

Week 3: Welcoming your new monthly givers
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Fantastic Monthly Giving E-Course
Week 3: Welcoming New Monthly Givers Page 1

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Introduction.....	3
How to write a series of welcome emails.....	4
How to create a cost-effective welcome kit.....	12
Engaging monthly givers after the honeymoon period.....	15
Creating branded communications for monthly givers.....	17
Conclusion.....	23

Introduction

“We wanted to be seen as effective (doing the right things) and efficient (doing things right).”

-David Love on the World Wildlife Fund Welcome Pack

This quote above describes the purpose of every communication that World Wildlife Fund sent to its monthly donors.

Please consider this quote. Can you make your every email, every note, and every phonecall emphasize that your charity is doing what is effective to solve the problem, or being more efficient thanks to your donor's monthly gift? Why not flatter and excite your donor as you share these two ideas?

In this week, we're going to be covering how to make your donor feel welcomed into your family as a monthly giver. They deserve special treatment!

How can you make your donor feel special, without breaking the bank, and without driving yourself crazy with too many cultivation activities?

We'll be talking about cost-effective welcome packs. Automatic emails to your donors. And building a once or twice yearly friendraiser activity into your monthly donor plan.

Let's get started!

How to write a series of welcome emails

When you start emailing your monthly donors, what do they really want?

You need to target new donors during the 'honeymoon phase' when they've first made a gift to your organization using a series of welcome emails built around telling your new donor how their gift is making a difference.

Email 1: You are Helping Not just X but Y!

Does your mission help more than one kind of person? Make your new monthly donor feel good by telling them how their gift is making a difference in unexpected ways. If one part of your mission is more prominent than another, then how about telling them how they are helping another group of people?

Your Email 1 Subject Line: _____

Who do you help at your nonprofit? _____

Is there a secondary group that you help? _____

Do you have a story or picture about that group?

What's the story?

What's the picture?

Here's a lovely example from HOPE Inc. The subject line of their email was "Did You Know?"

Did you know that YOU help children with HOPE?

by H.O.P.E, Inc. (Helping Other People be Empowered)

Did you know?

When you give to HOPE, you not only help parents finish school, you help their children develop through childcare!

Meet Baby Carter!!



We've got a new partnership under wraps with a new early childhood education center to help serve even more children or parents in our program. Stay tuned!



What would you do with HOPE?

We're hoping you would consider giving hope through our [Giver of Hope](#) monthly donor program. Your donation, large or small, keeps low-income children from becoming a statistic.

Email 2: Your Nonprofit's Efficiency thanks to your donor

You should ALWAYS include how monthly giving helps you be more efficient with your nonprofit dollars.

Make sure you thank your donors for helping you be more efficient, sending fewer unwanted communications including telephone calls, direct mail, reminders, and more.

Show the donors a chart that explains, "If even half of our donors gave monthly, like YOU, <donor name> then our nonprofit would save \$20,000 per year!

Thank you so much for helping our nonprofit save your donation for what matters most, helping (insert your mission here)

What will YOUR email 2 say?

Email 3: The Survey Email

When you create a survey in surveymonkey, try to keep the number of questions down to one page. Use multiple choice answers instead of text fields. People are lazy, and if they can just click a button and get out of there, that helps them finish your survey.

This survey should make clear that you will only talk with your monthly donor when they want you to. So in order to be respectful of your monthly donor's needs and boundaries, just like in a good relationship, you need to get clear on their communication preferences.

Sample survey questions that you can totally steal:

How would you like to be contacted? (Check all that apply)

I like:

The phone. Here's a good number for me _____

Here are days and times I prefer to be contacted. _____

Email. Here's my preferred email. _____

Snail mail. Here's my preferred address. _____

Social media: Facebook/Twitter/LinkedIn/Other

Other: _____

I do not wish to be contacted.

How would you like us to acknowledge you? (Check all that apply)

In your annual report

On our website

Via snail mail, with a thank you letter, every month.

Via snail mail, at the end of the calendar year, totaling my donations for the year, for tax purposes.

Other: _____

I do not wish to be acknowledged/I wish to be anonymous.

Optional: You may wish to add:

Do not disclose the amount of my donation publicly

Do disclose my donation amount publicly

How did you first hear about us?

