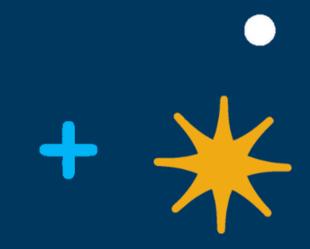




## **Operation Conference**



# Spark A *Recurring-First* Mentality With Your Supporters



# What's a Mastermind?

It's simply a group of peers coming together to mentor one another, solve problems together, answer each other's questions, and get advice and inspo from the other members pursuing a collective goal.







# I've helped launch 15 monthly donor programs through the Monthly **Giving Mastermind**

- 2.The Bench
- 3. The Essentials
- 4. Joyraisers
- 5. The Promise
- 6.The Party
- 7.The Table
- 8. The Pink Society
- 9.The Path
- 10.The Beacon
- 11. The Beat
- 12.The Trellis
- 13.The Village
- 14.Builders Guild
- 15.RISE



1.The Roots

# I interviewed 15 causes 26 - 66,000 monthly donors

- 1. charity: water
- 2. Dressember
- **3. Because International**
- 4. Feeding Westchester
- 5. Miry's List
- 6. The Adventure Project
- 7. Brown Bagging for Calgary's Kids
- 8. The Water Project
- 9. Daily Giving
- **10.Tim Tebow Foundation**
- 11. IJM UK
- 12. Queer Women of Color Media Arts Project
- 13. The Hope Booth
- 14.Chamber of Mothers
- 15. Roots Ethiopia







# EVERY size program MATTERS



# If we could go back in time, we would have



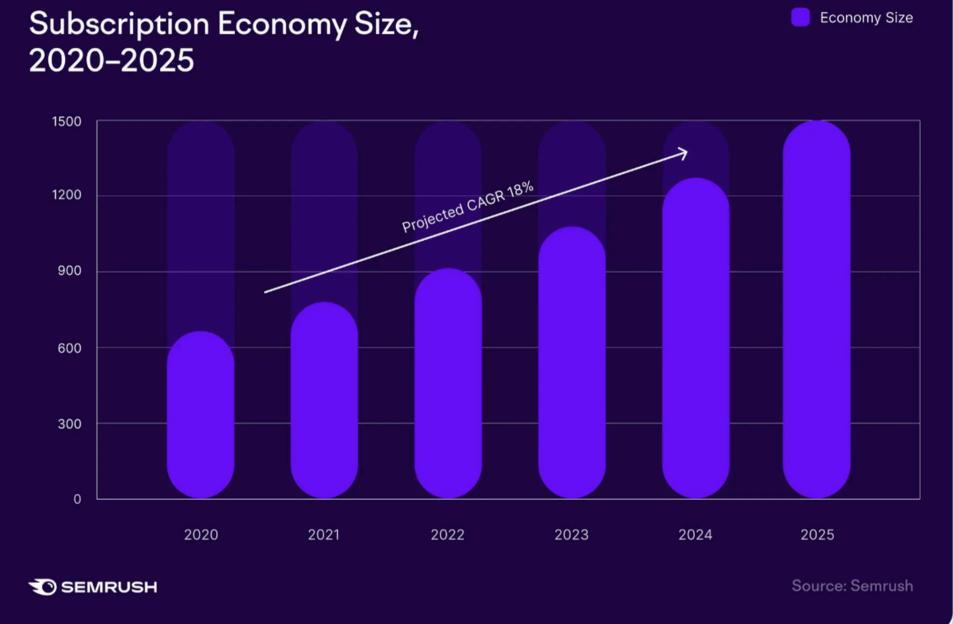
# Started sooner.



## Trend #3: Consumer Focus on Authenticity, Social Good, and **Ongoing Relationships Is** Increasing

Today's consumers aren't like the consumers of the past. In the 2024 Digital Horizons report, we look at behavior trends among consumers and how businesses are adapting to meet their desires. Here are a couple of key takeaways:

- Consumers choose brands that align with their values and interest in social responsibility and sustainability is growing
- Certain business models like direct-to-consumer and subscription models enable authentic, ongoing engagement modern consumers desire



# Today...aka right now:)



5-Step Framework to Building a Successful Monthly Giving Product



✓ How To Self-Audit Your Existing Product



Unconventional Growth + Joy & Gratitude Strategies



## **MY MISSION:**

to teach nonprofits how to attract potential supporters to their cause using social ads and create sustainable giving models by building monthly giving programs for everyone to become a philanthropist.





