

**A Nonprofit E-Book**

**SUSTAINER  
ESSENTIALS GUIDE  
AND CHECKLIST**

 **everyaction**

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 everyaction

A NONPROFIT'S GUIDE TO  
BUILDING A SUCCESSFUL  
MONTHLY GIVING PROGRAM



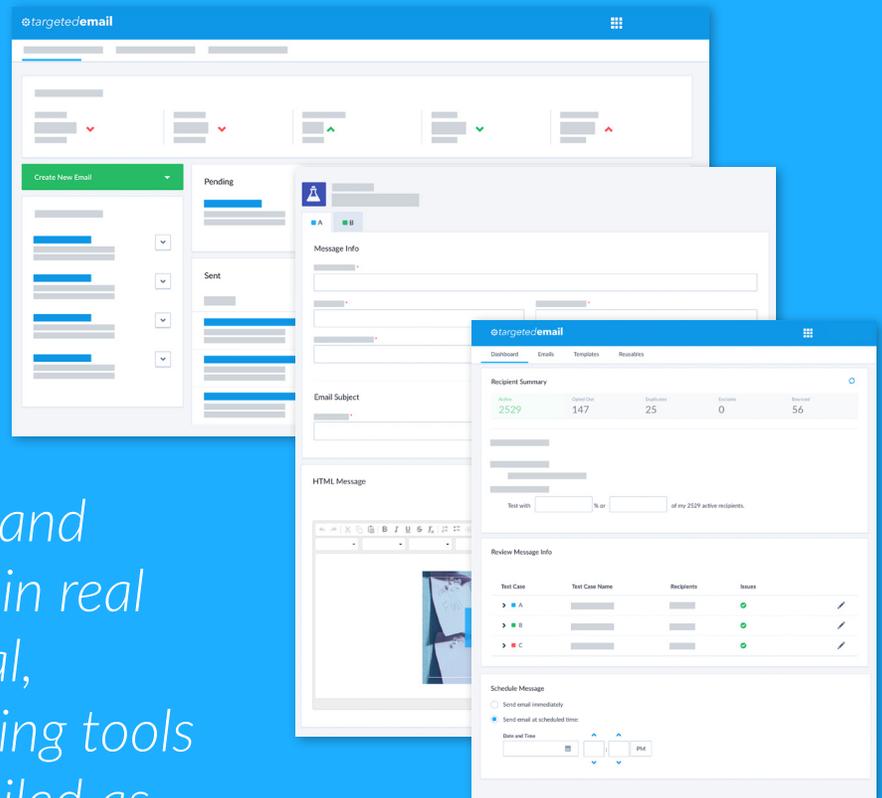
# ROADMAP TO RECURRING DONATION SUCCESS

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# MEET EVERYACTION

*Built & supported by nonprofit experts.*

*With EveryAction, nonprofits of all sizes can raise more money and maximize their impact in real time. In fact, our Digital, Fundraising, & Organizing tools have been routinely hailed as best-in-class.*



**TAKE A TOUR**

## THE CASE FOR MONTHLY GIVING

Monthly giving programs are continuing their stellar growth and delivering huge value for nonprofits of all sizes. Development teams are keenly aware that **monthly donors have better retention (they stay on the donor file longer) and provide higher lifetime value (they deliver more revenue over their lifetime) than regular one-time donors.**

So it's no surprise that nonprofits received 40% more revenue from monthly gifts in 2017 than 2016 (as reported by the 2018 M+R Benchmarks Report). Furthermore, monthly giving as a share of all online revenue rose from 14% to 16% in that same time period. And the average size of a monthly gift received from an email appeal is now \$18, also an increase.

**All of this adds up to continued excitement from development professionals and donors about monthly giving.** Nonprofits get a steady, predictable stream of revenue that can help them better budget and plan for the future, including weathering economic downturns. The most profitable programs are learning how to cultivate, retain and upgrade their monthly donors to even higher levels of giving. Donors report enjoying the extra flexibility to spread out their annual giving, often giving more over time.

In this guide, we'll discuss the key elements of a successful monthly giving program. Building and maintaining a monthly giving program isn't as simple as adding a button to your donation forms, it takes intentional time and effort to create an effective and profitable program. Whether you're just starting out with monthly giving, or are looking to grow an existing program, we're sure you'll find something useful to help your program succeed.

