

# MONTHLY DONATION PROGRAM CHECKLIST

## BEFORE YOU BEGIN

- Have a clear answer for why people should give to your organization monthly
- Identify the programs or projects donors can give to
- Create donor benefits, such as t-shirts, mugs, plaques, bricks, etc.
- Consider offering tiers of donor benefits based on giving levels



## APPROACHING DONORS

- Build relationships with your supporters and donors
- Know your donor base and what inspires them
- Segment your donors for different donation requests
- Use different communication methods based on your donors' preferences
- Start with your most loyal donors
- Think of donors as investors in your nonprofit

## OPTIMIZING YOUR ONLINE DONATION PAGE

- Ensure that people can easily find your donation page via a clear Give or Donate button on your website
- Keep the user experience as simple as possible
- Brand the page with your organization's logo and colors
- Make sure your page is clean, simple, and uncluttered
- Keep your messaging short and your main point the main point
- Include a compelling image
- Decide whether to customize different forms for each program or include those options on a single form
- Make sure your form is sharable for emails, social media, etc.
- Give donors the option to pay transaction fees when they donate

## ENGAGING YOUR DONORS

- Talk about the impact your nonprofit is making
- Explain where people's donations go and what donors can help accomplish
- Show how your cause is relatable
- Share stories of donor involvement and what your mission means to them
- Create a sense of ownership and community
- Initiate donor feedback for two-way communication

## MANAGING YOUR MONTHLY DONATION PROGRAM

- Identify who will monitor and track donations that are received
- Decide who will follow up with lapsed donors
- Steward your donations well
- Be transparent and accountable with people's gifts
- Add a monthly donation option to all your fundraising materials

## TOOLS FOR TRACKING DONORS AND DONATIONS

- Capture donor information on your forms and at your fundraising events
- Use a reliable, secure database to manage your donors
- Utilize software that links your online donations to your accounting
- Automate donation management using a secure system
- Utilize digital communication tools for thanking and following up with donors

## THANKING YOUR DONORS

- Thank your donors frequently
- Treat donors as friends; don't let your donor relationships become transactional
- Thank donors in various ways with different messaging rather than repeatedly sending the same form letter
- Keep communications as personal as possible
- Involve your staff, volunteers, and board members when writing thank you notes or making phone calls



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