



Everything You Need to Know about **make it monthly**



SPEAKER:



Philip Manzano
Senior Client Marketing Manager



Land Acknowledgement

Our team at CanadaHelps is grateful to have the opportunity to meet and work on many Indigenous homelands across this land we share, Canada.

As settlers on these lands, it is important to acknowledge that our Vancouver offices are located on the unceded territory of the Coast Salish People, the Montreal offices are located on Kanien'kehà:ka (Mohawk) territory, and the land on which we operate in Toronto is the traditional territory of the Wendat, the Anishinaabeg, Haudenosaunee, and the Mississaugas of the Credit First Nation.

We want to express our respect for the territories we reside in and honour the diverse Indigenous People who have lived and worked on this land historically and presently. We, the staff and leadership at CanadaHelps, are committed to being active participants in reconciliation. We are committed to continuing to amplify Indigenous voices, and learning how our work affects Indigenous People.

About CanadaHelps



- CanadaHelps is a charitable foundation increasing giving in Canada through technology.
- **For Canadians**, CanadaHelps.org, provides a trusted one stop destination for making donations, fundraising, or learning about any charity in Canada.
- **For Canada's 86,000 charities**, we also develop affordable fundraising technology and provide free training and education for charities so that all charities have the capacity to increase their impact and succeed in the digital age.
- Since 2000, more than 3.5 million Canadians have donated over \$2.3 billion to charities using CanadaHelps.



Got A Question?

- A recording will be emailed to you following the webinar. You'll be able to watch the recorded video on demand.
- You can hear us, but we can't you.
- Have questions or technical difficulties?
- Type them into the Questions Log at anytime.

Questions

[Enter a question for staff]

Send

About the Presenter



Philip Manzano

Senior Manager, Client Marketing

philipm@canadahelps.org

Philip Manzano is a Senior Client Marketing Manager at CanadaHelps, a leader in providing powerful fundraising and donation technology to charities and donors since 2000. Philip has been working closely with charities and small nonprofit teams to adopt nonprofit technology for the last nine years.

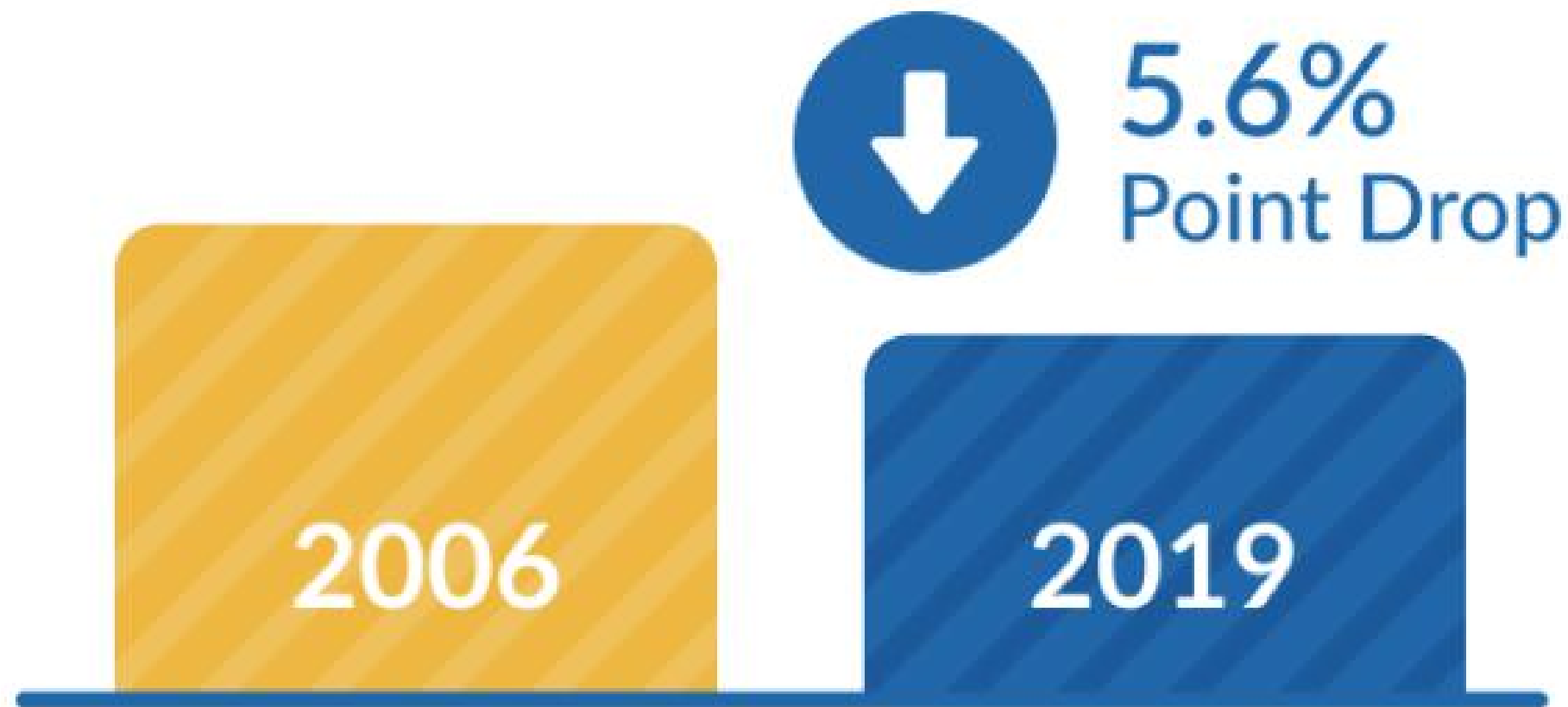


Agenda

- The Importance of Monthly Giving
- Tips to improve Monthly Giving
- New! Prompt for Monthly
- Overview of Make it Monthly + Resources

The Importance of Monthly Giving

Building donor relationships is more important than ever.



Overall giving participation rates have **declined** from 24.6% in 2006 to 19% in 2019.

The Importance of Monthly Giving

The **average retention rate is only 43%**, which means...

For every **100 people who donate**
to your organization
57 of them won't return.

The Importance of Monthly Giving

Monthly donors give

2x

as much than one-time
donors each year.

Monthly donors are

5x

more likely than a one-time donor to stick
around for at least three years.

The Importance of Monthly Giving

Monthly giving **increases annual income** by converting small one-time gifts to ongoing contributions.

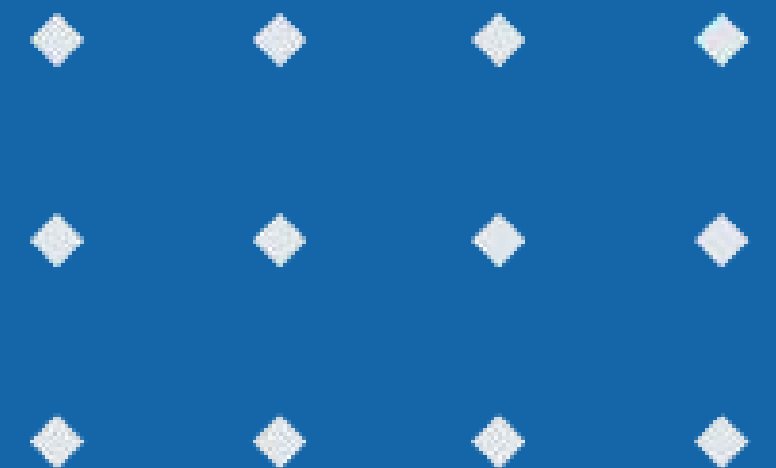
Monthly giving means sending fewer solicitations, and online Monthly giving means no postage at all, helping you **save on fundraising costs**.

Monthly giving **improves donor retention** because, on average, monthly donors give for five to seven years, instead of just once and then not again at all.

Monthly giving helps your organization **attain predictable income** so you can focus more on long-term programming and worry less about cash flow.

Tips to improve Monthly Giving

featuring..



Tips to improve monthly giving

Tip #1 - Identify monthly giving prospects

The best place to start is in your database, and segment based on **recency**, **frequency** and **monetary value**.

Monthly donors are...

- Those who have given to you in the past
- Have given to you recently
- Online one-time donors are great candidates for monthly giving
- Monthly donors are those who feel appreciated
- Candidates have given a single gift between \$5-\$99
- Supporters were asked!



Tips to improve monthly giving

Tip #2 - Have a clear offer

“Why should I give to your organization, and more specifically, why should I commit to being a monthly donor?”
These are questions that you need to answer. What is your donor’s “**Unique Reason to Give**”?

Think about:

- What is the right donation amount?
- What impact will this donation have?
- What else do you have to offer?
- How will you make this offer?



Tip #2 - Have a clear offer

ATLANTIC | News

National charity partners with Feed Nova Scotia to tackle food insecurity

“During March, if someone signs up for a new monthly gift to Feed Nova Scotia, Canada Helps will make an additional \$20 donation direct to Feed Nova Scotia,” said Theriault.

Theriault says \$20 allows Feed Nova Scotia to send out enough food for 30 meals.

“You can really maximize the impact of your gift,” she said.

