution.com





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