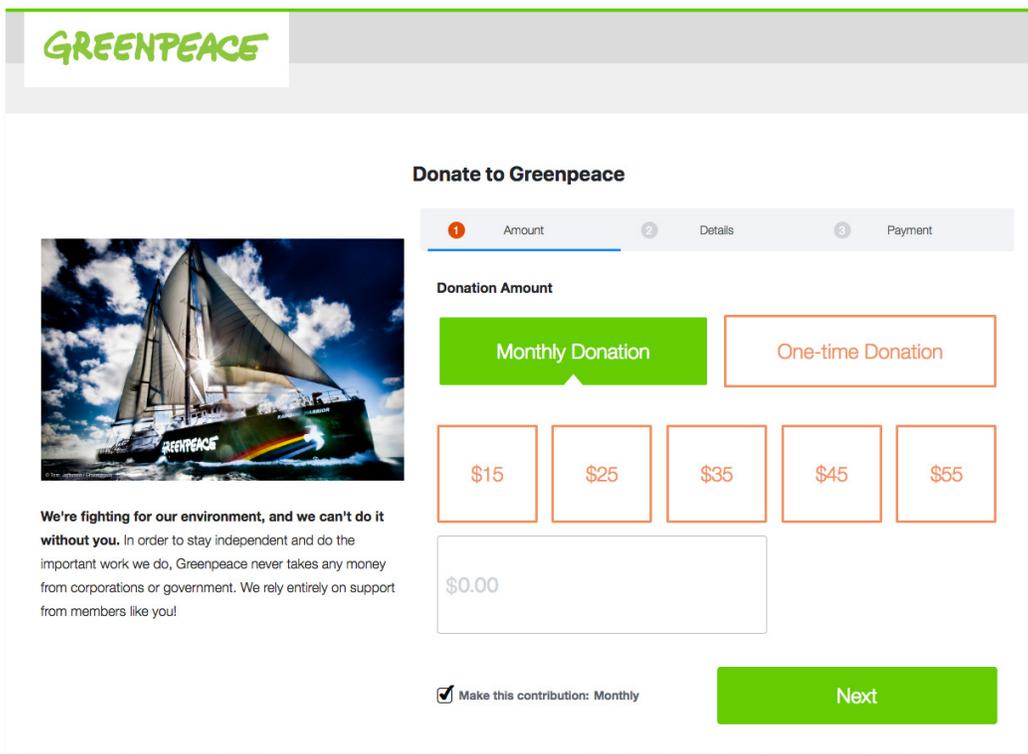
# RECRUITING MONTHLY DONORS

## Make Monthly Giving Fast and Easy

“Organic” monthly giving, where donors notice the “Give Monthly” check-box on donation forms and choose to select it, typically generates most signups for nonprofit organizations. This means that the best way to grow monthly giving to your organization is to make sure your main donation page is easy to find and use on all different screen sizes.

On your main donation page, make sure the monthly giving option is prominent and as easy to use as the one-time giving option. Many nonprofits offer a side-by-side toggle button to switch between one-time giving and monthly giving. This allows you to present different gift strings for these two types of giving, which can increase average gift size. Many organizations (such as Greenpeace USA, in the example below) are opting to make the monthly giving option the default, which will increase signups.

Be sure to promote the ease of changing or cancelling a monthly gift. In the age of Netflix and phone Apps, consumers are more careful than ever about monthly payments.



The screenshot shows the Greenpeace donation page. At the top left is the Greenpeace logo. The main heading is "Donate to Greenpeace". Below this is a progress bar with three steps: "1 Amount", "2 Details", and "3 Payment". The "Amount" step is active. Under "Donation Amount", there are two buttons: "Monthly Donation" (highlighted in green) and "One-time Donation" (outlined in orange). Below these are five buttons for donation amounts: "\$15", "\$25", "\$35", "\$45", and "\$55". A text input field shows "\$0.00". At the bottom left, there is a checked checkbox labeled "Make this contribution: Monthly". A large green "Next" button is at the bottom right. On the left side of the form, there is an image of a Greenpeace ship and a paragraph of text: "We're fighting for our environment, and we can't do it without you. In order to stay independent and do the important work we do, Greenpeace never takes any money from corporations or government. We rely entirely on support from members like you!"

## Create a Unique Monthly Giving Experience

Make monthly giving a club that people will want to join. Everyone likes to be part of a group, and branding your program in a way that will make it feel like an exclusive membership is a great way to attract monthly donors.

**To cultivate monthly donors into loyal supporters over the long term, you'll need to treat them differently than your regular donors.** Segment monthly donors within your email list, and send them emails that are branded specifically toward monthly donors so that they know they are receiving exclusive communications. Remind them that they should be proud to be members of your program by highlighting the work you are accomplishing and the impact that they are having.

To build the buzz, promote your monthly giving program in your regular e-newsletters, so your supporters are aware of the program year-round. Include a monthly giving "buckslip" in any mail pieces that go out of your office or mail house.

**SOME**  
So Others Might Eat

[DONATE](#)

[About SOME](#) [Success Stories](#) [Services](#) [Events](#) [Advocacy](#) [Volunteer](#) [Give](#)

## Monthly Giving

[So Others Might Eat](#) > [Give](#) > [Ways to Give](#) > [Monthly Giving](#)

You can provide consistent support to SOME with monthly contributions that are automatically deducted from your checking account or credit card. SOME's **Helping Hands Circle** offers an easy way for caring supporters to incorporate their support of the homeless and poor into their monthly finances.