TV

Radio

Newspaper

Internet search

Facebook

Email

Friend _____

What made you decide to give monthly?

Wanted to be more considered with my charity, giving where it can do the most good

Wanted to help your nonprofit be more efficient, spend less on fundraising and spend more money to help <X>

I know someone receiving your services and this seemed like the best way to give

Your cause aligns with my faith and my values

Other _____

How do you like to be involved with nonprofits?

I would like to volunteer, please send me more information

I would like to help out at a fundraising event, please contact me.

I would like to give an in-kind donation, please contact me.

I would like you to come and speak at my church/company. Please contact me.

Other _____

Just donating is fine.

Email 4: The Follow-up email

After people have answered your survey questions, you can send them one of these emails.

The Volunteer Opportunities Email

Do you know anyone who would like to volunteer? Here's how they can get involved. Examples:

Join our speakers bureau!

Share with the community why this cause is so important. Call XX-XXX-XXXX and speak with our volunteer coordinator, <name> and we will get you started!

Answer phones in our office, help us stay organized, help us enter donations, pick up auction items, part-time receptionist, etc. Call XX-XXX-XXXX and speak with our volunteer coordinator, <name> about days and times you can come in for a volunteer interview.

Party with us at our next friendraiser, help us with logistics, potluck items, registration, and more! Call XX-XXX-XXXX and speak with our fundraising director, <name> about our next fundraising event!

Group Volunteering/Family Volunteering: Would you like to speak with someone about your church or company or family volunteering? Give us a call at XXX-XXX-XXXX or email us at _____ and we will get right back to you!

Other Volunteer Opportunities:

In-Kind Donation Email

You indicated that you would like to give an in-kind donation to our nonprofit.

We need these in-kind items:

<Insert your list here>

Which one would you like to give?

When can you come and drop it off?

Would you like us to come and pick it up?

Anything else you'd like to add?

Speaking engagement at their company/church Email

Here are followup questions that you can put in a separate online survey or in an email to the survey respondent.

Where is the speaking engagement going to be?

What date and time are good for your group?

Do we need to bring our own projector?

How many people will be at this gathering?

Who is the point person to organize this gathering?

What is their contact info?

Can we have a table to distribute our literature during the presentation and after?

How does this group of people generally like to be involved with nonprofits?

Anything else you would like us to know?

Email 5: The Event Email

Here's our list of events for the year! Come on out and say hi?

Your event list:

Event Name	Date
Example: Friendraiser at McMillan Park	June 25, 2014

If you can give them a link to RSVP to one or all of these events, that's even better, to help you plan out your guest list, food, seating (if applicable) and more.

Remember the words of David Love on the World Wildlife Fund's welcome kit for new donors, “*We wanted to be seen as effective (doing the right things) and efficient (doing things right)*”. Can you look at your communications with your monthly donors now, and say that each communication enforces either one or the other of these ideas about your nonprofit?

How to create a cost-effective welcome kit

Your welcome kit sets the tone for your donors to interact with your nonprofit. It is the direct mail equivalent of a handshake and a hug, and you want to make it seem as bright, upbeat, and exciting as possible.

Of course, we don't have unlimited money to spend on these things, so how can you keep the costs down, while simultaneously making your donor feel special?

How can you use your welcome kit not just to welcome your donor, but to remind them to feel good about giving to your cause?

When you think about what to offer your monthly donors, think about what people look at all day.

Their fridge? What about a magnet? Don't think that your nonprofit has to be related to food to use a magnet. Lots of people use magnets. The ASPCA (an animal nonprofit) for example sends out magnets of cute puppies and kittens, and it's hard to forget them when you look at your fridge all the time!

Their desk? What about a pen? A mousepad? (The Cat Adoption Team uses a CafePress store to manufacture mousepads and other items for their donors.)

Their mailbox? What about a note that they can send? (Amnesty International has a lovely package that includes a note donors can send to give hope to those that they serve.)

Their car? What about a bumper sticker? (How about some free advertising for your nonprofit?)

Their clothes? What about a T-shirt? (You may wish to save this for your largest donors, but this can again be free advertising for your nonprofit.)

What should go into your cost effective welcome kit for monthly donors?