# Hi! I'm Dana

- Speaker
- Host of the podcast, Missions to Movements Monthly Giving Summit (coming Sept!!)
- Creator of the Monthly Giving Mastermind + • Wife, mama, & dog mom in Atlanta • UCF Alumni, GO KNIGHTS!





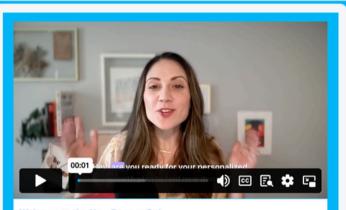


# Your Personalized Growth Plan to Find New Donors

### Ask DonorPerfect

. 191

Hey there! I'm Dana Snyder, a digital strategist who specializes in helping nonprofits attract passionate supporters! Excited to get you set up with your own customized growth plan. But hey, before we dive in, mind if I ask you 5 quick questions? You Ready?



Welcome to the New Donors Quiz Answer 5 quick questions to get your personalized donor growth plan now! Fundraising Software for NonProfit Donor Management by DonorPerfect

Click here to get your first quiz question!

Choose an option above..

.





## **STEP 1: CREATING THE PRODUCT** THE WHY + STRUCTURE + NAMING PROCESS

THE WHY:

- What's the reason for your product to exist?
- What's the impact it's intended to have?



# OUR VISION WORLD WHERE AL PEOPLE ARE

## **STEP 1: CREATING THE PRODUCT** THE WHY + STRUCTURE + NAMING PROCESS

## THE WHY:

- What's the reason for your product to exist?
- What's the impact it's intended to have?

## THE STRUCTURE:

• What structure aligns with the mission and values of your organization?



\$1 A DAY

\$31/mo or \$365/yr

\$4 A DAY

\$124/mo or \$1,460/yr



\$217/mo or \$2,555/yr



\$3 A DAY

\$93/mo or \$1,095/yr

# \$5 A DAY

\$155/mo or \$1,825/yr

\$6 A DAY

\$186/mo or \$2,190/yr

# **\$8 A DAY**

\$248/mo or \$2,920/yr

**\$9 A DAY** 

\$279/mo or \$3,285/yr

"Hope Booth is built for the community, by the community, and helping them realize that they're part of building this. Like without them, it doesn't exist, it doesn't exist, genuinely, literally doesn't exist.

And so I think just engaging people on that level is going to be really fun as we get more intentional with it."

– Gloria Umanah, The Hope Booth



# **STEP 1: CREATING THE PRODUCT**

THE WHY + STRUCTURE + NAMING PROCESS

## THE WHY:

- What's the reason for your product to exist?
- What's the impact it's intended to have?

## THE STRUCTURE:

• What structure aligns with the mission and values of your organization?

## NAMING PROCESS:

- Transactional vs community-led
- Crave belonging
- Bigger than ourselves



## The Mothers Will Save

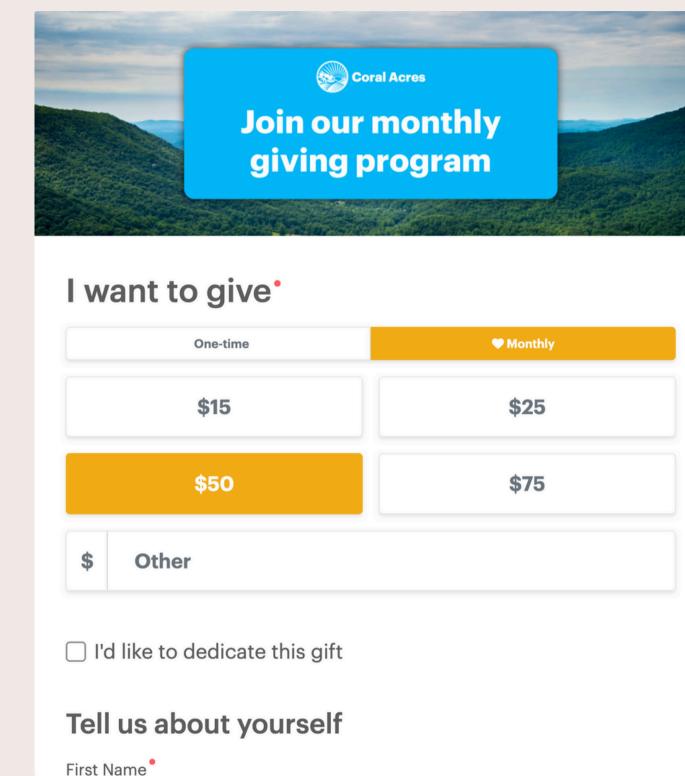


# **STEP 2: MAKE IT EASY**

**WEBSITE + DONATION EXPERIENCE** 

## WEBSITE

- Every product has a landing page, does yours?
  - Avoid donor confusion
- Format is important
  - Mobile-friendly
  - BIG audacious statement
  - Donation button or form







# **STEP 2: MAKE IT EASY**

WEBSITE + DONATION EXPERIENCE

## WEBSITE

- Every product has a landing page, does yours?
  - Avoid donor confusion
- Format is important
  - Mobile-friendly
  - BIG audacious statement
  - Donation button or form
    - DONATION EXPERIENCE
- Monthly ONLY or pre-selected
- Multiple payment options
- NO long forms mobile-friendly



I want to giv	'e'			
	Monthly			
<b>\$15</b> buys 2 meals every mont	th			
<b>\$25</b> buys 5 meals every mont	th			
<b>\$50</b> buys 15 meals every mo	Select your payment method			
	O Credit Card			
	O PayPal	PayPal		
	O Venmo	venmo		

"So first and foremost, you have to have the technical capacity to allow them a userfriendly experience.

For example, we wanted to make sure we had a clear login process on our website, because if you can't intuitively see how to pause or cancel your account, then there might be a lack of trust."

- Arieh Friedner, Daily Giving



As a Freedom Partner, you're helping IJM work with authorities to bring children like Rajeshwari to safety and support survivors as they heal.

You're also helping enable systemic change.

Thanks to the support of Freedom Partners, a recent independent study shows that we've helped authorities achieve a relative reduction of 81.9% in human trafficking for labour in Tamil Nadu, where Rajeshwari is from, between 2014 and 2021.

That means millions of children like Rajeshwari will never have to experience trafficking or exploitation. This is the lasting change that's possible together.

**Clear value proposition, NLP** Showcase the NEED + THE IMPACT A COLLECTIVE effort







HOME

ABOUT

**EVENTS & FUNDRIAISNG** 



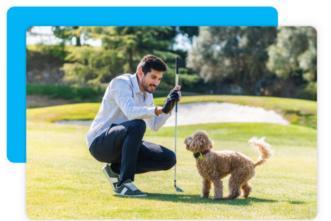
DONATE

## **Ties and Tails Gala**

The Ties and Tales Gala is a fictitious Black Tie event that a nonprofit might hold to raise money for their mission. This sample registration form offers a simple way for any nonprofit to sell tickets, register attendees and obtain sponsors. For the Ties and Tales Gala, we used the Generic Registration with Sponsorship template that is integrated with DonorPerfect's Events Management module. This makes the process of registering attendees, managing responses and coordinating other event details easy. (Please visit DP Community for more information on how these components work together.)



Sign Up Now



## **Putts for Pets**<sup>\*</sup>

The Putts for Pets event is a fictitious charity golf event. Golf events offer enormous potential for raising funds and are a unique opportunity to connect with donors in person. This sample registration form allows you to register golf event participants/teams and obtain sponsors. For the Putts and Pets Charity Golf Event, we used the Golf Event template that comes with our regular event registration templates. Since this form doesn't use DPO's Event Management function, registration details, like golfer names and shirt sizes, are stored in the Gift record.