### Join the Helping Hands Circle

To join SOME's Helping Hands Circle, please complete our [online donation form](#). You will retain complete control of your giving and may increase, decrease or suspend your contributions at any time.



### Already Giving Monthly?

If you are already [giving monthly online](#) and would like to make changes to your gift (new credit card, amount, date of gift or stop payments), please login to the [Gift Service Center](#). Please click on "View" under the "Actions" heading to make changes to your monthly gift. If you need to update your name, email, address or phone number, please click on the "Personal Profile" link.



## *Run Seasonal Monthly Giving Campaigns*

Another highly successful recruitment technique is running a short-term (usually a month long) campaign to promote your monthly giving program. Craft a campaign which includes messaging ideas and tactical approaches that you'll use to reach out to your donors, volunteers, email subscribers and social media followers.

While not all of these ideas are for everyone, here's a list of strategies, tactics and channels you can use to make your campaign successful:

- Use a goal, deadline and thermometer graphic to increase urgency for giving.
- Deploy an email series of four or five email messages spread over the month to the most active and the most recent one-time donors on your file, and to your non-donors who are action-takers. Then segment your target list with appropriate messaging to join, re-join or upgrade.
- Create a pop-up lightbox for your website homepage to draw maximum attention to the campaign.
- Ask a Board Member or business partner to provide a match challenge of \$100 per new monthly donor.
- Send a direct mail piece during the month to reach donors via the mail.
- Consider a telephone campaign to reach donors for whom you have permission to call.
- Use digital advertising through Facebook to promote the monthly giving campaign with your targeted donors.
- Use a premium gift to add an incentive to become a monthly donor.

## *Use An Email Series to Recruit and Upgrade*

Your email welcome series is the perfect place to promote your monthly giving program. Dedicate one of your emails in the series to introducing your program, the benefits, and its importance to your organization.

While it's common to make a one-time gift fundraising ask in an email welcome series, more organizations are switching to a monthly giving ask, as the smaller gift sizes allow donors the extra flexibility to spread out their annual giving in smaller amounts.

### *Advanced Technique: Upsell Donors*

Try using an upsell lightbox to encourage single gift donors to convert their donation from a one-time gift into a monthly gift. Donors are presented with a "pop-up" lightbox while making a donation on your website, with a recommended monthly gift amount that is proportional with their intended one-time gift. This technique has been found to increase the number of monthly gifts collected via a website donation page, over and above simply including a monthly giving checkbox on the form.

**TIP:** Make sure that your donation forms are clean, to minimize distractions, and simple, to ensure that donors can use them with ease.

*"EveryAction's interface is refreshing and huge for us. During the giving season, donors are really focused on your emails. They're on the go and often on their phone, so you're leaving a lot of money on the table if you're not catering to these individuals. So, across the United Nations Foundation, we're really excited that EveryAction's interface is so functional, refreshing, and responsive."*

**- United Nations Foundation**

## MANAGING YOUR MONTHLY GIVING PROGRAM

### *Keep Up With Credit Card Changes*

All of your hard work to attract monthly donors can be derailed by a lost or expired credit card. Don't depend on your supporters to remember to update their own information when they receive a new card. Use an automated credit card updater tool, to keep your credit numbers up to date.

For other circumstances that cause failed donations, such as donors cancelling their credit card, set up an automated email response that will let them know that their donation failed to process and prompt them to update their credit card information.

**It takes less time and effort to maintain a current donor than to attract a new one**, so make sure you're using the right automated tools to maximize the lifespan and value of the donors you bring in to the program.

### *Upgrade Current Donors*

Pay extra special attention to the upgrade request that you make to current monthly donors. They're a special group of supporters who appreciate the extra touch. When requesting an upgrade, choose an upgrade amount based on their current monthly gift amount and include that suggestion in the email you send them. Set up a special landing page so that the donor does not need to re-enter their credit card information to upgrade their giving.

## TRACKING PROGRESS

Pay close attention to how your monthly giving program is performing. Here are metrics you should pay attention to:

**Signup sources:** Keep close track of the origin of your monthly giving signups, as this will help you maximize your future growth efforts.

**Average gift size:** Monitor the gift levels and test techniques to increase these levels using slightly higher gift strings.

**Reduce attrition:** Track your efforts to reduce attrition in your monthly giving program due to failed credit cards.

**Maximize upgrades:** Keep close track of your upgrade efforts, as this is a sign of a healthy program and helps identify higher value donors.

**Congratulations!** You are well on your way to a monthly giving program that will increase your organization's revenue stream and grow your donors' loyalty to your work.

