



# Building 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

- 1.The Roots
- 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

# I interviewed 15 causes

26 - 66,000 monthly donors

- 1.charity: water
- 2.Dressemer
- 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





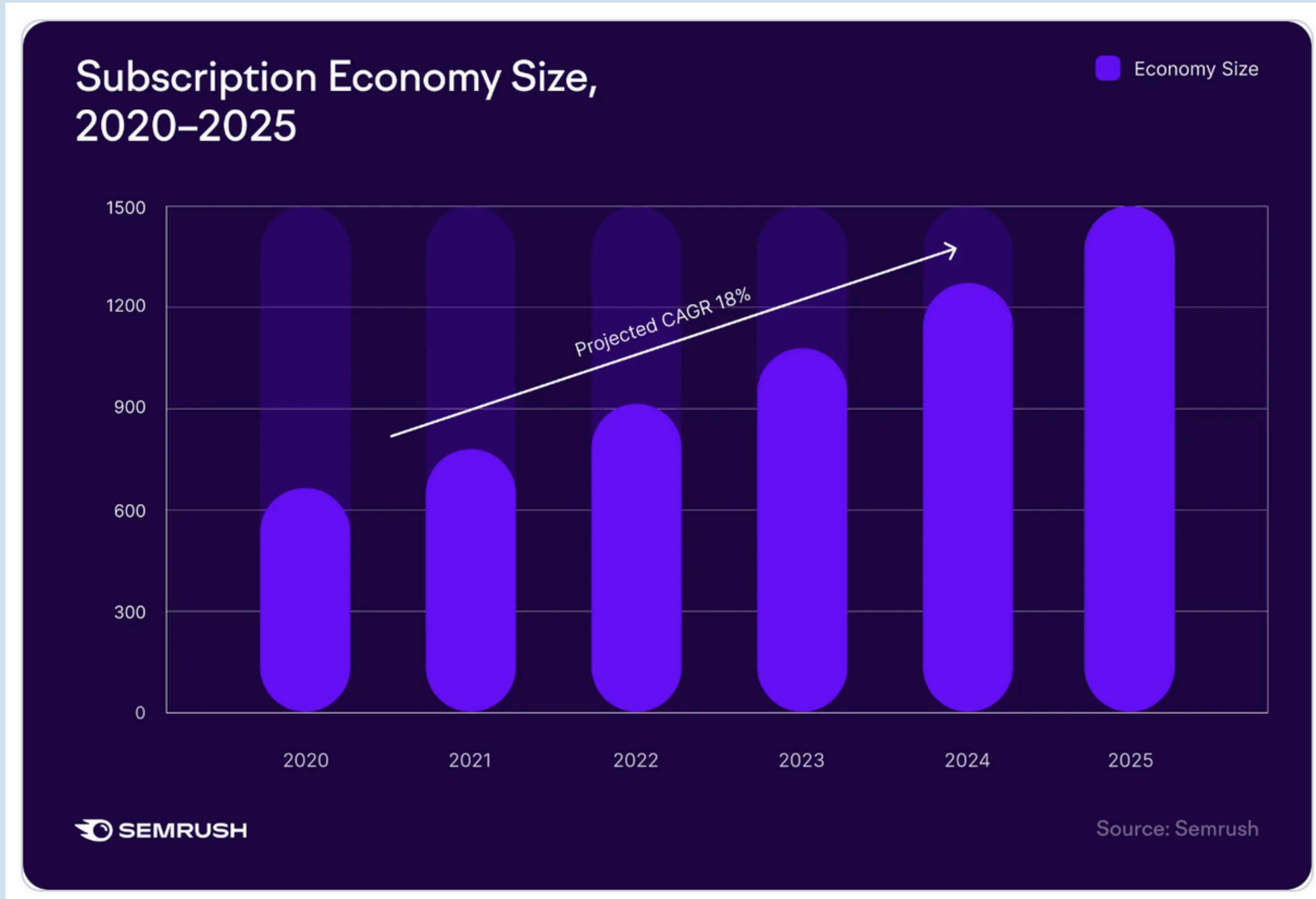
Started sooner.



## 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
- Creator of the Monthly Giving Mastermind + Monthly Giving Summit (coming Sept!!)
- Wife, mama, & dog mom in Atlanta
- UCF Alumni, GO KNIGHTS!