Check all that you wish to include in your welcome kit:

Include?	Item	Cost
	A handwritten thank you note from your executive director.	Negligible

	A sticky note reminding the donor about your next open house	Negligible
	A link to free desktop backgrounds or screensavers. Could you include a link to a hidden page on your website to get give high quality images for people's desktop backgrounds?	Negligible
	A blank postcard with a cute picture of your cause on the front.	Can print inhouse
	A membership card (could be die-cut into your welcome letter, could be plastic)	Can get quotes for this
	A blank card with an image of your cause on the front, plus envelope, for the donor to send to someone else.	Can print inhouse or get quotes
	A pen with your nonprofit's name and logo on it, or the name and logo of your monthly giving program.	Could cost as little as .19 -.25 cents per pen.
	Free pair of drink tickets to your next friendraiser/fundraiser	Negligible
	A Sticker with the logo of your nonprofit monthly giving program on it.	.25 -.50 cents per sticker
	Magnet with your nonprofit slogan on it	Variable, get quotes
	Calendar with a list of your monthly fun things to do with your nonprofit	Cost of printing, plus 1 piece of paper
	A Bumper sticker	Variable, get quotes
	A T-shirt with your nonprofit's logo & slogan	Variable, get quotes from local shops/Cafepresses
	Mousepad with your nonprofit's logo/cute picture	Variable, get quotes from local shops/Cafepresses
	Helping Your Donor Feel More Connected To Your Cause: Writing an uplifting note: You could	Cost of printing notecard and

	do what Amnesty International does, and give a blank notecard and envelope to send to someone who needs a message of hope, with some ideas for what to write on the inside, for the donor to take part in your cause in a small way.	self-mailing envelope
	List of other ways to get involved with your nonprofit & self mailing envelope	Cost of printing, plus 1 piece of paper and an envelope

Could you reserve special perks for these loyal supporters, such as a sneak peek to your newsletter, first dibs on event tickets, or invitations to an open house?

Do you have any other ideas? Please write your own ideas for your welcome kit below.

Engaging monthly givers after the honeymoon period

Some charities like to make a commitment to their donors plain when they sign up for monthly giving.

For example, the Wellington Zoo says,

“Our guarantee to you:

As a regular supporter, we’ll keep you updated with information on how your donations are making a difference.

- *Regular newsletter ‘Zoo Views’*
- *Copy of our annual report highlights*
- *Regular email updates, including news from our keepers, veterinary team, and other Zoo staff*
- *Invitations to special events at the Zoo, including an annual ‘behind the scenes’ invitation to see how your donation is helping the Zoo”*

What guarantees could YOU make to keep in touch with YOUR monthly donors?

What is the sequence to help people keep excited and engaged with your nonprofit after the honeymoon period?

Keep calling, keep emailing, keep communicating with these donors.

If you only have a few of them, why not segment out the highest dollar value givers and give them a phonecall once every quarter just to check in and tell them how things are going?

Maybe even have a conference call with your monthly donors, so they can chat with program staff and ask them how programs are going on the ground?

Honor them once a year with a special friendraiser just for them.

Remember their birthdays and send them a birthday card.

If they have a work or wedding anniversary, remember this and send them an anniversary card.

Do you have any other ideas for engaging your monthly donors long term?

If not, why not give a monthly gift to several more successful nonprofits in town to see how they thank you, and what they do to make you feel special?

Creating branded communications for monthly givers

What is the main reason people are giving monthly?
So you can do MORE good works.

Your branded communications can emphasize this.

Here are some examples of branding for monthly givers from around the world.



The Wellington Zoo in New Zealand makes a beautiful statement with their monthly giving logo. It looks like a professionally designed logo, but it emphasizes the MONTHLY aspect of giving. As in, the donor is giving of their heart every month. There's even a little heart on the calendar! Beautiful. IF you're looking for inspiration for your monthly donor branding, you could do worse than the literalism of the Wellington Zoo's logo.



Through Sustainers Harvest, our monthly giving program, a donation will automatically be charged to your credit card each month. You choose the amount you wish to donate and you may withdraw from the program at any time.

Please be sure to select the Recurring Gift option below.

Here's an example of a monthly giving logo for the Rhode Island Food Bank's monthly giving program.

