

# How to Use Qgiv's Tools to Boost Year- End Donor Retention

---

Thursday, September 28 | 2:00-2:30 p.m. EDT



# Learn to raise more online

Want to learn how to raise more money online? We'd love to show you!

Visit us at [www.qgiv.com](http://www.qgiv.com)





**We're recording this webinar!** We'll send you a copy after the webinar is complete.



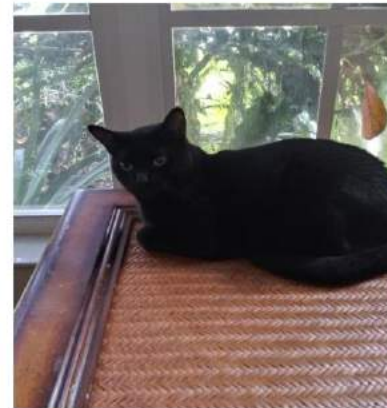
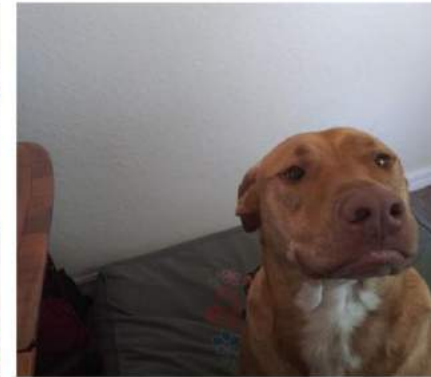
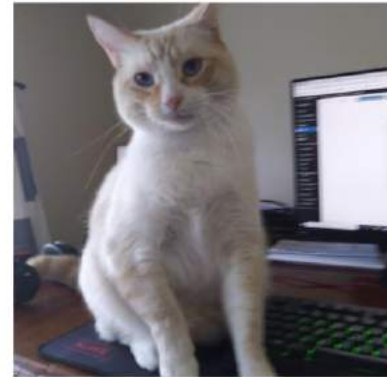
**Feel free to ask questions!** Use the chat box for general discussion and the Q&A option below to ask your questions: we'll answer them in a Q&A section at the end of the presentation.



Share your highlights and takeaways with the **#qgivwebinar** hashtag, and make sure you follow **@Qgiv!**

# Who's Talking Today?

- + With Qgiv for three years
- + Digital marketing and optimizing the user journey are my areas of expertise
- + I enjoy volunteering
- + I have 5 animals: 3 dogs and 2 cats





# Why recurring?

---

There's so much to do this time of year. Why should we focus on recurring giving?

# Reason #1: Recurring Donors Stay Longer

**2x**

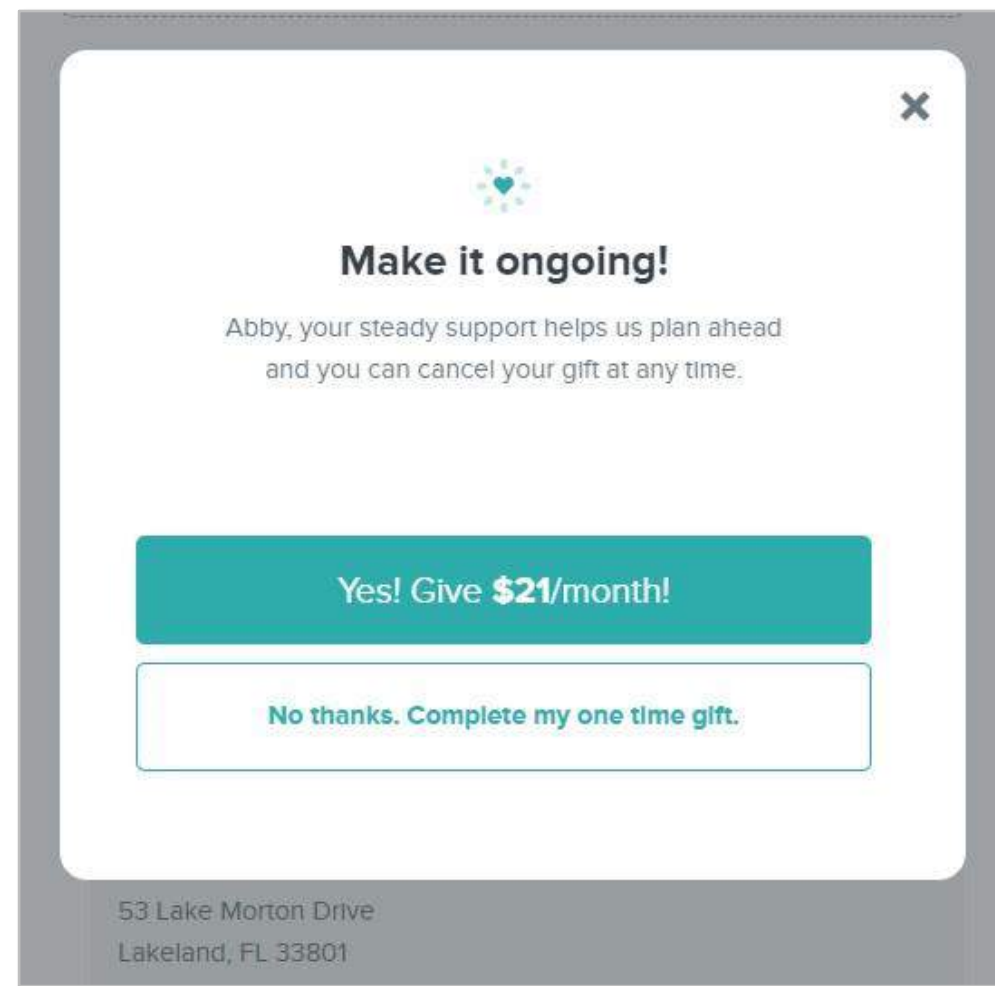
Recurring donors are more likely to support their favored nonprofit beyond one year