# 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?



# STEP 1: CREATING THE PRODUCT

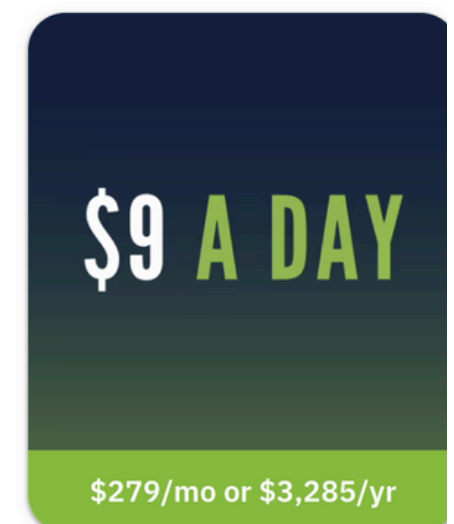
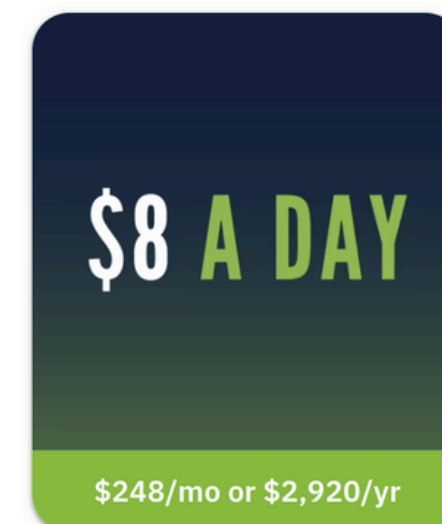
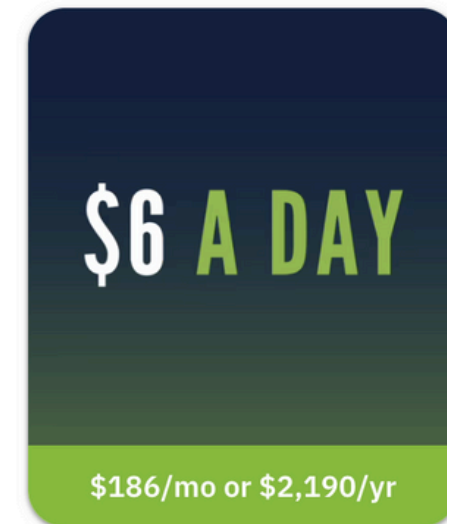
