

A Baker's Dozen of Tips for a Sustaining (Monthly) Donor Program

1. Make monthly/sustaining giving a prominent option on all donation materials

Both your printed donation forms and online donation forms should prominently feature monthly donations as an option.

Don't make this an afterthought when designing these forms. Whoever does the design should know that your top preference is a sustaining donor.

2. Give them multiple options

Don't rely solely on either credit card donations or automatic withdrawal from checking accounts. Allow donors to use either option.

And don't get hung up on "monthly" as the only sustaining option. Some donors will opt for quarterly on a sustaining basis and that should be an option if feasible.

3. Make some of your asks explicitly about sustaining donors

While many if not most of your "asks" will be more general, a few asks should focus on sustaining donors.

- This could come in the form of an email campaign to past donors (e.g. "we're working to recruit 25 new monthly donors by the end of January.")
- You could make the same pitch via mail to a targeted set of past donors.
- You can hold a phone bank calling past donors asking them to give monthly.
- You could make the pitch for sustaining donors the focus of a house party ask.

4. Segment your lists to focus requests for sustaining donors on the most likely participants

Overwhelmed by the idea of calling all your past donors to ask them to become sustainers? Call only those most likely to say yes (e.g. have given 3+ years in a row or 2+ gifts in the last year)

5. Make the case for monthly giving

You should have at least two clear talking points.

One should be about why sustaining donors are great for allowing the organization to make a bigger impact.

One should be about why giving on a monthly basis is easier/better for the donor.

6. Thank sustaining donors

Thank your sustaining donors. Better to over-thank them than under-thank them.

As a general rule, that should mean an automatic email thank you when they sign up online.

And a printed/mailed thank you from their first gift.

And finally, an annual thank you mailed in late December or early January thanking them for their total monthly giving over the prior year.

7. Celebrate sustaining donors

To generate more sustaining donors, celebrate the ones you already have.

Recognize them as appropriate. For example, if you recognize your major donors in an Annual Report, do the same with sustainers.

Profile a monthly donor (or two or three) on your website and share these profiles via your monthly or other email updates. The profile could be a Q&A with the monthly donor, written in the third person about the monthly donor, or written by the monthly donor in the first person.

Brand the program with a positive name. I've heard of sustaining donor programs called "Rock Stars," "Evergreen Society," "Sustaining Circle," and "Leadership Circle," among others.

8. Don't treat your sustainers as regular donors

If you're doing an appeal targeted to your regular members asking for donations, pull out your sustainers. One of the benefits to sustainers of giving monthly should be that they won't get regular asks. That doesn't mean you can't occasionally ask them for a gift on top of their monthly donation, but don't make a habit of it.

9. Cultivate monthly donors

Once you have them signed up, you should continue to cultivate them so that they will remain on your list and consider bumping up their giving in future years.

Like all cultivation, it should be designed to strengthen their understanding of the work you do and its importance, while having them feel appreciated as a person and not a checkbook.

So if the sustainer is giving at a level that would generate cultivation as a major donor (if given all at once), treat them as a major donor. They are!

Consider giving your sustainers an invite to some special briefing or happy hour targeted at them. Or send your sustainers a separate online survey seeking their input about something.

10. Automate the monthly donor process

As you grow your program, it's really critical that it doesn't become an administrative headache.

Online sign-ups to be a monthly donors should be processed automatically into your fundraising database and future monthly donations should happen without you having to manually trigger them.

Printed sign-ups to be a monthly donor (whether credit card or via a checking account authorization) should require you to manually process the initial donation, but future ones should happen automatically, just as if they had signed up online.

11. Act immediately if credit cards expire

Expiring credit cards are the biggest reason groups hemorrhage monthly donors.

Every month, you should be emailing/calling sustaining donors whose credit cards are about to expire to update their credit card expiration.

12. Ask sustaining donors to increase their giving

Don't assume that a \$5/month or \$10/month sustainer will only give at that level. Ask all sustainers once per year to increase their giving level.

This can be done as part of the annual thank you letter (see tip #6).

Or alternatively, consider a once per year "thank you and ask" call requesting an increased giving level.

Of course, if increasing their monthly giving would put them into the category of a major donor, you should be pursuing them as part of your major donor plan, which most likely involves a one-on-one in-person ask.

13. Have clear roles/responsibilities

This last tip probably belongs to all aspects of your organization, but is worth emphasizing here: have clear roles and responsibilities.

Since sustaining donor programs tend to not be one of the top few fundraising strategies for most organizations, it's easy for them to get lost in the shuffle. Make it clear who has primary responsible for growing your monthly donor base and implementing a short plan to do so. The plan should spell out who will do what pieces.