

How to Create a Monthly Giving Donation Form That Converts

7 monthly giving form best practices that increase donor retention and revenue

I want to give*

One-time Monthly

\$10 \$20 \$30 \$50

Contact

First Name* Last Name*

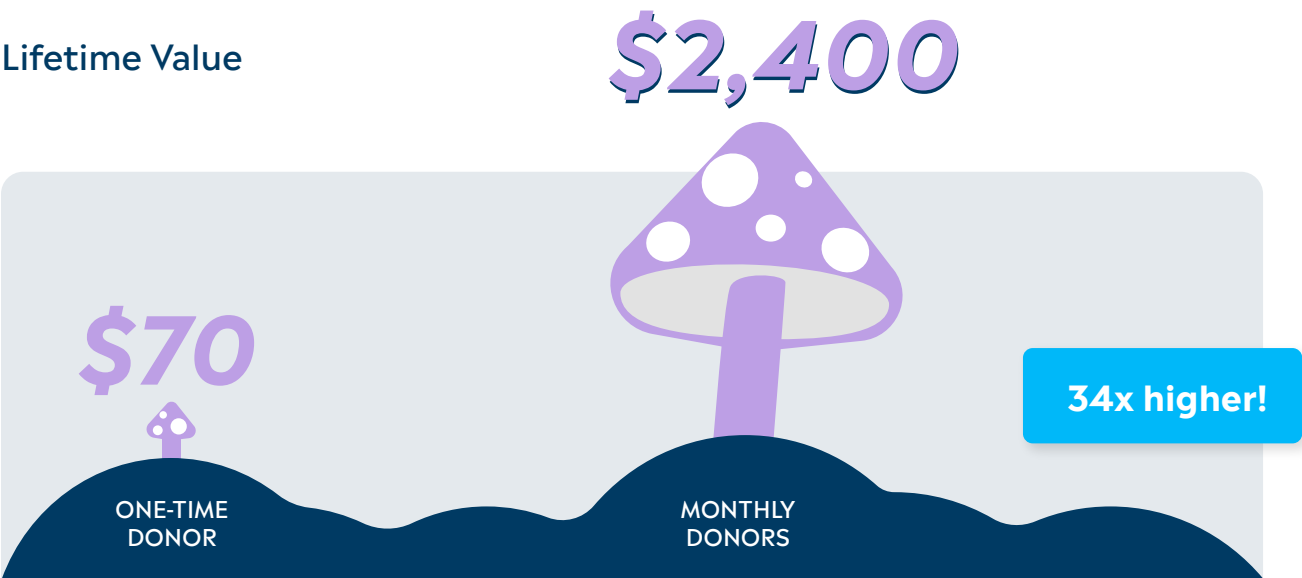
Address* Address 2

City* State* Zip*

Select a state v

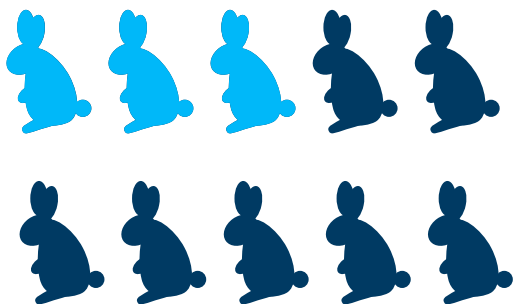


A [monthly giving program](#) provides revenue that your nonprofit can rely on, allowing you to confidently and accurately forecast your future initiatives. When consistent donations empower your organization, you can better budget for your goals and enlist the right resources to accomplish them.

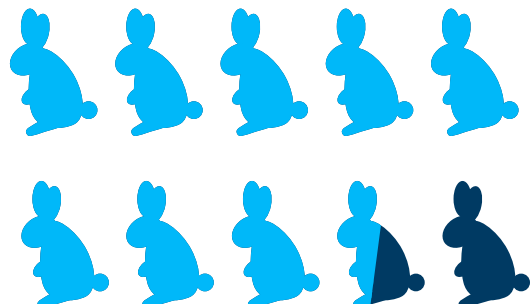


Median amounts based on an average lifetime of over 6 1/2 years.