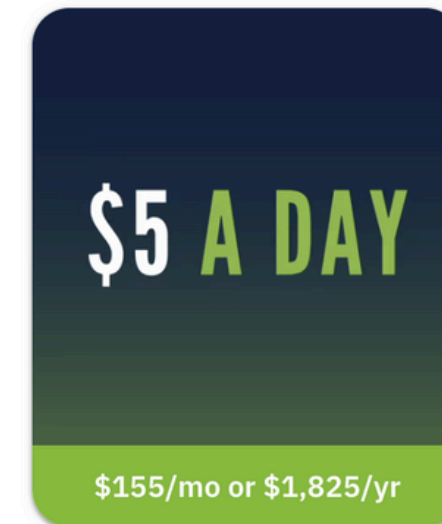
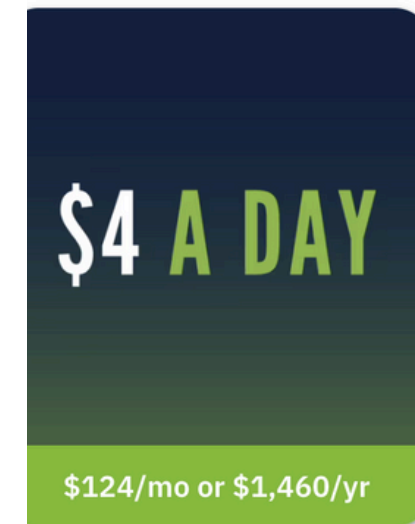
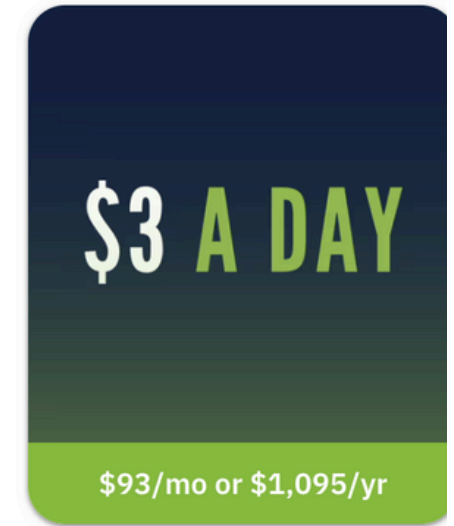
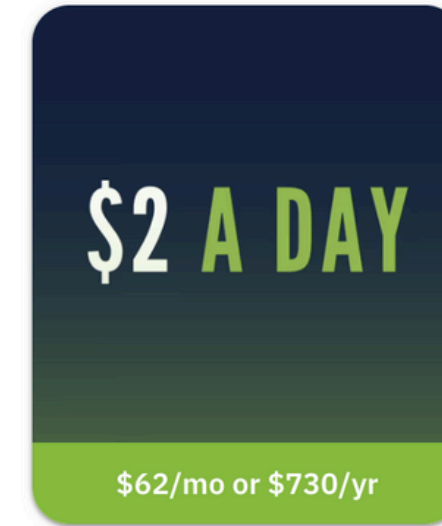
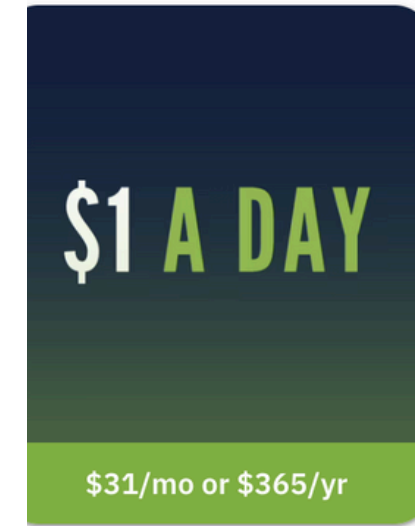
## THE WHY + STRUCTURE + NAMING PROCESS