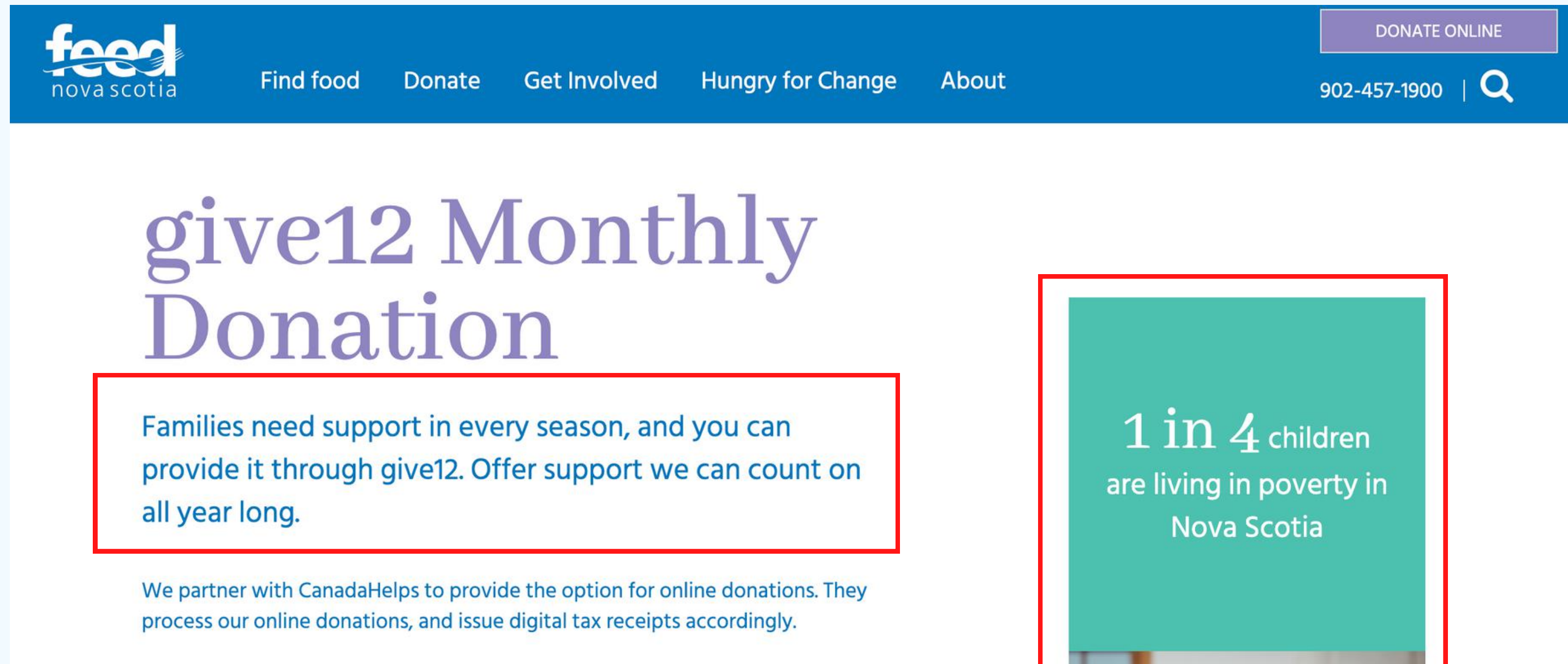
“We’ve already started to see a few new monthly donors sign up this month, specifically because of this offer.”

Canada Helps’ offer isn’t just for Feed Nova Scotia; Theriault says you can sign up for a monthly offer for any charity.

“Of course we hope that you’ll think of Feed Nova Scotia, but perhaps there is another charity that is close to your heart and I love that Canada Helps is looking for ways to help Canadians have even more impact in their local communities.”

Tips to improve monthly giving

Tip #2 - Have a clear offer



The screenshot shows the top navigation bar of the feed nova scotia website. The bar is blue with the logo on the left and links for 'Find food', 'Donate', 'Get Involved', 'Hungry for Change', and 'About' in the center. On the right, there is a 'DONATE ONLINE' button, the phone number '902-457-1900', and a search icon. Below the navigation bar, the main content area features the heading 'give12 Monthly Donation' in a large, purple, serif font. To the left of this heading is a red-bordered box containing the text: 'Families need support in every season, and you can provide it through give12. Offer support we can count on all year long.' Below this box is a smaller line of text: 'We partner with CanadaHelps to provide the option for online donations. They process our online donations, and issue digital tax receipts accordingly.' To the right of the heading is another red-bordered box containing a teal square with the text: '1 in 4 children are living in poverty in Nova Scotia'.

feed nova scotia

Find food Donate Get Involved Hungry for Change About

DONATE ONLINE

902-457-1900 | 🔍

give12 Monthly Donation

Families need support in every season, and you can provide it through give12. Offer support we can count on all year long.

We partner with CanadaHelps to provide the option for online donations. They process our online donations, and issue digital tax receipts accordingly.

1 in 4 children are living in poverty in Nova Scotia

Tips to improve monthly giving

Tip #3 - Make your giving program stand out

Hugely successful monthly giving programs that stand out with a look and feel that is different than their other fundraising programs.