Only **3** out of **10** one-time donors give again



8.5 out of **10** monthly donors continue giving year after year



The numbers: Why start a monthly giving program?

Simply put, monthly donors give more. While only 3 out of 10 one-time donors give again, 8.5 out of 10 monthly donors continue giving year over year.

Think of it this way: what if a dedicated group of donors could fully fund an entire year's worth of projects? To put it into perspective, gifts from just half of your monthly donors can amount to 65% of your overall revenue.

With monthly donors giving more (and more often), your [donor retention rate](#) naturally rises. In fact, nonprofits who create an [automatic monthly giving](#) program through DonorPerfect have an average monthly donor retention rate of 90%!

While it's easy enough to include a recurring gift option on your existing [donation form](#), when you stop your monthly giving initiative there, you miss out on the wealth of knowledge and opportunities that come from a full-fledged monthly giving program.

Learn how to help monthly donors find you, foster a sense of community, and promote your program. [Check out Growing Your Monthly Giving Program >>](#)

#1. Create a dedicated form just for your monthly giving program

To start, you will want to create a unique page on your website to house your monthly giving form for two reasons:

- 1) A [dedicated monthly giving donation form](#) allows for easy sharing on social media, so you can effectively promote your monthly giving campaign online.
- 2) You can easily send your form to specific contacts to [keep them engaged](#) — whether your goal is to upgrade donors who already give somewhat often, or reconnect with donors who have fallen off your radar.

To earn and maintain your donors' trust, be sure to brand your new monthly giving form to match your website. Many online donors will drop out of the donation process if they are sent to a third-party website because they want to know their support is going to the right place.

Keep in mind that monthly giving is popular across diverse donor groups, so your [donation form](#) should be accessible to all who want to give monthly — even if they're doing so offline.

Here's how to keep your program inclusive:

Make your form mobile-friendly

Donors will be accessing your monthly giving form from a variety of devices. Make sure your form is mobile-friendly so everyone has the experience you intended.

Allow different payment types

Be careful not to alienate donors who don't use your preferred payment method. It's important to

accept multiple payment methods so anyone can sign up. Along with accepting credit and debit, let donors know the address and phone number where they can mail payments or phone them in.

With DonorPerfect, you can create an unlimited number of custom donation forms — that handle data entry for you — for each specific program, fund, or campaign. DonorPerfect's affordable software subscriptions also offer a wealth of monthly giving program management features, including Constant Contact email marketing to promote your program and provide impact updates.

#2. Build community by naming your monthly giving program

Since it's the first thing supporters will see on your donation form, give your monthly giving program a name that shows they're a part of something bigger. Start gaining interest at first sight by choosing a name that highlights the qualities of your most dedicated donors, or fosters a feeling of community. Your wording can make all the difference!

3 ideas for naming your program:

IDEA #1:

Create a sense of belonging by pulling at monthly donors' heartstrings, referring to them as the faces behind the cause.

Words: Friend, Supporter, Champion, Advocate, Ally, Defender, Benefactor

Ex. The Paws + Claws Friends Club

IDEA #2:

Dedicate your monthly giving program to the impact that your donors' gifts will make possible. Identify the specific need that the monthly revenue will fund.

Words: Project, Operation, Conservation, Collective, Coalition

Ex. Project Furever Home, Operation Save Puppy Park

IDEA #3:

Let your monthly donors know that they're investing in the continued success of your organization, and the overall goal of your work.

Words: Partner, Provider, Conservator, Peacekeeper, Sustainer

Ex. Partners of Paws + Claws

[Check out 30 Names for Your Monthly Giving Program for more examples >>](#)