*"We love EveryAction's reporting functionality. It's user-friendly and we can easily customize reports as needed, giving us a complete view of our program."*

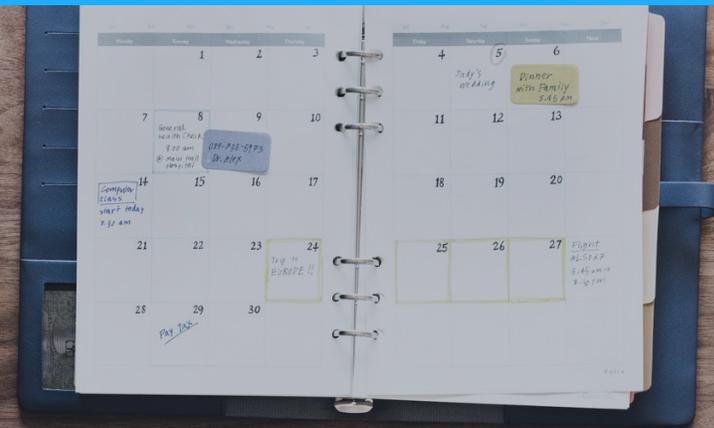
**- National Women's Law Center**

# EVERYACTION DEVELOPMENT

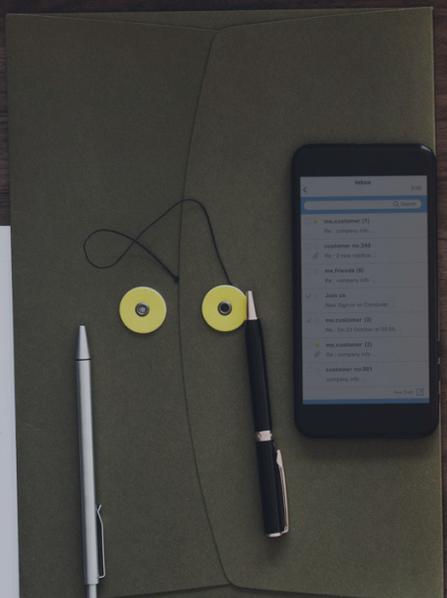
POWERFUL TOOLS & MODERN WORKFLOWS  
BUILT JUST FOR NONPROFIT FUNDRAISING PROS.

Discover a better, more user-friendly platform to cultivate donor relationships, track major gifts, run direct mail & telemarketing campaigns, run robust custom reports, and at the end of the day, raise more money.

TAKE A TOUR



CALENDAR						
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Taking Your Sustainer  
Program to the Next Level:

# A Nonprofit's Guide to Advanced Monthly Donor Fundraising

 everyaction

*About the Author*



## Melissa Wyers

**EXECUTIVE DIRECTOR**

Melissa is widely respected as one of the top practitioners in the nonprofit fundraising and marketing world. She brings more than 20 years of experience helping nonprofits increase their revenue and build their supporter base. For the last 9 years, she was the owner and President of Breakthrough Strategies, a fundraising, marketing and communications agency developing multi-channel programs for organizations like National Geographic, Heifer International, and the World Food Program.

## Introduction

Monthly giving programs, a staple of many nonprofit Development programs, are rapidly establishing prominence as an integral part of cause-driven fundraising. As the nonprofit sector shifts focus toward donors' lifetime value, sustainers and other regular givers are now often being approached with methods similar to their major donor peers.

According to M+R's annual study of nonprofit data, nonprofits received 40% more revenue from monthly gifts in 2017 than 2016, and monthly giving as a share of all online revenue rose from **14% to 16%**. Part of this can be attributed to shifting donor demographics—more than half of millennials are

interested in monthly giving as a way to support the **causes and organizations that they care about**. As charitable giving targets continue to include larger shares of Millennial donors and digital fundraising technology increases the ease of making and processing automatic donations, monthly giving is poised to become an even more important facet of nonprofit fundraising.

For organizations ready to embrace the rising tide of sustaining donors, the time for improving sustainer programs with new technology and techniques is now.

# 1

## Attracting Donors Like a Pro

### DONATION FORMS

Attracting sustaining donors goes far beyond simply having a “Make this contribution monthly” check-box on a website’s donation forms. To effectively grow a strong monthly giving program, more intentional and aggressive promotion is necessary. It is important to provide a clear interruption or prompt during the giving process, to draw attention and provide an argument for monthly giving. In a 2018 recurring giving benchmarks study, researchers found that by using a pop-up prompt that appeared as soon as a one-time donor clicked “submit,” which explained the value of a recurring gift and suggested a monthly amount slightly lower than the initial gift (but with a higher annual value), they were able to

create a [64% increase in recurring donor conversions](#). Additionally, this experiment did not impact their form’s overall conversion rate, suggesting that it had no deterrent effect on donors who still went on to make one-time contributions.

Using a donation form where users can easily flip the ask stream between the options for one-time and monthly giving is another easy way to highlight recurring giving in a more prominent way. For example, Greenpeace USA’s donation forms offer a clear choice for users, and also have a monthly giving check box on the one-time donation screen, giving two prompts for sustained gifts.