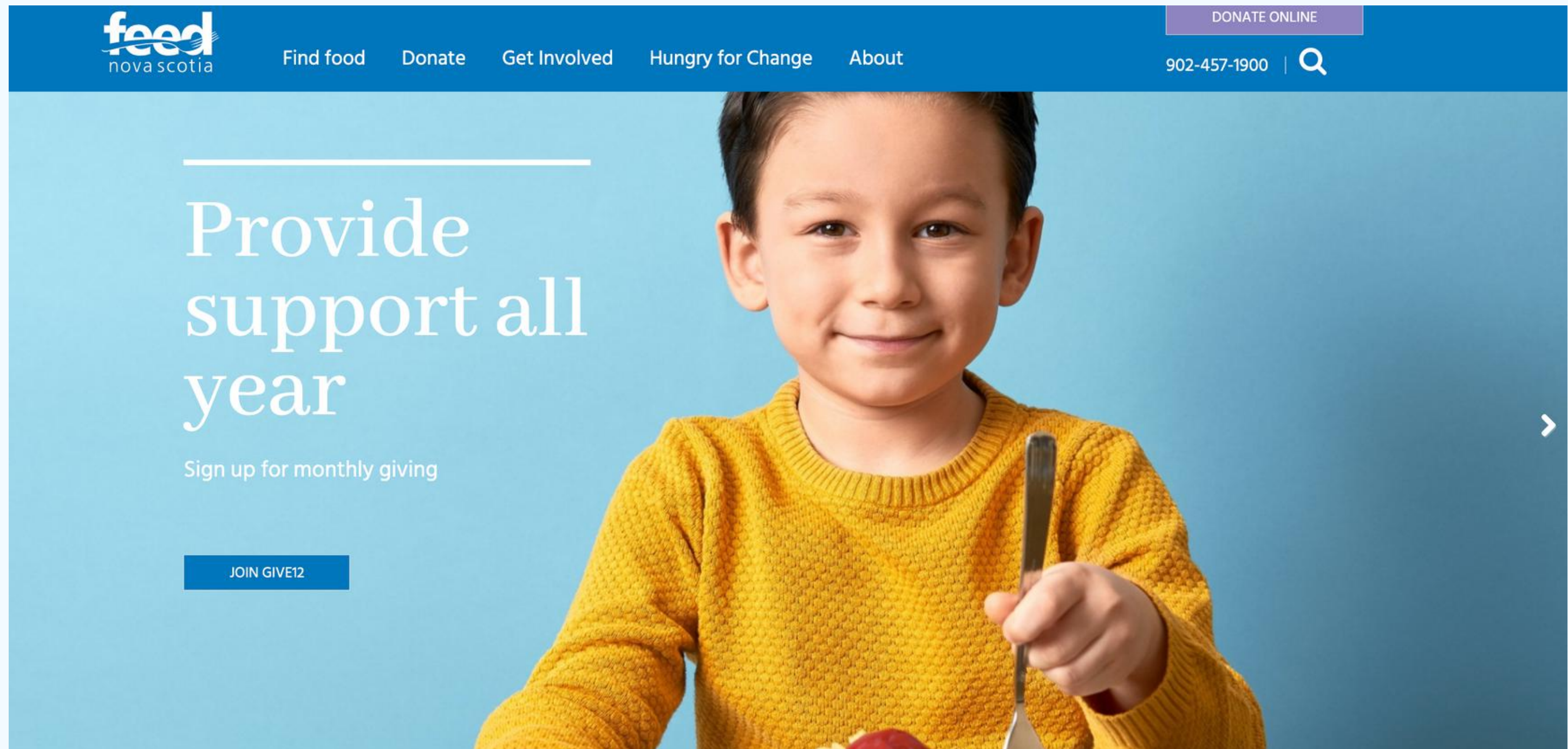
Some tips:

- Make monthly giving stand out as an option for donors.
- Consider giving your program a special name.
- Think of how you may set your program apart visually.
- Use urgency in your language.
- Ensure you create room in your ongoing communication to share impact and gratitude focused on monthly donors.
- Start simple.