#3. Encourage donations with default gift amounts

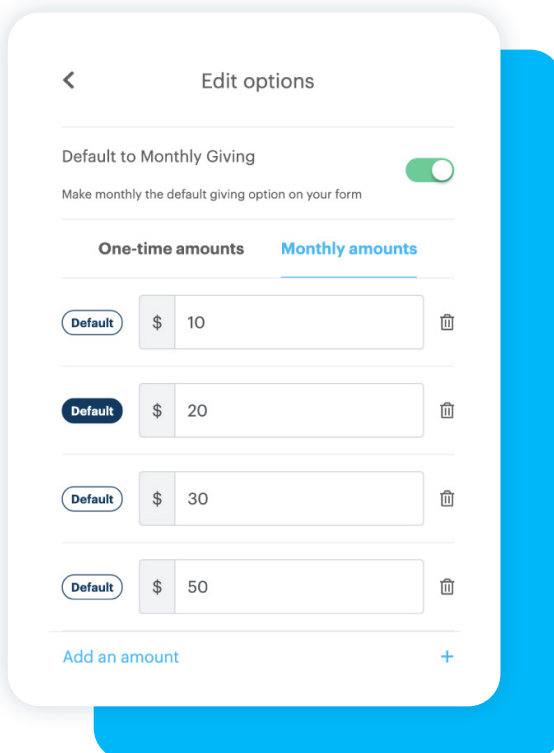
Once you have your monthly giving program up and running, you can analyze your [monthly donor data](#) to gauge the appropriate ask. Specifically, you want to look at your average monthly gift amount. To find it, you can divide your total donations within a specified date range by the number of donors who gave during that time. This process is made much easier when you can quickly [run a report](#) using your CRM.

[Learn how to check your average donation with DonorPerfect reports >>](#)

Knowing the ideal ask amount requires analyzing your form data to determine your organization's average online donation, and then learn which default donation amount results in more revenue. DonorPerfect offers intuitive reporting and monthly giving program metrics to inform your decisions.

To start, try suggesting a range of gift amounts and leaving a fill-in-the-blank option. You'll want to use your average gift amount for reference, or try an amount slightly higher than your average to drive up donations.

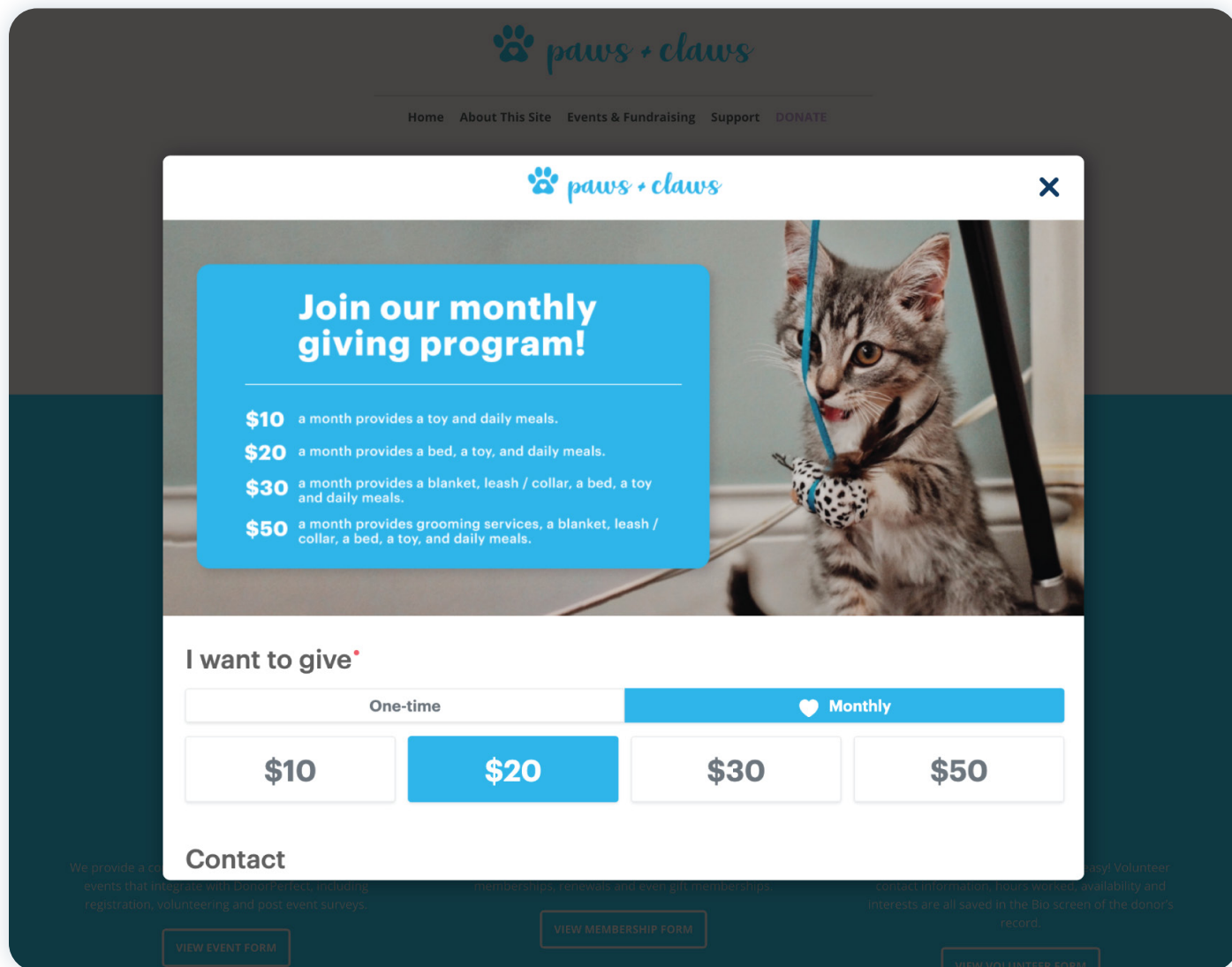
For example, if you set your default amounts at \$50, \$35, and \$20, donors will quickly see that a greater impact can be achieved for only \$15 more. Then, those who want to donate more than the average \$50 will be able to write in their amount. These numbers can be raised over time to test out the best default gift amounts for your program.



The screenshot shows the 'Edit options' screen in DonorPerfect. At the top, there's a back arrow and the title 'Edit options'. Below that, a toggle switch for 'Default to Monthly Giving' is turned on, with the text 'Make monthly the default giving option on your form' underneath. A horizontal bar separates this from the 'One-time amounts' and 'Monthly amounts' sections. The 'Monthly amounts' section is active, showing a list of default gift amounts: \$10, \$20, \$30, and \$50. Each amount has a 'Default' label and a trash icon. At the bottom, there's a link to 'Add an amount' with a plus icon.

#4. Invite donors to join your monthly program with a pop-up form

You likely have supporters who want to give on a more consistent basis, but aren't aware of your monthly giving program just yet. A great way to get the word out and extend the invite is by adding a pop-up form to your primary donation page — or any other place on your website that you feel is appropriate. If they're already interested in your mission, why not ask them to consider a monthly gift?



The screenshot shows a website for 'paws + claws' with a navigation bar including Home, About This Site, Events & Fundraising, Support, and DONATE. A pop-up form is displayed over the main content area, which features a background image of a kitten. The pop-up has a blue header with the 'paws + claws' logo and a close button (X). The main text reads 'Join our monthly giving program!'. Below this, there is a list of donation levels with their respective benefits:

- \$10** a month provides a toy and daily meals.
- \$20** a month provides a bed, a toy, and daily meals.
- \$30** a month provides a blanket, leash / collar, a bed, a toy and daily meals.
- \$50** a month provides grooming services, a blanket, leash / collar, a bed, a toy, and daily meals.

Below the list, there is a section titled 'I want to give' with two radio buttons: 'One-time' and 'Monthly' (selected). Underneath, there are four buttons for donation amounts: '\$10', '\$20' (highlighted in blue), '\$30', and '\$50'. At the bottom of the pop-up, there is a 'Contact' section with three buttons: 'VIEW EVENT FORM', 'VIEW MEMBERSHIP FORM', and 'VIEW VOLUNTEER FORM'. The background website content is partially visible through the pop-up, showing text about events, memberships, and volunteer information.

Pop-up forms are ideal to promote monthly giving levels, recruit funders for a dedicated project, and spotlight sponsorship opportunities. When you integrate Constant Contact Email Plus with DonorPerfect, you can create an unlimited number of custom pop-up forms for your website.

#5. Show donors the impact of their monthly gift

To maintain your monthly donors' engagement, you'll want to [keep communication open](#) and provide periodic updates about the impact of their generous commitment.

2 main places you'll want to share the impact of your monthly donors:

Before they give: On your monthly giving form

An effective monthly giving program shows donors how they will make a difference before they even decide to join, so your donation form should explain exactly what their dedication will do. For example, an animal rescue might say, "\$10 a month provides a toy and daily meals."

Join our monthly giving program!

\$10 a month provides a toy and daily meals.

\$20 a month provides a bed, a toy, and daily meals.

\$30 a month provides a blanket, leash / collar, a bed, a toy and daily meals.

\$50 a month provides grooming services, a blanket, leash / collar, a bed, a toy, and daily meals.

After they sign up: In your email engagements

With a dedicated monthly giving form and reporting features to track its success, you can share impact stories via email in a variety of ways. [Highlight milestones on a timeline](#), [provide statistics](#) in an infographic, show progress on a graph, or even send a [personalized video message](#) — however you want to visualize it.



Daisy Is So Grateful
for the Gift of **YOU!**



Hi Kate,

Thank you for being a Paws + Claws Friends Club Sponsor. Because you're such a big part of Daisy's life, we want to keep you posted on all the good stuff your generosity and dedication have made possible.

Through the expert grooming services we're able to give Daisy together thanks to your sponsorship, she's feeling fine and frisky after her aromatherapy bath and adorable new haircut.

Debbie, our Shelter Manager, says, "Daisy will have no problem standing out to a wonderful family who will be excited to bring her home and give her the back scratches and squeaky toys she loves so much. Thank you for making this magical makeover happen!"

From Daisy and all of us here at Paws + Claws Animal Rescue, thank you for being a Paws + Claws Friends Club Sponsor.

Best,
Sharon Parr, Executive Director at Paws + Claws

#6. Reconcile payments with automatic receipting

Your donor's journey shouldn't end after their donation, especially if it's their first. An [automatic email receipt](#) sets the tone for your relationship moving forward and shows that your organization is trustworthy and on the ball. Personalizing your email receipts with name and gift information allows you to make this connection.

Few communication managers have the time to personalize each email they send out, especially with split or consolidated gifts. That's where **merge fields and dynamic content** come in - using information stored in your database, you can customize each email receipt with your donors' names, gift amounts, and more.

Automating your monthly giving receipts saves time and increases donor retention. DonorPerfect automatically sends email receipts to Monthly Giving donors processed manually as a **one-time batch**. Using DP Mobile, you can customize email receipts with a logo, personalized subject line, and additional text to encourage further involvement.

To take your [donor relationships](#) a step further, you can and should take this opportunity to acknowledge their contributions to foster future donations. Especially in a monthly giving program, you will want to acknowledge their critical role in your mission.

Pro tip: The most effective way to thank donors immediately is to create a page for them to land on after their payment has been processed. The benefits of a thank-you page are two-fold. Donors will be waiting for confirmation of their payment, so you have their undivided attention. Plus, you can add social media buttons that encourage them to follow your organization on Facebook or Twitter for updates on the impact of their funding and to stay connected with your mission.

#7. Develop a monthly giving promotional campaign

Email and social media promotions will reach the majority of your donors, so it's good to have strong marketing content in those channels. Set a goal for how many monthly donors you want to gain in your first month, then try increasing your goal each month. As daunting as it may seem, however you choose to grow your program, up to 90% of the donors who sign up are here to stay!

Ideas for social media and email:

- Promote monthly giving levels
- Recruit funders for dedicated projects
- Spotlight sponsorship opportunities

We talked earlier about making your program inclusive for all donors who want to participate. With donors who don't visit your website or check their emails, you can still promote your program in a personal way through **events, video conferences, and phone calls**.

No matter how you promote your monthly giving program, be sure to show donors how to sign up - and adjust your call to action to best suit the circumstance. For example, over the phone, you can offer to take their account information and enter it into your system. At a virtual event, you can display a signup link on your screen while speaking about your monthly giving program.



Become a Friend of Paws + Claws



Hi Jeff,

Thanks to our Friends of Paws + Claws and their generous monthly donations, Paws + Claws Animal Rescue can deliver the many resources and services that shelter pets like Chance rely upon.

Here's how much your monthly gift matters to animals in need:

- \$5 a month provides a shelter dog and cat with daily meals.
- \$10 a month provides a shelter dog and a cat with daily meals and a toy.
- \$20 a month provides a shelter dog or cat with a bed, a toy, and daily meals.
- \$30 a month provides a cat or dog with a blanket, a leash/collar, a bed, treats, a toy, and daily meals.
- \$50 a month provides a dog or cat with grooming services, a bed, a leash, a toy, a blanket, and daily meals.

What Kind of Change Would You Like to Create?

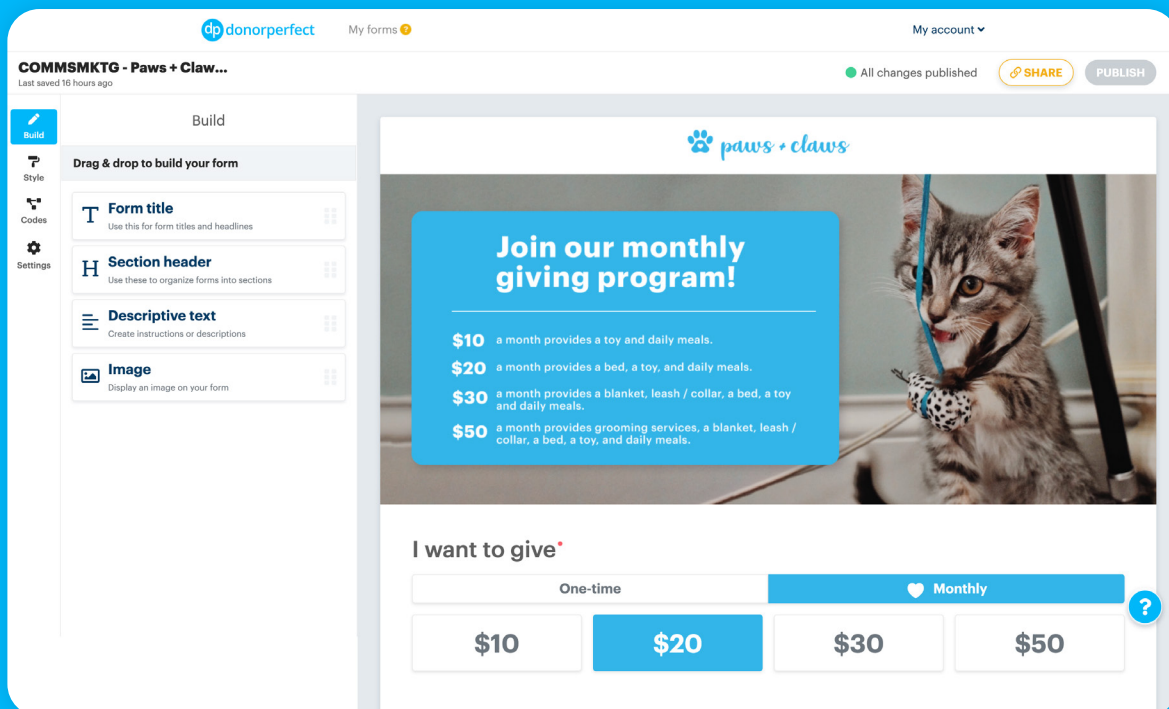
Join The Paws + Claws Friends Club, our monthly donor program, today to support our mission of caring for homeless pets all year long.

JOIN NOW

Getting started is always easier with expert advice. Kick-off your program with our [Monthly Giving Template Kit](#) and get free resources you can use today!

Effortlessly manage your monthly giving program today with DonorPerfect

There are several components of a successful monthly giving program, but you aren't without assistance. DonorPerfect has your back with the digital tools to make it happen.



Most DonorPerfect subscriptions include everything you will need to launch and grow your monthly giving program:

- Comprehensive donor CRM
- Integrated monthly giving forms
- Automatic monthly gift processing
- Constant Contact email marketing
- Personalized donation receipts
- Intuitive reporting and program metrics

GET A DEMO VISIT [DONORPERFECT.COM/DEMOS](https://donorperfect.com/demos)