### Donate to Greenpeace



**We're fighting for our environment, and we can't do it without you.** In order to stay independent and do the important work we do, Greenpeace never takes any money from corporations or government. We rely entirely on support from members like you!

1 Amount    2 Details    3 Payment

**Donation Amount**

Monthly Donation    One-time Donation

\$25    \$75    \$100    \$250    \$500

\$0.00

Make this contribution: Monthly

Next

## MESSAGING

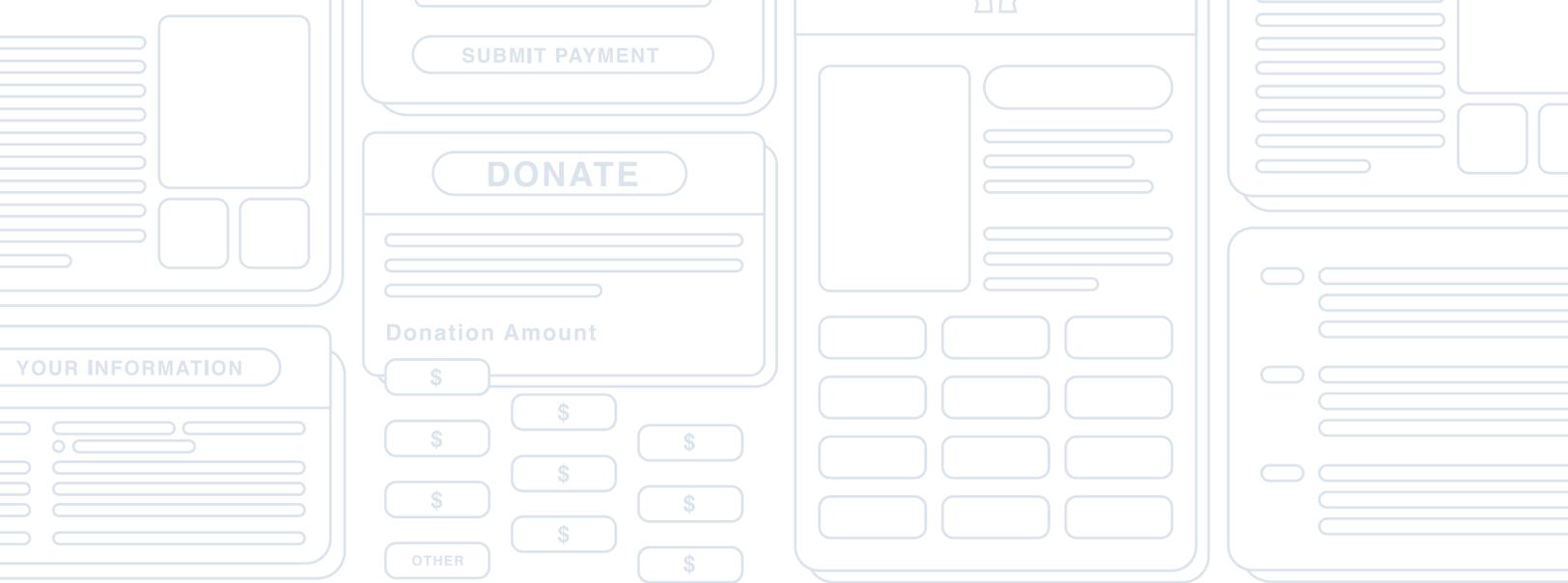
Another technique to improve sustainer attraction is to **test and use language which assures donors that they are in control on their donation**, letting them know that they can stop or change the amount of their donation at any time.

It is a common online shopping practice to guarantee free return of the merchandise if customers are unsatisfied, based on the knowledge that customers are more likely to buy a product if they feel that they have flexibility within their commitment. While most will not change their minds, the knowledge that they are able to will often make donors more willing to opt-in to long-term giving. Test language on your giving page that includes the assurance that they have control over their monthly donation – this may be enough to make more new donors comfortable committing to a recurring gift.

**Creating urgency is an important part of any fundraising process, and this is especially true for sustaining donations.** It requires nuanced messaging to communicate both urgent need and the necessity of long-term, reliable support. Striking the balance between these two principles can be difficult, which is why testing is so important. Whether it is the language on your landing page, in an email or social media, testing different messages is always the way to determine the most effective way of moving your supporters to action. When messaging is carefully tailored to communicate the need for support that is both urgent and ongoing, your monthly giving program will be successful.

***Pro Tip:** Don't get too detailed or specify how the process works at this stage! Too much information is not convincing—keep it simple and direct.*





## 2

# Retaining Donors for the Long-Term

## DATA & REPORTING

For strong sustainer programs, attracting new donors is only the beginning of the process. It is crucial that their experience as sustainers brings them ongoing joy and fulfillment, ensuring that they continue their donation for the long term, and setting the stage for successful upsells later on. Many monthly giving programs put substantial effort into drawing donors in, but fail to put the same amount of effort and intentionality into making sure that they have a positive experience throughout their tenure.