# $\bigcirc$



**Clear value proposition, NLP** Showcase the NEED + THE IMPACT A COLLECTIVE effort



## **Neuro-Linguistic Programming or NLP:**

is a framework that accounts for how people subconsciously produce real-life outcomes through thoughts, language, and feelings. NLP sales involve using specific phrases, strategies, and behaviors to play on that system and subtly shape how prospects feel about an offering.

## POSITIVITY - URGENCY - TRUST



### Tim Tebow Foundation

Sponsored Library ID: 1349736919052428 ....

When you become a member of The Movement community, you become the backbone of the mission, and provide fuel for sustainable life-change through Faith, Hope and Love.

Will you join the community of 6,000+ members of The Movement and help provide the fuel needed so that we may run urgently towards the Most Vulnerable People in crisis and chaos?...





COMMUNITY.TIMTEBOWFOUNDATION.ORG NOT AFFILIATED WITH META Join The Movement: Add impact to you life

Donate now

## Dana.

You've seen the headlines.

With rising temperatures, extreme weather events, and threats to biodiversity, the time to RISE is now.

You believe in what we do - to create a safe, just and healthy environment for all.

And it's possible, with your help.

Imagine what \$1 a day could do:

- · Mobilize climate voters in Florida. In 2023 alone, we reached more than 18,000 Floridians and hosted 40+ advocacy events. We'll continue to educate, unite, and engage concerned citizens.
- Scale the youth movement. Younger generations will be most impacted by the climate crisis, genCLEO programming educates and empowers youth to become advocates for the environment.
- · Help urge corporations and decision-makers to act. Electing the right candidate matters. We'll fight for concerned citizens to have a say in policies and help bring vital federal funding to Florida.

## RISE WITH CLEO

Celebrate Earth Week by joining our RISE community - a passionate group committed to creating a safer, greener future for all - every single day!

Join us in the f With gratitude, **Missions to Movements** 

Ep. # 37: How To Maintain a 98% Monthly **Donor Retention Rate with Chive** Charities' Erika Carley



# **MARKETING + PR**





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# **STEP 4: MAKE THE ASK**

- Email marketing, front & center
- SMS, Paid ads
  - corporate partnerships

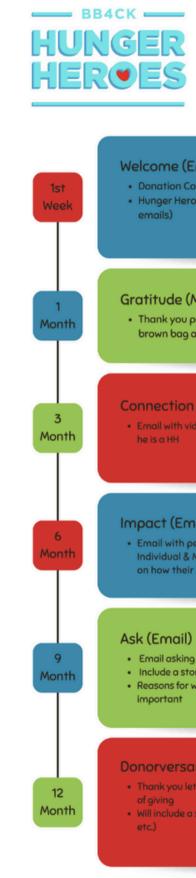
"We just show up for this. The donors do it. And then they invite folks and we invite people in our donors list as well. It is literally a donor thing that they organize."

- Kebo Drew, Queer Women of Color Media Arts Project



## **STEP 5: CONSTANT JOY & GRATITUDE RETENTION PLAN**

- A strategic plan to inspire JOY every time the monthly transaction hits their account
- Surprise & delight moments
- Authentically aligns with your organization • Ex. Chamber of Mothers
- Responsive experience + automate where you can
  - LettrLabs
  - Emails
  - Snail mail



Throughout the Year



## Welcome (Email)

- Donation Confirmation Email
- Hunger Hero Automation Journey (3

## Gratitude (Mail)

· Thank you post card with coloured brown bag and personal note

### Connection (Email)

• Email with video of Kyle talking about why

## Impact (Email)

 Email with personalized video from Individual & Monthly Giving Coordinator on how their impact made a difference

- Email asking for an upgrade (soft ask)
- Include a story
- · Reasons for why sustainable giving is

### Donorversarry (Mail)

- Thank you letter celebrating their one year
- Will include a small gift (keychain, magnet,



4 Newsletters The Slice every month Holiday something Cumulative Tax Receipt in January Annual Report Board Thank You Cal Monthly Behind the Scenes Personal Video



# A PLAN FOR 12-MONTHS OF JOY + GRATITUDE



# Scan this QR code



Does the current structure of your program align with the intent of your mission?



Does the current structure of your program align with the intent of your mission?