### 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?





**"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**



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### NAMING PROCESS:

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







# 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

FRONT PORCH COHOUSING  
INCLUSIVE COMMUNITY

Home About ▾ Why Cohousing? Life on the Porch ▾ Support Us ▾ Blog [\\$ Donate](#)

## Help give 20 IDD families a permanent and safe place to call home

Become a founding member of the Builders Guild and help us build a neuro-inclusive cohousing community so IDD individuals can have independence – and their families can have peace of mind.

Become a Founding Member of The Builders Guild


\$300	\$200	\$100
<b>\$50</b>	\$25	\$15

\$ **50** USD ▾

Dedicate this donation

[Add comment](#)

[Let's Build!](#)



Labels in the rendering: Minimal parking on edge of site, Bike store, Common house (Community kitchen & laundry, Meeting space & workshop), Growing space, Renewable energy solutions, Communal outdoor space, Gathering places, Car club, Typically 15-30 houses and flats.

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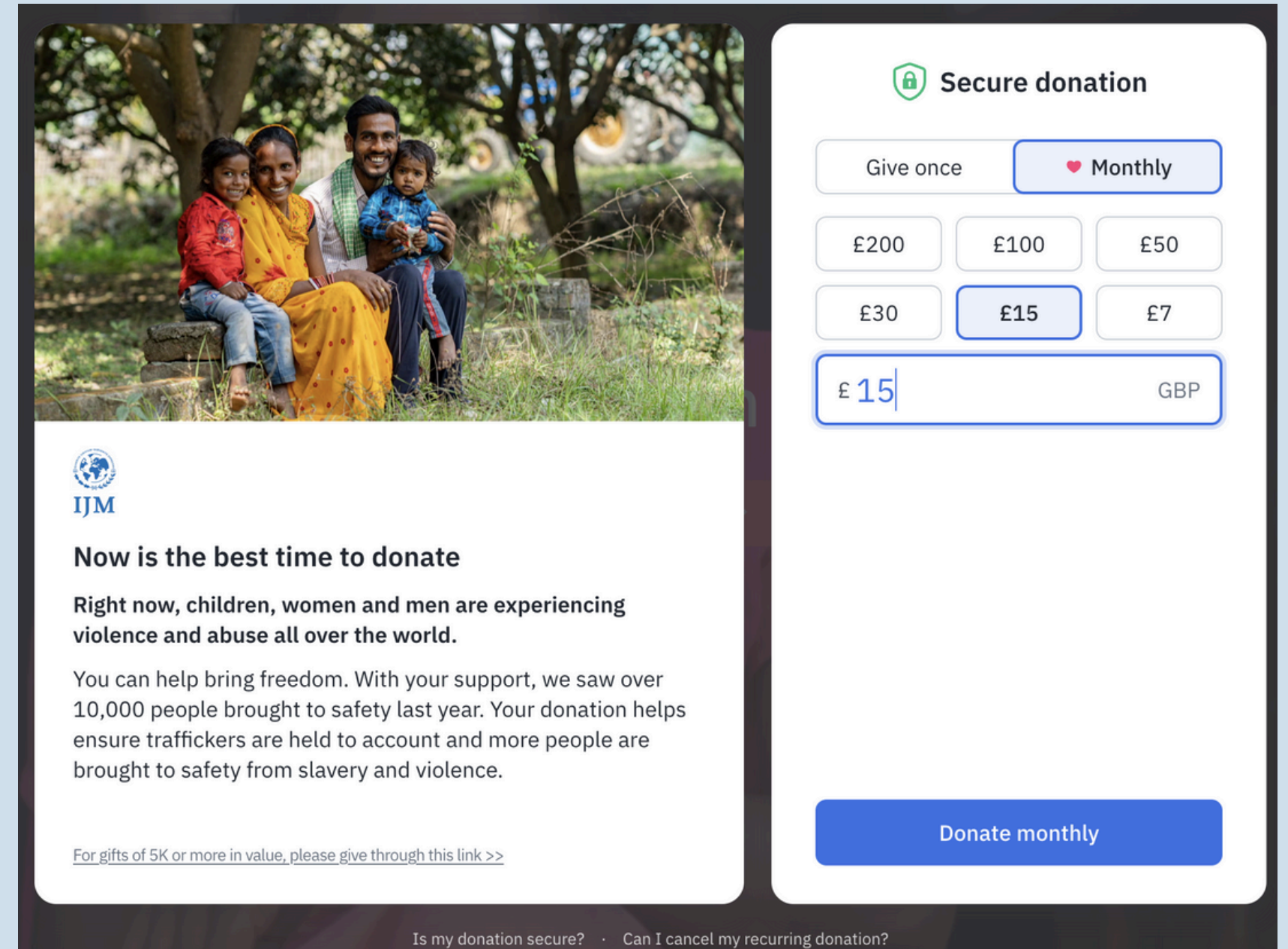
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### DONATION EXPERIENCE

- Monthly ONLY or pre-selected
- Multiple payment options
- NO long forms - mobile-friendly



**Secure donation**

Give once  Monthly

£200 £100 £50

£30  £15 £7

£ 15 GBP

**Now is the best time to donate**

Right now, children, women and men are experiencing violence and abuse all over the world.

You can help bring freedom. With your support, we saw over 10,000 people brought to safety last year. Your donation helps ensure traffickers are held to account and more people are brought to safety from slavery and violence.

[For gifts of 5K or more in value, please give through this link >>](#)

Donate monthly

Is my donation secure? · Can I cancel my recurring donation?



**“So first and foremost, you have to have the technical capacity to allow them a user-friendly 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.”**

