

Building a Monthly Giving Program - Checklist

STAGE 1: SET-UP



1. What is already happening?

- Who is already giving monthly?
- How many people?
- How much money does this represent? What percent of the overall budget does that represent?
- Why do they give (ask them)?

CENTRAL IDEA: *You probably already have some monthly givers, and talking to them about why could inform your program.*

NOTES:

2. What will we use monthly giving funds for?

- What would it take to maintain what you're already doing?
- What is easily understood by the broadest audience (i.e. maintaining wells)?

CENTRAL IDEA: *The best monthly giving programs help underwrite what's already happening.*

NOTES:

3. How will we talk about monthly giving?

- What's the story monthly givers can tell about the work they are doing? What are you adding to their own story?
- Can we incorporate the impact of monthly giving in our overall story (i.e. we don't just build wells, we make sure the water keeps flowing)?

CENTRAL IDEA: *Focus messaging about monthly giving on the story givers can tell about the work THEY are doing.*

NOTES:

4. What will we call the monthly giving program?



- Is there inspiration in the language of the industry or people you serve (like Habitat for Humanity has “Hope Builders” and CharityWater uses “The Spring”)?
- Do the typical words of partner, circle, builders, etc. have any additional meaning in your context?

CENTRAL IDEA: *Your monthly giving program should have a name, and it is best if the name is connected to the work.*

NOTES:

5. How do we handle this logistically?



- Is monthly giving feasible with your current credit card processor?
- What are other organizations using effectively (ask them if they like it)?

CENTRAL IDEA: *It needs to be easy to sign up, update credit cards, etc. Start well, because it is hard to switch.*

NOTES:

STAGE 2: LAUNCH



6. What do we do with the people already giving monthly?



- Can we celebrate them as founding members?

CENTRAL IDEA: *Current monthly givers can be founding members of your new program!*

NOTES:

7. How do we find and invite new monthly givers?



- What will be our primary invitation mechanism? Personal? Email? Etc.
- How do we highlight monthly giving on the website (not just an option on the giving form!)?
- Can we invite at events? Is there a natural upcoming event to launch?
- Who should we personally invite in person or via phone or email (insiders, people giving multiple times a year, core volunteers, board members, etc.)?
- How about a special mailing/e-solicitation?

CENTRAL IDEA: *The most likely monthly givers are people who already know you, who already give, and volunteer.*

NOTES:

8. What about major givers?



- Is there someone who would like issuing a matching gift to help spur monthly giving (like \$250 per new monthly giver, regardless of size, up to \$10,000)?
- Could this be an answer to sustainability question major givers ask (“This new project will be sustained by a core group of monthly givers”)?

CENTRAL IDEA: *Whether or not they give monthly, a vibrant monthly giving program strengthens a major gift ask.*

NOTES:

STAGE 3: CARE AND MAINTENANCE



9. How will we acknowledge and thank monthly givers?



- How will we personally acknowledge and thank a new monthly giver (call, personal note)?
- What about thank you videos from the field?

CENTRAL IDEA: *A new monthly giver is someone who is saying “I am with you.” That’s big. Acknowledge that!*

NOTES:

10. How will we keep communicating with monthly givers about their shared impact?

- What tools might they need to share their story in the cause?
- What about a private Facebook page for monthly givers?

CENTRAL IDEA: *Monthly givers are great cause evangelists. Equip them by giving them information and tools to share their story.*

NOTES: