

Answers to 5 Key Questions About Monthly Giving

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As I'm sure you can imagine, fundraisers ask me questions about monthly giving all of the time. That's why I wanted to answer a few of those key questions.

1. What's the Best Time of Year to Ask for Monthly Gifts?

There is no bad time to ask for monthly gifts, but if you want to plan for prime times, they're September/October and February/March.

I love calling September "sustainer month." It's an ideal time to focus on monthly giving. The kids are back in school. People have returned from vacations. You're not yet in the heavy giving season. What is a better way to engage donors than by asking them to consider a monthly gift right now? Consider a small sustainer drive, integrating all your messaging, aimed at monthly gifts.

Then do the same in February/March. You may have recent one-time donors you can invite to consider converting to give monthly.

Related story: [How to Ask for an Extra Gift From Your Monthly Donors](#)

Having said this, if you want to grow your monthly donor program, you must ask your small donors as often as possible. It's so easy to build in extra monthly-giving buttons, so you're constantly planting the seeds about recurring giving. Just look at your annual communications plan and add some monthly giving campaigns and then make sure you do them. What do you have to lose?

2. What's the Next Big Trend When It Comes to Monthly Giving?

Instead of worrying about the next big trend, I think it's more important that each nonprofit looks at giving more opportunities for donors to consider a monthly gift. The good news is that I'm starting to see more of that.

- **Electronic bank transfer.** Nonprofits are offering an electronic bank transfer, aka automated clearinghouse (ACH), which is good news as that will help prevent expiring and declining credit cards. Some organizations have also started preselecting the ACH on their forms.
- **Texting.** More nonprofits can add texting to the mix and that's a great way to support a campaign.
- **Connected TV (CTV).** The larger nonprofits are successful in using CTV. It's much more expensive than mail, email and phone though.

The more important trend, though, is what you are seeing in your own nonprofit. What have you done to generate new monthly donors? Then consider adding a few more emails and seeing where you can add monthly gifts to your direct mail pieces. Oh, by the way, remember to repurpose your content. If you had an email that worked well for one-time gifts two years ago, can you use it again to ask for a monthly gift this time?

3. Can Donors Give Monthly From Their Donor-Advised Fund (DAF)?

Yes, donors can use their DAF to make recurring grants. They typically have \$50 a month minimum. Donors can choose other frequencies, and unfortunately, they can set an end date. It's important to always follow directions on how the donor wants to be recognized, but other than that, you can steward them like you would other monthly donors.

If you can, code them in your donor database as recurring DAF donors.

Just like with online banking donors who set up recurring gifts without telling you, you may be able to find these recurring donors by looking at trends in your donor database.

4. Are Workplace Giving Donors Recurring Donors as Well?

Just like with DAF monthly donors, these recurring donors come in through a different "system," if you will, so it's not feeding into the same bucket. You'll need to tally them differently. I'm going to assume that you're able to code them as such to pull separate reports. You may need to give them a separate attribute or group so you can segment them as needed.

For example, you can most likely pull a report from your donor database for your monthly donors and see how many there are, as well as their monthly and annualized value. Then run a report for your DAF recurring donors and your workplace givers and calculate the same. That will be your total of recurring donors for overall trend purposes.

The key question though with these types of monthly donors is how do you steward them. If someone makes a gift from their paycheck, absolutely consider them a monthly donor and let them know how special they are. If someone makes a recurring gift from their DAF, absolutely, recognize them as special. This leads to the next question.

5. Is There a Difference in Stewarding One-Time Versus Monthly Donors?

In the old days, we tried to leave monthly donors alone. Now, not so much. The minute someone starts making that first monthly gift, code them in your donor database and email program so that you can do something special.

Take some time and map out what you're sending to one-time donors during the year. Look at what other departments, like major gifts, are doing?

What can you borrow or implement? What can you customize for monthly donors with just a short intro message change? What can you add that makes the donor feel special? Perhaps a phone call, a text message or a handwritten thank-you card. What would make your nonprofit stand out? What would make the donor feel most engaged?

For example, if you have a print newsletter, send it. If you have email news updates, send them. All of those are totally great.

If your donors are used to receiving mail, and they haven't told you to stop sending mail, send them your key appeals. Add in a short message of gratitude and make it clear you're asking for an extra gift. But remove any reference to a monthly-gift ask from those appeals because they're already giving monthly.

Automate what you can. Then use opportunities that come up to do things that are surprising but are of interest to monthly donors who are invested and interested in what goes on. If you can send a text message, great. Do that. If you can send a video from the field, great. Do that.

Just remember that donors want to know their gifts matter. That's the key driver for all of your stewardship messaging. Make your monthly donors feel special.

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