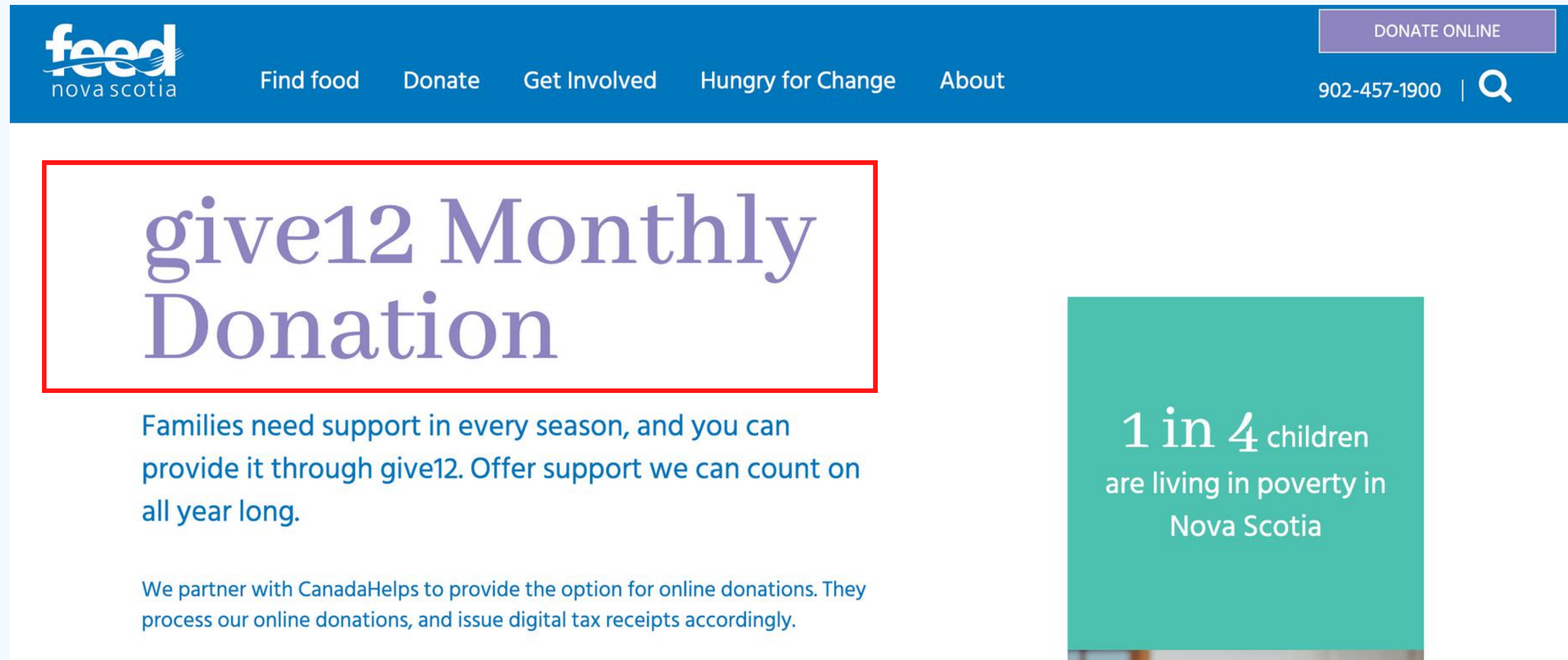
Tips to improve monthly giving

Tip #3 - Make your giving program stand out



Tips to improve monthly giving

Tip #3 - Make your giving program stand out




The screenshot shows the top navigation bar of the feed nova scotia website. The bar is blue with the logo on the left and navigation links in the center. A purple 'DONATE ONLINE' button is on the right. Below the navigation bar, a large white box with a red border contains the text 'give12 Monthly Donation'. To the right of this box is a teal box with white text stating '1 in 4 children are living in poverty in Nova Scotia'. Below the white box, there is a paragraph of text explaining the partnership with CanadaHelps.

feed
nova scotia

Find food Donate Get Involved Hungry for Change About

DONATE ONLINE

902-457-1900 | 

give12 Monthly Donation

Families need support in every season, and you can provide it through give12. Offer support we can count on all year long.

We partner with CanadaHelps to provide the option for online donations. They process our online donations, and issue digital tax receipts accordingly.

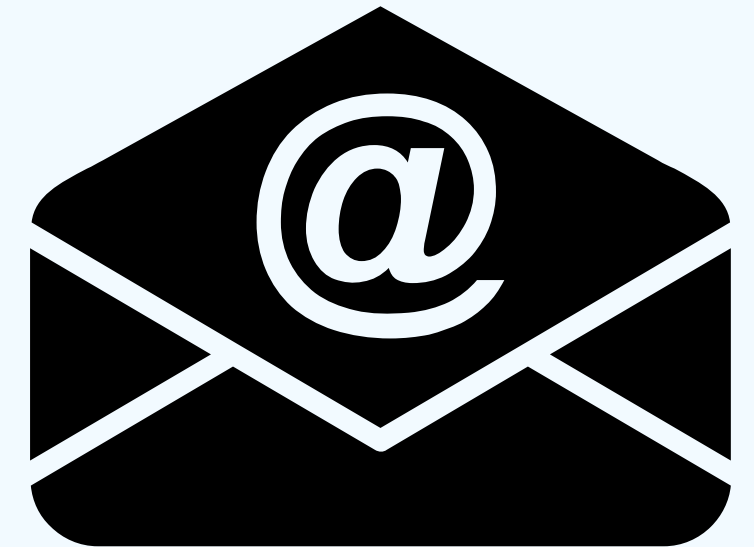
1 in 4 children are living in poverty in Nova Scotia

Tips to improve monthly giving


Tip #4 - Be strategic with the location of your ask

How you ask will be determined by **what has worked well for your organization in the past**, and what will be the most cost-effective moving forward.


