



**Week 5: How to Upgrade and retain monthly givers**  
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## ***Week 5: Upgrading and Retaining Monthly Donors***

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# Introduction

Here we are, at the end of our five weeks together.

What have you accomplished so far?

Here's a checklist.

Have you

	Made a donor survey?
	Made an FAQ about your monthly giving?
	Made a monthly giving appeal letter?
	Decided what premiums to give to monthly givers?
	Decided what to name your monthly giving circle?
	Decided what sort of different logo or branding this exclusive club will have?
	Decided how to recognize these donors in a special way?
	Decided who you can start cultivating to be a monthly donor?
	Created a case for giving monthly?

If you've done all of these things, then you are ready to move on to how to retain and upgrade your monthly donors.

Let's get started with a story about why I started, and stopped my monthly giving.

# Why do people stop monthly giving?

Let me tell you a sad story.

I moved from New York City to Portland, Oregon in the winter of 2001. It was really easy for me to find jobs in New York and I figured it would be a breeze to find a job in Portland. I didn't research the region's labor statistics at all. How wrong I was!

I had no friends, no family, and I was staying in a weird household with people who didn't like me. I basically stayed inside all day and applied for jobs. It was so grey and it just rained for 6 straight months. I thought I was going to die. I was so sad and lonely.

Then one day I took a walk and a friendly person approached me and asked if I'd like to give a monthly donation to ChildAid. I was so happy to see a friendly face that I said YES! Of COURSE! And signed up on the spot.

They sent me a picture of the child I was supporting, and I was grateful to be able to help someone go to school even as I felt pretty wobbly. Helping someone else made me feel good.

Of course, since I didn't have a job, I couldn't really afford to even give \$20 a month, which is what they signed me up for, and soon I had to cancel my monthly giving membership. When I had to stop giving to that child, they sent me another picture of her and asked me to reconsider, but I just couldn't find a job. I eventually moved to Korea to teach English, but that's another story. I felt really bad about having to cancel, but that time of my life was really difficult.

## **So why do people stop giving monthly?**

Perhaps because, like me, their life situation changes. When I started giving monthly, I thought I would find a job in no time. But I was wrong.

What I hope my story illustrates to you is that face to face fundraising really does help you get monthly donors. And sometimes when people stop giving, it has NOTHING to do with your cause and everything to do with their life situation.

Other times people stop giving monthly because their credit card expires, and they just forget to give you their new credit card number. Before their credit card number expires, there should be a reminder in your system to remind them to update their credit card number two months out.

Sometimes people stop giving monthly because they forget that they authorized the gift. This can be a lack of communication on the nonprofit's part. If you don't communicate at least monthly with your monthly donor, they might forget about you altogether.

Or they didn't feel properly thanked for their gift. Maybe they got a form email from you, and then never really felt thanked after that.

Maybe they don't feel a connection to your cause. What if they gave on a whim, or gave because they knew someone who was helped by your program, and a few months later, they are not friends with that person anymore, or they didn't really connect with you personally? Maybe they'll just stop giving. Maybe no one made the effort to get to know them, as donors, to try to figure out what their real motivations to give to you were.

How can you avoid these pitfalls?

# Avoiding the pitfalls of monthly giving

**You can't avoid people's life situations changing.**

Maybe when they joined your monthly giving program they were in an unstable place. If they do fall off in their monthly giving, and their card gets declined, you might want to give them a call and ask them if they're having any issues with their lives right now, and ask them if they'd like to give a smaller amount per month, like \$9.

## ***What if their credit card expires?***

This is scary. All this work, and then their credit card expires! You need to follow up before it expires and ask them if they'd like to put a new card into your system. If you have a good database, it should help you remember which donors are getting close to their expiration date. If there's nothing in your database to remind you of this right now, consider making a tag or field in your database that you can put monthly donors credit card expiration date in, so that you can run a report every month and see who is expiring and send a reminder note to them.

According to Erica Wasdorp, one of the ways you can mitigate their credit card expiring is to have a strategy and a process for every time this occurs.

Plan A:

1. Credit card expires or bank transfer stops
2. Email or Letter to monthly donor asking for updated information
3. Updated information received
4. Enter into donor database.

OR

Plan B:

1. Credit card expires or bank transfer stops
2. Email or Letter to monthly donor asking for updated information
3. No information received
4. Try calling at least three times
5. No response to phone calls.
6. Type stop date and reason for stopping into database
7. Put donor on reactivation campaign list.

## **How can you make a persuasive mailing to win them back again if their credit card expires?**

According to research from the DMA marketing conference, Habitat for Humanity tested two letters and one letter outperformed the other.

One letter looked like a normal letter, with just a standard greeting, paragraphs, and the obligatory signature.

The other letter had a column down the side of first names and initials, as well as locations, of people who left the monthly giving program and then came back. It then said, “Can we add your name to this important list?”

## **Which letter was the winner?**

The letter that shared “These are the names of “former monthly givers who left and then came back”

## **Why would this letter win?**

Because people like to do what their peers are doing. Your nonprofit is applying subtle social pressure when you publish the names of people who go away and come back.

It’s a bold move. It’s usual for a nonprofit to hide the names of people who leave, but this list leaves it out for everyone to see.

Publishing this list makes the lapsed monthly donor feel better, that the nonprofit doesn’t hate them, and they know sometimes we have ebbs and flows in our lives, and that they’re welcoming them back with open arms.

## **What do you think of this method?**

**What are you going to do if someone's credit card expires?**

Write your process here.

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*How can you help monthly givers feel more connected to your cause?*

**Creating those inspirational instead of transactional moments.**

What's an example of this?

Take a page from Oregon Active, a new, small nonprofit run by Devin Kelly. I interviewed Devin a few months ago and here's what he said.

**Create inspirational instead of transactional moments to keep your donors.**

**- Devin Kelly, Founder and Director, Oregon Active**

**Mazarine: What are some of the ways you engage Gen X and Gen Y to be loyal donors?**



Devin: Through our adventure therapy programs. So for instance, we just finished a stand-up paddle-boarding expedition, a disabled athlete named Nathan paddled from Eugene to Portland over 3 days, and we took our donors to celebrate at the end, to participate at the end, in a hands on way, and Nathan is going to lead everyone on a stand up paddle-boarding adventure for someone else who has a disability.

*People don't just see where their money goes, they actually get to be a part of it. That's where the disconnect is with a nonprofit, if you truly want to get involved, hands on where you're a part of the adventure, that's really helped us. Getting their donations by inspiring instead of soliciting. We'd rather just inspire them.*

**MT: I think it's innovative that you're doing this. I think a lot of nonprofits struggle to engage younger donors and make them care. It seems like you're doing this without a map. Have you ever heard of anyone else doing this?**



**DK: No, I haven't heard of anyone else doing this. That's why it is exciting and unique, and what we find that if they come on our adventure therapy programs, that might inspire them to become a big brother or a big sister or do more. It changes their perspective on their lives as well. If you spend an afternoon white water rafting with someone who is blind, it allows you to look at what you thought your excuses were. It inspires you, but on the flip side,**

**It inspires the person you're helping, because they are helping too. When they come on the trip, with someone with a disability, they help the next person on that trip. They're a part of the adventure therapy team. That's what I needed. I learned that when I was sick, I got over the fact that I might not be able to walk. But the part that killed me more than that, I couldn't do anything. I never felt like I was helping somebody.**

**Everyone wants to help.**

We don't just want to give you a rafting trip because you deserve it, but we want to get you involved as well. The people with disabilities feel like they're helping. And they are. Everyone is helping. We all have our issues, our life challenging conditions.

Ask someone in a wheelchair if they want to go rafting, and all the programs available are with 10 other people in a wheelchair, if they don't define someone by their disability, the only thing they have in common is that they are all in wheelchairs. We want to break down that wall. We are all here to whitewater raft.

We are not here to fix anyone, we are trying to provide an opportunity to go on outdoor adventures. They then get to help someone else instead of getting helped all the time. Not that they don't need it or deserve it, that's another way we look at it differently, we know that everyone wants to help. We decided to provide that platform for people who are disabled to help others if they want to.

**MT: What have you noticed as particularly successful fundraising efforts with these younger donors?**

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If you'd like to learn more about how to actually set up a monthly giving campaign and make it successful, check out the rest of the [Fantastic Monthly Giving e-course](#).

OR Check out [Fundraising Mastermind Elite](#), where you can get this course, (normally \$197) plus 10+ more courses and 60+ webinar recordings, for one low yearly price.