The backbone of a solid strategy for retaining monthly donors is collecting solid data through regularly reporting on the program status. It is critical to accurately track core metrics such as:

- Average monthly gift amount
- How many new sustainers have been brought in
- How many payments went through
- How many cards were declined
- How many credit card numbers were updated or brought back after lapsing

Regular reporting allows staff to track the program's health and developments on a monthly or weekly basis and quickly identify potential problem areas, or room for growth and improvement. When you collect the appropriate data to evaluate your program, you will be able to confidently take steps to improve your retention practices. Once you have determined where to focus your efforts, move on to adjusting your language and messaging.

## MESSAGING

**Stay in regular contact with your sustainers**, beyond your regular email list communications. Tailored messaging that highlights the specific impacts that sustainers have on the program not only provides constant marketing for your sustainer program, but shows your appreciation for their contributions by offering customized content. When communicating with sustainers, always show both gratitude and appreciation for their support, and clearly communicate the achievements that their support has allowed your organization to accomplish. Be specific, with both quantitative and qualitative data, and schedule this type of communication regularly—not just at year end.

**In the acknowledgment email to a new monthly donor**, make it very clear what they have signed up for. Rather than just saying thank you, make sure to clearly restate their commitment. If they've made an error in their donation, it's to your benefit to correct it earlier rather than later, and it also sets the tone for the rest of your interactions—that both parties view this as a commitment to an ongoing relationship.

**Personalized messages** are an effective way of showing appreciation, and in many cases are becoming an expected norm as technology advances. In the age of big-data, supporters know that the organizations they interact with collect data on their relationships, and expect it to be used in ways that communicate awareness and gratitude for their support. Consider using data such as how long someone has been a supporter and the amount of their average gifts to segment your list and provide content specifically targeted toward these types of supporters.

**It is almost impossible to say “thank you” too much**, and most nonprofit aren't doing it often enough. People love to be thanked, and monthly donors are no exception. Include appreciation for their commitment to your organization in all of your communications with them.

## TECHNOLOGY & TOOLS

**Some of the nuts and bolts** of retaining sustaining donors simply require logistical solutions.

**To re-engage lapsed donors, be aggressive (but always nice) and engage right away.** Sometimes, credit cards donors lapse because they've reevaluated their giving priorities, or because they've had a change in their financial situation, but more often, monthly giving simply lapses because of credit card issues. In these cases, it is especially important for an organization to be proactive about regaining the donor. When a credit card is lost, stolen, or expires, and is reissued—many donors forget that they need to update the information in order for their gift to continue. XX's study found that nearly 25% of organizations did no outreach to prompt donors with declined credit cards to update their information—**not even sending an email**. This is a big mistake—sustainers are supporters who care strongly about your organization's mission, and reminding them to update their donation information is a service that they'll appreciate when it is handled correctly.

Having a self-service portal is an extremely convenient way to allow donors to update their contact and credit card information if they move or are issued a new card. A self-service portal also gives donors a sense of control and efficiency, increasing their trust in your program. For cancellation and changes to donation amount, however, it

is still important that donors talk to a member of your staff if possible—allowing you to troubleshoot problems that they experience and possibly fix any problems that led them to this point.

Even more effective than having a self-service portal, is having a software that allows for **automatically updating credit card numbers**. Such software is widely available, but still largely underutilized in the nonprofit sector. When credit cards are re-issued for fraud or expiration, the credit card company will automatically tokenize them, and allow organizations with recurring donations to automatically continue using them—updating the record with no action needed on the staff or donor's part. Though using such a tool will likely require a fee, it will almost always pay for itself easily through retained donations.

Finally, if someone truly does need to cancel their donation, it is always best to direct them to call and speak with a member of your team to facilitate this. This gives you the ability to troubleshoot with them, if there is a way to fix any issues that they are having, and also allows you to collect data on the reasons that people give for leaving. Solutions such as suspending monthly donations for a set period of time, or reducing the amount of a monthly donations can be effective options when presented by a member of your donor services team.



3

## Effective Sustainer Upsells

When someone has been attracted and successfully retained as a monthly donor, the next step in maximizing your sustainer program is to upsell them to a larger monthly amount. This must be done carefully, but when executed with precision, is an indispensable part of a strong monthly giving program.

### IDENTIFY & SEGMENT

The first step is to find out who in your program should be targeted for sustainer upsells, and communicate with them through careful segmentation and testing. When looking to identify good targets for upsells, it's extremely important to segment your list carefully and effectively. For instance, within the pool of donors who are giving \$12 dollars a month, there may be donors who are ready to give closer to \$500 over the course of the year, and there are likely also people for whom \$12 a month is an extremely generous gift. Upsell messaging for them may come off as pushy or ungrateful for the sacrifices they are already making. When looking for appropriate upsell targets, look for:

#### Giving Potential

Use a tool like WealthEngine to determine lower-level sustainers with higher ability to give

#### Long-Term Donors

Has someone a monthly giver for more than two years? There is a definite relationship between the length of time that someone has been supporting your organization, and where you fit into their list of priorities. For donors that have shown through long-term dedication that they are truly committed to your cause, an upsell may be appropriate.