- Does the current structure of your program align with the intent of your mission?
- Do you have a "product name"?
- Do you have a product landing page with ALL important information above the fold?



Does the current structure of your program align with the intent of your mission?





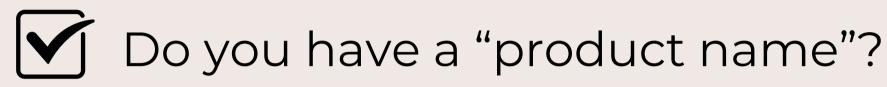
Do you have a product landing page with ALL important information above the fold?



Does your copy call IN the believers?



Does the current structure of your program align with the intent of your mission?





Do you have a product landing page with ALL important information above the fold?



Does your copy call IN the believers?



Is it EASY and clear on how to give?



Does the current structure of your program align with the intent of your mission?





Do you have a product landing page with ALL important information above the fold?



Does your copy call IN the believers?



- Is it EASY and clear on how to give?
- Do you have a strategy on making the ASK + providing constant Joy & Gratitude?

# SPARK....a recurring-first gift by asking

It's really nice to have this 'set it and forget it' functionality as far as monthly donations are concerned. Many of our sponsors and other donors readily go for this convenient and secure option– obviously!"

Susan Lam, Living Hope International



You're invited to join the Monthly Giving Mastermind :)



September 5-6

# from Salesforce

### 23 6 - Canvas The Sustain... $\times \equiv \mathcal{O} = \#$ introductions $\times$ • like the B.C. government's 'predator manage Monday, May 13th ~ 1. 250 wolves killed from the air annually under 幻 Upgrade Plan the guise of saving endangered caribou, but what is actually a screen for continued destruction of critical habitat by 5 heavily subsidized resource extraction companies), ban on grizzly bear trophy hunting, exposure of bycatch in the DMs Threads mid-trawl industrial fishery offshore, and protection of forage fish populations critical to the food chain, and keeping 0 wild salmon in our waters Drafts & sent We have just over 430 monthly givers and I've run a couple low-entry monthly donor acquisition campaigns ('Give a Activity Fiver for Forage Fish' and our 'May Monthly Match' where monthly donations will be doubled for a full year by Channels another donor) to add about 26 since February. ... # genera However, we are a highly visible organization, with an IMAX production running in theatres around the world, other # growth films, and over 200k followers on social and a highly engaged 17k mailing list (I just did a big clean). Our donor # introduction retention is at 53%. I'd like us to have 700 monthly donors and a 75% retention rate. # justforfun Our program is the Wild Giving League but it hasn't got a lot of traction. # livechats Our biggest challenge is explaining impact, since our campaigns can last 10 years or longer (wolf cull, grizzly trophy # retention hunt) and most of the revenue is needed for people working at desks doing research, writing, creating videos, doing # techforrecurring mapping projects etc. + Add channels (i) 3) Ct Maylette Garces 4:18 PM Direct messages Aloha. I'm with the Kauai North Shore Community Foundation. I came on board just this January as the only staff Meghan Walsh member. We're a teeny organization and looking to accelerate growth this year. Remily Teixeira (A) C<sup>+</sup> Samantha Brigham **Joy** 5:03 PM Pana Snyder you ioined #introductions + Add coworkers Hi Joy here with Birth Detroit. Mission is to midwife safe, guality, loving care through pregnancy, birth and beyond. Apps New org so currently annual program is just getting started maybe 30 recurring donors. Here to engage and get more ideas to craft quality giving program + Add apps i ≥ (♥1) € Meghan Walsh 5:34 PM So many new folks today -- YAY! I can 'feel' all the great sharing we can do together! 🎽 2 😅 $\mathsf{B} \quad I \quad \textcircled{S} \quad \mathscr{O} \quad \overset{\scriptscriptstyle \mathrm{he}}{\coloneqq} \quad \coloneqq \quad \ket{=} \quad \triangleleft \quad \triangleleft$ + Message #introductions 19 + <u>Aa</u> 🙂 @ 🕞 🖞 💋 >

# THE SUSTAINERS: A Slack community for nonprofits with monthly giving programs

## 1st month is FREE, \$5/month