**– Arie 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.**

## **Step 3: CALL IN THE BELIEVERS**

**COPY + MARKETING ASSETS / VIDEO**

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





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



EQUATION

# STEP 4: MAKE THE ASK

## MARKETING + PR



Email marketing, front & center



SMS, Paid ads

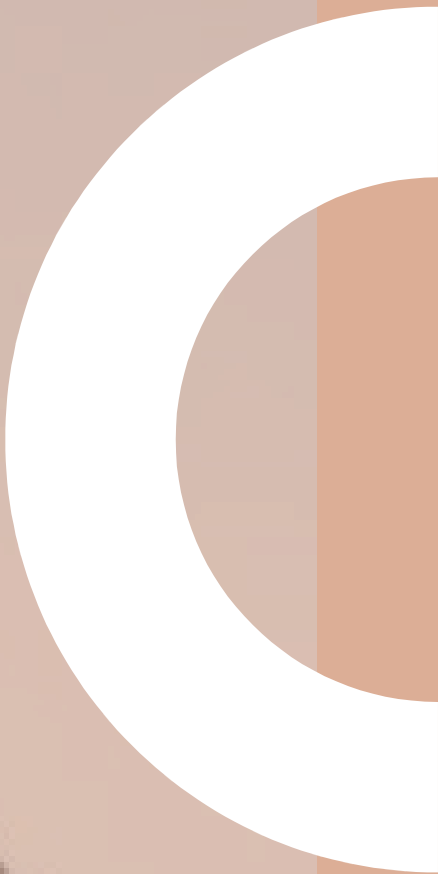


PR, corporate partnerships



**“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**

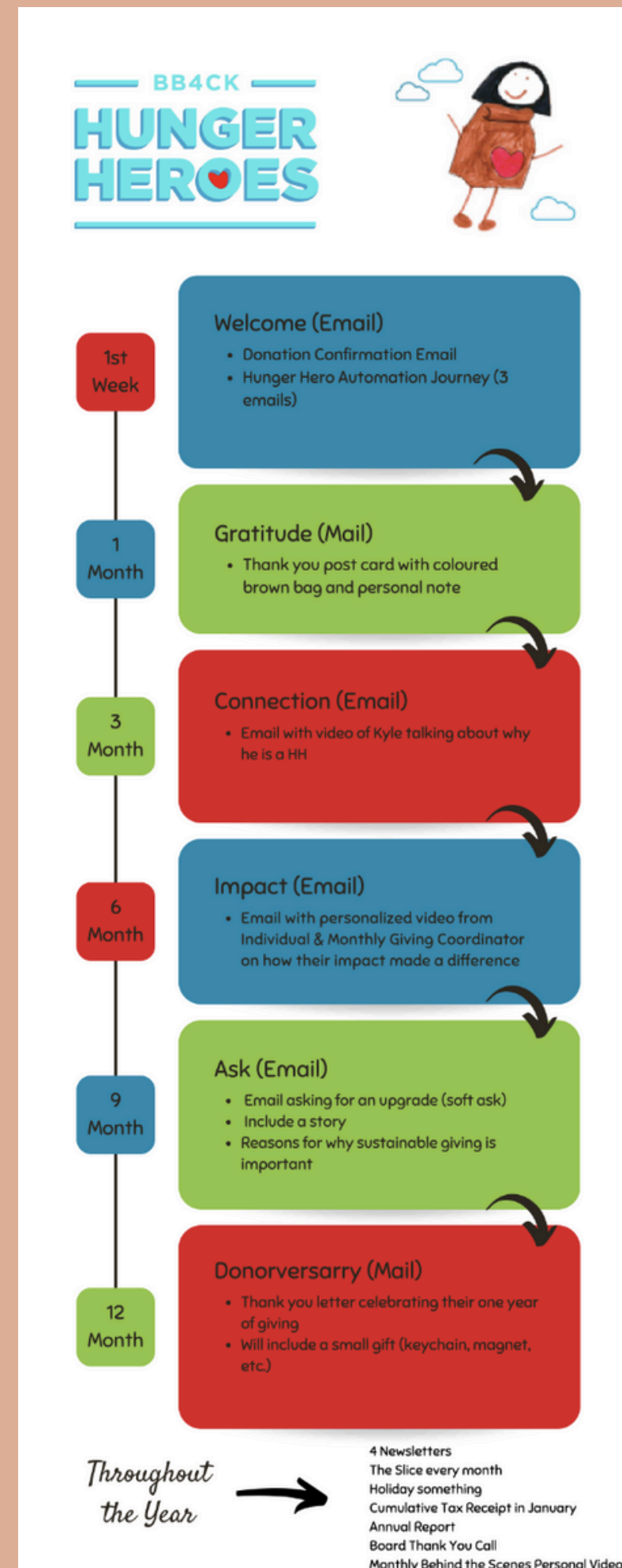




# STEP 5: CONSTANT JOY & GRATITUDE

## 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





# A PLAN FOR 12-MONTHS OF JOY + GRATITUDE

**Scan this QR code**



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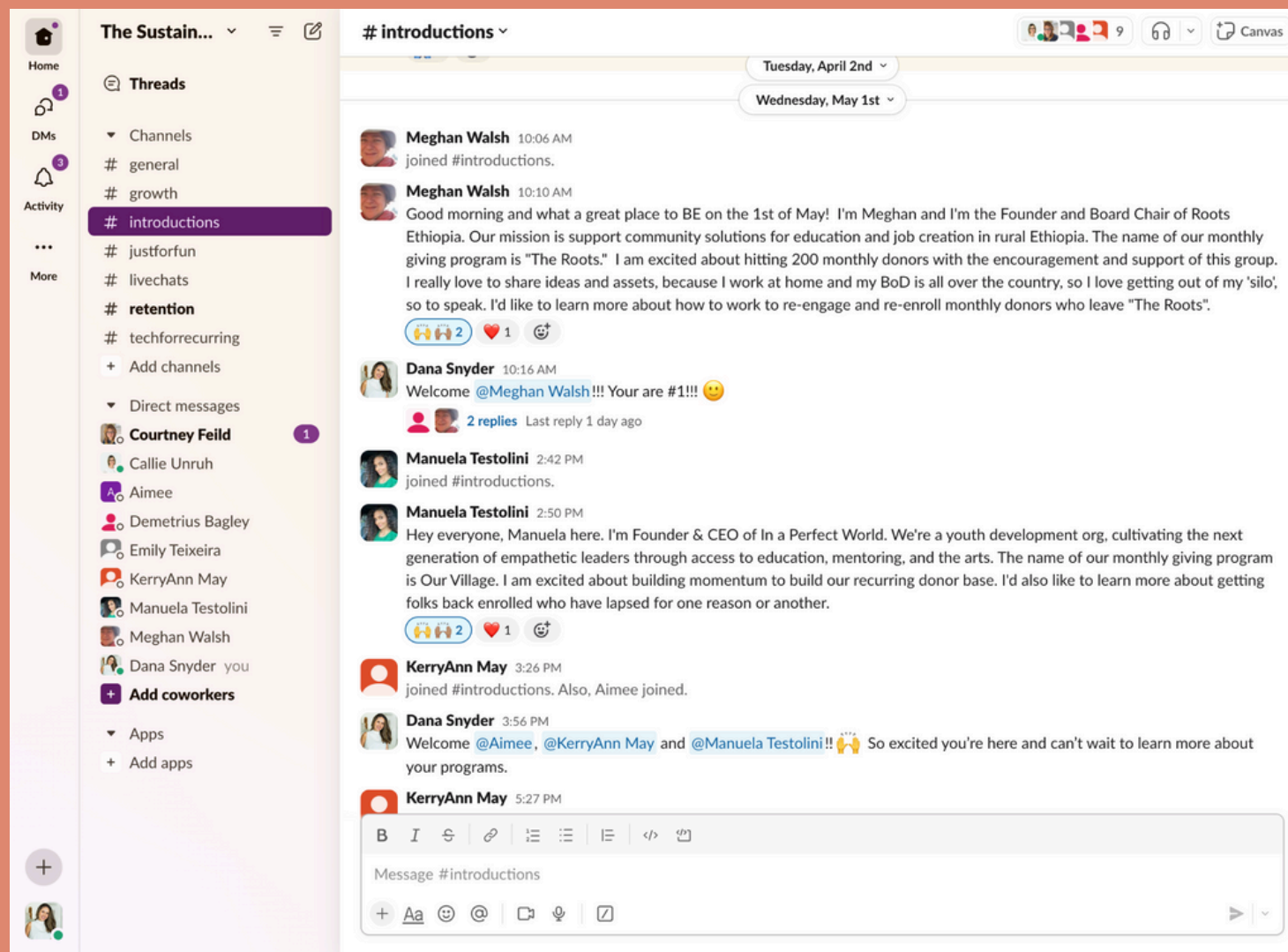
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- Is it EASY and clear on how to give?
- Do you have a strategy on making the ASK + providing constant Joy & Gratitude?



Join the Monthly Giving Mastermind :)



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

1st month is FREE, \$5/month



MONTHLY  
GIVING  
*Summit*



September 5-6