1. Email
2. Donation Forms
3. “Ways to Give” Landing Page
4. Social Media
5. Special Incentives





Tip #4 - Be strategic with the location of your ask


[Find food](#)[Donate](#)[Get Involved](#)[Hungry for Change](#)[About](#)

DONATE TO A CAMPAIGN

[General donation](#) 


[Planned Giving](#) 


[Give12 Monthly Donation Program](#) 





Families need support in every season, and you can provide it through give 12. Offer support we can count on all year long.


[DONATE](#)


[Donate Securities and Mutual Funds](#) 


[In Memory](#) 

[Celebrate a Birthday](#) 

[Celebrate a Wedding](#) 

[Celebrate an Anniversary](#) 

[Thank a Teacher](#) 

[Find food](#)[Donate](#)[Get Involved](#)[Hungry for Change](#)[About](#)

[DONATION DETAILS](#)

[DONATE ONCE](#)[DONATE MONTHLY](#)

DONATION AMOUNT

\$

Donation Amount

per month

Write a private message to us (optional)

DONOR & TAX RECEIPT INFORMATION

Email Address*

☐ This is a corporate donation

First Name*

Last Name*

ADDRESS*


Address Line 1*

Address Line 2 (optional)


City*

CANADA

Tip #4 - Be strategic with the location of your ask

 **Feed Nova Scotia**
@feednovascotia

Throughout March, create a new monthly gift of \$20 or more in support of our charity through [@canadahelps](#), and they will make a one-time extra \$20 donation to our cause! Sign up for give12, our monthly giving program, right here: [feednovascotia.ca/.../give12-mon...](#)



8:55 AM · Mar 4, 2022

New! Prompt for Monthly

Prompt for Monthly is the latest feature available on all of your multi-step donation forms proven to increase monthly giving.

We've already tested the prompt to monthly on CanadaHelps.org, where Canadians can give to any registered charity, and seen the positive results for growing donor loyalty and amount given, where monthly transaction conversion rates and monthly gift amounts have **grown by 15%**!

The screenshot shows the 'Make a donation' section of the CanadaHelps.org website. At the top, there is a logo for 'Wellness Avenue' with a rainbow icon, a business number 'BN: 896568417RR0001', and a language selector 'FR'. Below this is the heading 'Make a donation'. The form has two main buttons: 'DONATE ONCE' and 'DONATE MONTHLY', with the latter being highlighted in yellow and featuring a heart icon. Underneath these buttons is the 'DONATION AMOUNT' section, which includes four preset buttons: '\$30', '\$75', '\$100', and '\$200'. Below these is a 'Custom Amount' field with a dollar sign icon. The 'FUND' section features a dropdown menu currently set to 'Area of Greatest Need' and a text input field for 'Write a private message to us (optional)'. There are also checkboxes for 'Dedicate your donation' and radio buttons for 'In memory of' and 'In honour of'. At the bottom of the form is a large yellow 'Donate' button.

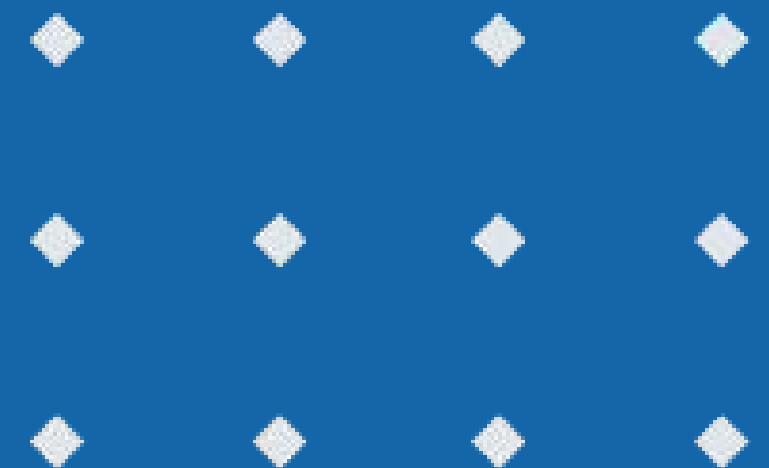
New! Prompt for Monthly

Turn on **Prompt for Monthly** now by following these easy steps:

1. Log in to your CanadaHelps Charity account.
2. Select any one of your multi-step donation forms.
Not currently using a multi-step form? Learn how to set one up here.
3. Choose to edit the form and scroll to the Monthly Prompt section.
4. Click the check box and fill in the necessary fields!