It explains at the top of the page the usual concerns of monthly givers, and it looks polished and professional. That's the sort of image you would want for your monthly giving program as well. I am sure this logo goes out on all of their monthly donor communications, and they may have some letterhead with this logo as well.



I love this branding from the New York Public Library. I love the logo, and the tagline. What is their monthly giving tagline? Keep Libraries Strong! It's to the point! And it's a 1 inch button as well, and they highlight this on their website, so you know you can show your support visibly when you become a monthly donor to the library.

Featured Club:

Angels Of The Poor

Provide innocent little ones with food, medicine, shelter, clean water, loving care and hope for a better future.

CLICK HERE TO JOIN

Cheryl Ladd





Haiti Giving Club

You can continue to be a part of Haiti's rebuilding process by joining this special monthly giving club.

Join Today



Housing Giving Club

Build sturdy, safe housing for poor families living in hovels, tents or other substandard conditions.

Join Today



First Friday Fast

By fasting one day each month, you can sustain the lives of those who have nowhere else to turn.

Join Today

Benefits of Monthly Giving

- Efficient: Provides a consistent source of support for the poorest of the poor
- Convenient: Your monthly donation processes automatically on your credit or debit card
- Flexible: You can change the amount of your gift any time



Feeding Giving Club

Provide lifesaving food for hungry families and children who desperately need your help.

Join Today



Angels Of Hope

Please help an orphaned child grow and develop mentally, physically and spiritually in a Christian environment.

Join Today

I really like this one from FoodForThePoor.org because it puts into context different ways to give monthly, and it ties it to people's faith. Faith-based donors are some of the most loyal and generous donors you can find, and if that fits with your mission, take the Angels of the Poor example and see if you can apply it to your nonprofit. To see this whole page, go to: <http://www.foodforthe poor.org/help/monthlygift.html>

Fantastic Monthly Giving E-Course
Week 3: Welcoming New Monthly Givers Page 19



Here's an example of a monthly giving program called Hearts for the City from Union Gospel Mission in Vancouver BC.

I love how the blue of the logo is echoed in the background of the picture. Again, the logo looks professionally designed. They have a name and logo for their program, but they don't have a tagline, which would make this stronger. A picture of a monthly donor and why they give would be stronger here as well.

Here's an example of a brochure for a branded monthly giving society, The Benjamin Franklin Society at Franklin and Marshall College.

To see larger versions of the images below, please see these links:

<http://www.jmarcdesigns.com/img/MonthlyGivingBrochureSide1SMALL.jpg>

<http://www.jmarcdesigns.com/img/MonthlyGivingBrochureSide2SMALL.jpg>

Credit Card Option

I (We) hereby authorize Franklin & Marshall College to initiate monthly charges to my (our) credit card in the amount listed on this form.

Type of Card: ☐ VISA ☐ MasterCard ☐ Discover ☐ AmEx

Card Number: _____

Expiration Date: _____

Electronic Funds Transfer Option

I (We) hereby authorize Franklin & Marshall College to initiate monthly debit entries in the amount listed on this form, from the account at the financial institution named below, and authorize the institution to debit the below named account for the same. **Please attach a voided check or deposit slip to this form.**

Financial Institution: _____

Type of account: ☐ Checking ☐ Savings

9-digit routing number*

*can be found at the bottom of your check, directly before your acct #.

Account number: _____

Signature(s) required to authorize credit card or EFT option

Signature _____

Date _____

Signature _____

Date _____

Please remember:

- Keep a copy of this form for your records.
- All monthly charges will be reflected on your statement. The College will provide you with a receipt annually in January for all gifts during the previous calendar year (January through December) for your tax records.
- Return the signed original to:
College Advancement
Attn: Danielle Vigilante Webb
Franklin & Marshall College
PO Box 3003
Lancaster, PA 17604
or by fax to 717-392-4418
- If you have questions or would like to increase, decrease or terminate your monthly giving, call 717-392-4330 or email giftaccounting@fandm.edu.

The Benjamin Franklin Society

The Benjamin Franklin Society celebrates the College's strongest supporters who invest confidently in Franklin & Marshall. Please consider joining by making a gift at one of the following levels:

Giving Society	Monthly Contribution	Yearly Amount
1787 Council	\$148.92	\$1,787
Dedler Council	\$208.34	\$2,500
Hartman Council	\$416.67	\$5,000
Goethel Council	\$833.34	\$10,000
Diagnothian Council	\$2,083.34	\$25,000
Old Main Council	\$4,166.67	\$50,000

Graduates of the Last Decade (GOLD) can participate at the Member level with the following gifts:

Graduation Year	Monthly Contribution	Yearly Amount
1 Year ago	\$8.34	\$100
2 Years ago	\$16.67	\$200
3 Years ago	\$25.00	\$300
4 Years ago	\$33.34	\$400
5th Reunion	\$41.67	\$500
6 Years ago	\$50.00	\$600
7 Years ago	\$58.34	\$700
8 Years ago	\$66.67	\$800
9 Years ago	\$75.00	\$900
10th Reunion	\$83.34	\$1,000



Monthly Giving Program

Guarantee your support for F&M every year!

What is the Monthly Giving Program?

The Monthly Giving Program provides the opportunity for you to easily make your gift to the Franklin & Marshall Fund in regular monthly installments from your credit card or checking/savings account.


How does it help F&M?

Your monthly contribution provides the College with an ongoing, reliable source of funding. Gifts made through this program reduce administrative costs and allow more of your gift to be used to support Franklin & Marshall's top priority — expanding opportunities for students and faculty.

How does it help you?

Enrolling in the program means you will not have to worry about sending a check and it will also decrease the number of phone and mail reminders you receive from the College. A record of each gift will appear on your bank or credit card statements and you will receive an annual tax receipt from the College in January. By choosing to provide this consistent support, you will be counted among F&M's most loyal and valued donors.

The program may also allow you to increase your yearly contribution to a leadership level as your gift will be divided into manageable monthly increments. Please see the back for information on joining The Benjamin Franklin Society. Monthly amounts may need to be adjusted during the first year if enrollment begins after July to ensure the desired giving level is achieved.



Franklin & Marshall College

Monthly Giving Program Enrollment Form

Your Name(s) _____

Class year (if applicable) _____

Street Address _____

City _____ State _____

Zip Code _____

Daytime Phone _____

Email _____

I/(We) would like to support the College with monthly contributions to the Franklin & Marshall Fund:

\$ _____ Unrestricted (College's strategic priorities)

\$ _____ Financial Aid

\$ _____ Academic Programs

\$ _____ (Specify department if desired)

\$ _____ (Specify department if desired)

\$ _____ (Specify department if desired)

\$ _____ (Specify department if desired)

\$ _____ (Specify department if desired)

\$ _____ (Specify department if desired)

\$ _____ (Specify department if desired)


Total Monthly Contribution (\$5 Minimum)

Total Yearly Contribution will depend on month of first debit.
F&M's fiscal year runs from July 1 - June 30.

Please make charges on or around the ☐ 1st or ☐ 15th of the month, beginning (month/year) ____/____.

I would like the charges to occur until ☐ I provide further notice or ☐ (month/year) ____/____.

Please continue completing form on reverse



What inspiration does this give to you?

Start thinking about a logo for your monthly giving program, if you don't already have one. You might like to create a banner graphic for this program if you can't afford a graphic designer, using <http://myecovercreator.com>.

If you have a little money to throw around, consider getting a student group from your local art school to create a series of logos to make your monthly donor program shine! Offer the money as a prize to the best logo.

Conclusion

What do you think of this third week? What are you getting out of this course so far? Is it hands-on enough? Is there something I could do better? Let me know.

If you need more inspiration for welcome packs,

Here are some more resources to research welcome packages:

Here's the [full Greenpeace Welcome Package sequence](#)

Here's the [World Wildlife Fund Welcome Package Booklet](#)

[Here's the SOFII Hall of Welcome Packages](#)

Your Homework:

1. Use the checklist above to start deciding what you'd like to include in your welcome kit. Start costing out what you'd like to include.
2. Make a survey for your monthly donors. Steal my questions! Send it to me! I want to see that you're not just reading, but that you're actually taking action.

If you have any questions at all, please give me an email at info@wildwomanfundraising.com.

I'm looking forward to hearing from you!

A handwritten signature in black ink that reads "Mazarine Frey". The script is fluid and cursive, with the first name "Mazarine" being more prominent than the last name "Frey".

Mazarine