#### Comparison to Similar Donors

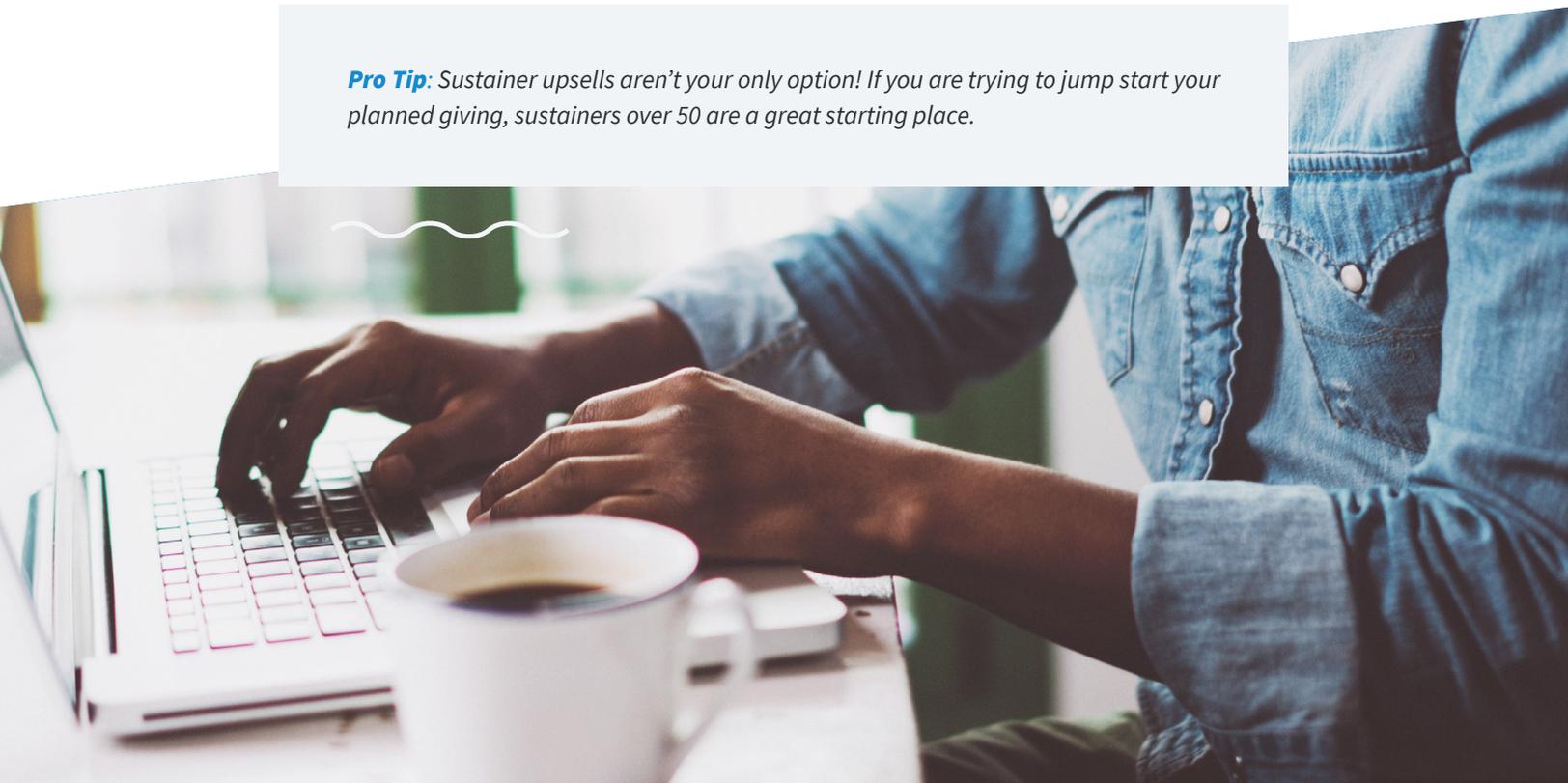
A more advanced method of identifying potential upsell targets is to go back and look at where donors were originally acquired, and compare their current giving level to others who came in under comparable conditions. Mid and high performers are also prime targets to move up the ladder.