The screenshot shows a donation form for 'Wellness Avenue'. At the top, the logo and 'BN: 896568417RR0001' are visible, along with a language selector set to 'FR'. The heading 'Make a donation' is centered. Below it, there are two buttons: 'DONATE ONCE' and 'DONATE MONTHLY' (which is highlighted with a heart icon). The 'DONATION AMOUNT' section includes four preset buttons: '\$30', '\$75', '\$100', and '\$200', followed by a 'Custom Amount' field with a dollar sign icon. The 'FUND' section features a dropdown menu currently set to 'Area of Greatest Need', a text area for 'Write a private message to us (optional)', and a checkbox for 'Dedicate your donation'. Below the checkbox are two radio button options: 'In memory of' and 'In honour of'. At the bottom, a yellow 'Donate' button is displayed, preceded by a progress indicator showing three dots, with the first dot being filled.

Make It Monthly



Coming This March!



For the month of March, CanadaHelps will donate to a participating charity an additional \$20 for each new monthly donation of \$20 or more that is made to the same charity via CanadaHelps at least three times before June 2, 2023, to a maximum aggregate amount of donations from CanadaHelps to all participating charities of \$50,000 CAD.*

*Terms and conditions apply. Please click [here](#) for the full terms and conditions.

Scenario #1

Existing Donor creates a NEW monthly gift, starting in March 2023.

Your charity will receive a one-time \$20 gift from CanadaHelps (see full terms and conditions)

Scenario #2

Existing MONTHLY Donor continues their gift in March 2023.

Your charity will not receive a one-time \$20 gift from CanadaHelps (see full terms and conditions)

FAQs

When will our charity expect to receive the extra \$20 funds?

If your charity meets the promotion eligibility, disbursements of the \$20 funds will occur before July 15, 2023 and be displayed as Make It Monthly 2023 in your charity disbursement reports.

FAQs

Can our charity share this promotion with our supporters?

Yes! We encourage you to share this promotion with your supporters starting March 1st. Please note that when the promotion is shared, your charity must include the following terms and conditions in each of your marketing materials:

*Make It Monthly 2023 \$20 Offer is valid for new scheduled monthly donations of a minimum of \$20 per month beginning March 1st, 2023 at 12:01 AM Newfoundland Standard Time (NST) to March 31st, 2023 at 11:59 p.m. Pacific Standard Time (PST). CanadaHelps will donate an additional \$20 for each new monthly donation of \$20 or more that is made three times before June 2, 2023, to a maximum aggregate amount of \$50,000 CAD. See full terms and conditions: www.canadahelps.org/en/make-it-monthly-terms-and-conditions

FAQs

Does our charity have to register to participate in this promotion?

No, your charity does not have to register in advance to participate in this promotion. Please note that all charities and gifts to your charity must meet the eligibility requirements outlined in our terms and conditions to receive promotion funds.

FAQs

Are new monthly donations set up via our Customizable Donation Form eligible for the donation?

Yes! New monthly donations made via your charity's Customizable Donation Form are eligible for this promotion. For a full list of eligible donation sources, please read our terms and conditions.

FAQs

If I set up a new monthly donation via our Donor Management System, is that eligible for the promotion?

No, new monthly donations that are created using your Donor Management System are **not eligible** for this promotion. For a full list of eligible donation sources, please read our terms and conditions.

FAQs

Do you have any toolkits or learning materials my charity can use to develop our campaign?

Yes! Please visit our page linked here: [English](#) / [French](#) for resources your charity can use in order to leverage the Make It Monthly campaign.

When in doubt..

Step 1:

Check Full Terms and Conditions

Step 2:

Reach out to info@canadahelps.org



Resources for Make It Monthly

Email Templates



Template 1: Letting Your Donor Base Know

When to use:

- All throughout the month of March 2023
- When introducing Make It Monthly to your donors for the first time
- The first email in a campaign for new monthly donors

Why it's important:

- Make it Monthly is new to you, and it's new to donors. This will give them a better understanding of what to expect.
- It gives your team something that you can reference if anyone ever has any questions

Hello [donor],

I hope this message finds you well. I wanted to let you know about a new monthly donation campaign we're starting up in March and invite you to participate.

Monthly donations are a great way to make a big impact and help us achieve our goals for the year. With your help, we can continue our work **[INSERT DETAILS ABOUT YOUR WORK]**. And for a limited time, we can help increase the impact of your gift.

Throughout March, create a new monthly gift of \$20 or more in support of our charity through CanadaHelps, and CanadaHelps will make a one-time extra \$20 donation to our charity!* You read more about the [full terms and conditions here](#).

Please consider creating a new monthly gift of \$20 or more through CanadaHelps to support our charity. Your donation will help us achieve our goals and make a big impact. Thank you for your support!

Sincerely,

[Your name]

*Make It Monthly 2023 \$20 Offer is valid for new scheduled monthly donations of a minimum of \$20 per month beginning March 1st, 2023 at 12:01 AM Newfoundland Standard Time (NST) to March 31st, 2023 at 11:59 p.m. Pacific Standard Time (PST). CanadaHelps will donate to a participating charity an additional \$20 for each new monthly



Template 2: Step-By-Step Instructions

When to use:

- When introducing Make It Monthly to your donors for the first time
- One of the first emails in a campaign for new monthly donors

Why it's important:

- You want to make this experience as easy as possible for your donors. Remove any potential barriers by giving a step-by-step explanation

Dear [donor],

Thank you for your support of our charity. We're excited to announce a new monthly donation campaign that we're starting in March.

Throughout March, make a new monthly gift of \$20 or more through CanadaHelps, and CanadaHelps will make a one-time extra \$20 donation to us!* You can read the [full terms and conditions here](#).

Here's how you can get involved:

Step 1: Go to our Donation Page **[LINK TO CANADAHHELPS CUSTOM DONATION FORM]** or our CanadaHelps Page **[LINK TO CANADAHHELPS PROFILE]**.

Step 2: Schedule a monthly gift of \$20 or more.

Step 3: Confirm your gift.

That's it! For each eligible monthly donation, CanadaHelps will be adding a one-time \$20 donation to supercharge your gift.*

Your support will help us achieve our goals and make a big impact. Thank you!

Sincerely,



Template 3: Last Minute Push

When to use:

- Anytime from the midpoint of the month to the end of the month

Why it's important:

- This creates a sense of urgency
- It builds on momentum
- It taps into the emotion of donors to help you cross the finish line.

Hi [donor],

By now, you've heard us talk about our monthly giving program quite a bit. And guess what?

There's still time to contribute!

Monthly giving is one of the most efficient ways to donate. You don't have to worry about remembering to give every year, and it's a great way to make a big impact. Plus, for a limited time, we can help increase the impact of your gift.

Throughout March, create a new monthly gift of \$20 or more in support of our charity through CanadaHelps, and CanadaHelps will make a one-time extra \$20 donation to our charity!* You read more about the [full terms and conditions here](#).

Please consider creating a new monthly gift of \$20 or more through CanadaHelps to support our charity. There's an expiry date to this offer – so don't wait! Your donation will help us achieve our goals and make a big impact.

Thank you for your support!

Sincerely,

Your name



Resources for Make It Monthly

Monthly Giving Email Course

EMAIL COURSE

Growing Your Monthly Donors

Level Up Your Monthly Gifts with Our Free Email Course

From the comfort of your inbox and on your schedule, you can learn monthly giving best practices to boost your program.

What will you learn over the 10-part email series?

1. Learn how to identify monthly prospects and build a robust monthly giving program,
2. Understand how to set monthly giving goals,
3. How to retain monthly donors and much more!

Register today!

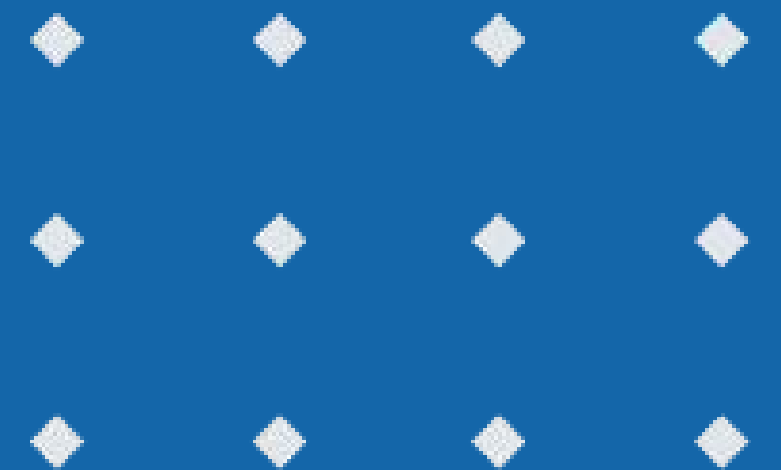


Resources for Make It Monthly

Logos to use for social media



Q&A



Contact Us



info@canadahelps.org

1-877-755-1595

www.CanadaHelps.org

@CanadaHelps

Make It Monthly Terms and Conditions | CanadaHelps - Donate to any charity in Canada

Make It Monthly Terms and Conditions *Make It Monthly 2023 \$20 Offer is valid for new scheduled monthly donations of a minimum of \$20 per ... [Read more](#)

 [CanadaHelps /](#)