## MESSAGE EFFECTIVELY

Once the prime targets for sustainer upsells have been identified, it is important to pay extra care to the messaging used. The goal is to persuasively convey the importance and urgency of giving at a higher level, without communicating ingratitude for their current support. Here are some tips to use in your sustainer upsell messaging:

- Peer messengers: Try using another monthly giver as the messenger for your appeal—someone who can talk about why they are a sustaining donor and why they're committed to the organization. How many new sustainers have been brought in
- Never underestimate the value of saying thank you. Show gratitude through multiple channels, just like the rest of your campaigns, and do it all year-round. Getting a phone call from a volunteer, out-of-the-blue and just to say thank you can make a world of difference.
- Focus on impact, showing supporters how they can make more of a difference through their increased donation. This is often simpler for social service groups (who can use definitive numbers, such as “we fed 500 people this month, but there are 800 more in need”), than groups with broader advocacy focus areas. For this type of organization, find ways to quantify your efforts by telling the story of one impacted individual, and highlighting how much more work is yet to be done. Telling the stories of people whose lives have changed “because of people like you” and illustrating that you need more resources to go further can be very effective messaging for this donor base.
- What doesn't often work for this type of messaging is “we have a match” or “time's running out to hit our deadline” messaging. People are usually only sustainers to a maximum of three organizations, so your mission is most likely a real priority for your donors, and mission-focused message is likely to be more effective. A cause-driven nonprofit is a donor's vessel for accomplishing what they want to do in the world.
- Test! Test everything to determine what works for your specific audience.

**Pro Tip:** *Sustainer upsells aren't your only option! If you are trying to jump start your planned giving, sustainers over 50 are a great starting place.*



**everyaction** Demo

Main Menu / Janet Smith / Edit Action Plan

**Edit Action Plan for Janet Smith** [Cancel] [More] [Save]

Status: **Cultivation** (20% Probability)

Days in Status: **24 Days** (Since 1/30/2017)

Ask: **30K** (1/19/2017)

Highest Prev. Contribution: **25K** (2/4/2016)

Most Recent Contribution: **1K** (10/17/2016)

**Janet Smith**  
 (312) 284-7702 (Home)  
 WillisRSmith@cuvox.de (Personal)  
 2520 Cecil St (Home Address)  
 Chicago, IL 60601

**Plan Details**

Campaign: Defending Polar Bears

Designation: People For Good Designation

Primary Solicitor: Jones, Smith

Secondary Solicitor(s): Qzak, John

Start Date: 11/21/2016

Status: Cultivation

Status Date: 1/30/2017

**Plan Ask**

Ask Date: 1/19/2017

Ask: \$30,000.00

**Follow Ups** (This Action Plan Only)

Date	User	Type	Priority	Notes	
2/20/17	Rawlins, B.	Meeting	Medium	Lunch with Janet to review the plans for the Arctic education project.	Edit Cancel
3/2/17	Rawlins, B.	Phone	Medium	Call Janet to see if she has any questions about the plan we presented.	Edit Cancel

Schedule Follow Up View My Follow Ups

**Contact History** (This Action Plan Only)

Date	User	Type	Result	Notes	
1/2/17	Jones, S.	Meeting	Canvassed	Met with Janet over coffee. Notes about her thoughts on our new education program are attached...View More	
12/27/16	Jones, S.	Phone	Left Message	LM about scheduling lunch after the holidays	Delete

Add New Contact More

**Notes** (This Action Plan Only)

BR Janet's ex-husband is on our Board, but they don't keep up with one another.  
 Entered By: Belinda Rawlins - 2/23/17

# EveryAction Development

Powerful tools & modern workflows  
built just for nonprofit fundraising pros.

Discover a better, more user-friendly platform to cultivate donor relationships, track major gifts, run direct mail & telemarketing campaigns, run robust custom reports, and at the end of the day, raise more money.

**Get a Demo**



# Checklist: Essentials for Building and Optimizing Your Sustainer Program

## Growing Your Sustainer Program

- Optimize your donation page for sustainers
  - Make monthly giving the default option
  - Add a pop-up lightbox prompting one-time givers toward sustainership
- Create a workflow that will automatically begin sustainer outreach to [likely monthly donors](#)
- Make monthly giving a club or society that your member will want to join, and promote it regularly in your newsletter and other communication channels
- Include a monthly giving buck slip in any mail pieces you send
- Build short-term, seasonal campaigns around increasing your sustainer base
- Use a premium gift to incentivize monthly giving

## Retaining Your Sustainer Base

- Automate donor cultivation to maintain your sustainer base
- Re-capture lapsed donors with automated triggers
- Run upgrade campaigns when appropriate

## Keep Up with Credit Card Charges

Offer a self-service portal

Use an automatic credit card updater

## Tracking and Reporting

Track the sources your monthly donor sign-ups are coming from

Successful payments

Track average gift size

Declined payments

Track donor attrition

Updated credit card information

Track donor upgrades

# everyaction DonorTrends

**DonorTrends** on **EveryAction** puts predictive power behind your fundraising program. Take the guesswork out of fundraising and improve retention, increase donor value, and raise more money.

[LEARN MORE](#)