Donors are willing to set up recurring gifts!

**90%+**

Average retention rate for monthly donors after one year

Source: NextAfter, Bloomerang



## Reason #2: Recurring Donors Give More

**42%**  
more

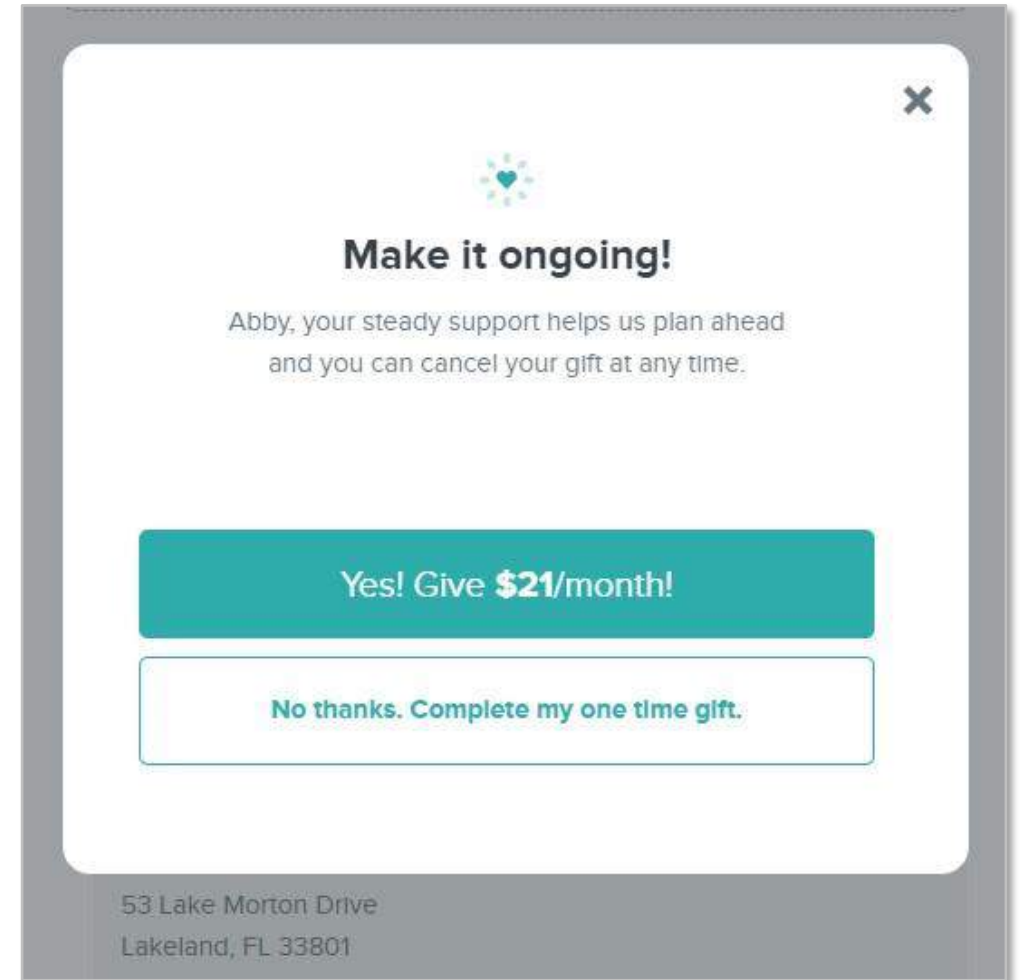
Over the course of a year, recurring donors give more than one-time donors

Recurring donors have a higher lifetime value compared to one-time donors

**5.4x**

Recurring donors give more than one-time donors over their lifetime

Source: NextAfter



## Reason #2: Recurring Donors Give More

Donor “A” Gives a One-Time Gift: **\$100**

Donor “B” Sets up a Recurring Gift: **~\$12**

For 12 months

For a total of **\$144**

Over 5 years:

One-time- \$500

Recurring- \$720

Over 10 years:

One-time- \$1,000

Recurring -\$1,440



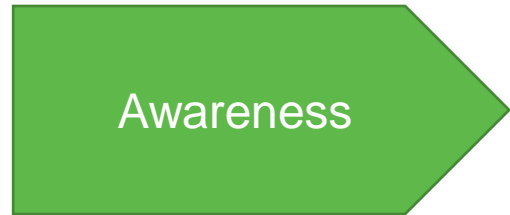


# What We'll Cover Today

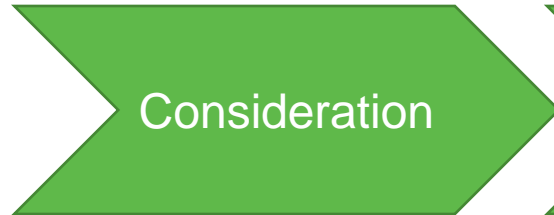
We'll take a look at how to increase recurring gifts, how to encourage donors to upgrade their one-time gift, and past year-end giving campaigns and show you how to:

- + Build awareness of recurring giving options
- + Optimize donation pages and donation forms
- + Build loyalty and inspire advocacy
- + How to do this with Qgiv

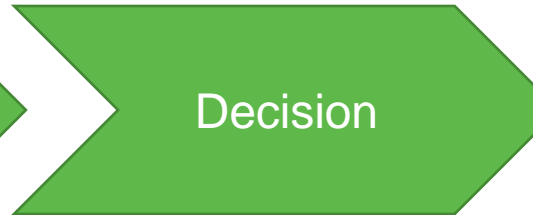
# Donor Journey Recap



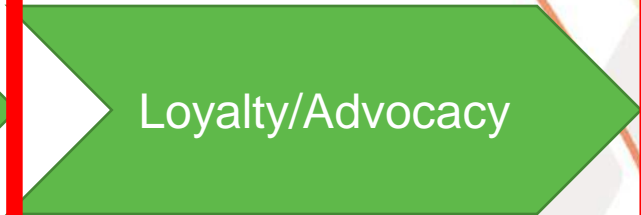
Ads, emails, blog posts, press releases, social media, etc.



3<sup>rd</sup> party sites like Charity Navigator, website pages like the about us page or pages dedicated to describing your cause, etc.



Website pages, donation pages.



Receipts, thank-you pages, thank-you emails, additional ask emails, donation page, etc.



Build awareness of  
recurring giving options

---

# Ask for recurring gifts

Craft specific messaging for your year-end and Giving Tuesday appeals to encourage recurring gifts!

- + Mention this option in year-end and Giving Tuesday appeals.
- + Send dedicated appeals for recurring gifts.
- + Explain why someone should make a recurring gift instead of a one-time gift.

**Rescue Ministries**  
115 YEARS OF MID-MICHIGAN

**Help us reach our goal:**  
**Hundreds of meals and Hope & Care Packages**

**You can provide a meal and Hope & Care Packages—just \$30**

Help even more neighbors struggling to end homelessness in Mid-Michigan this holiday season. Your gift today provides a hot, nutritious meal and a Hope & Care Packages, complete with:

- Hygiene kit
- Socks and gloves
- Warm Shelter

**ONE-TIME**  
Your one-time gift will help people.

**DONATE MONTHLY** **GREATEST IMPACT**  
Become a monthly donor and your ongoing support will provide food and shelter for hungry, homeless neighbors.

#GivingTuesday

# Encourage recurring gifts

Explaining the impact of a recurring gift increases the likelihood of donors upgrading their one-time gift!

- + How does a recurring gift make a greater impact?
- + How can you show this?
  - Will donors sponsor a child? Animal?
- + What can be accomplished?
- + Show the impact!



## Give With Heart for GivingTuesday

This GivingTuesday — an international day of giving — make a lasting difference for someone who's homeless and hurting in South Central Nebraska. With every gift, you provide meals and care — a big step toward transforming lives this holiday season, especially as we continue to deal with the effects of COVID-19. Please give as generously as you can. Thank you.

# Encourage recurring gifts cont.

Make recurring gifts special and give your donors the warm fuzzies!

- + Segment your communications to current recurring donors.
- + Add special language to appeals.
- + Create a special group for recurring donors.
- + Offer incentives for recurring gifts.

GET INVOLVED

## APCH Social Change Club

Want to support A Place Called Home and stay involved all year round? Then membership in our [Social Change Club](#) is for you! For making an ongoing minimum annual or monthly donation, you will receive special benefits, free tickets to APCH events, and exciting invitations throughout the year. Have fun while doing good! **Sign up today!**



# Recurring donation appeal example

A great example of this is Helping up heroes!

- + Great impact statement and image.
- + “Helping Up Heroes” special group.
- + Explains the impact of each monthly donation amount.
- + Included special language in appeal and on CTA: “I want to be a hero.”

**BE A HERO TO THE VULNERABLE**

Helping Up Mission  
NOW IT'S UP TO US

HELPING UP HEROES

Dear Sarah,

As we start the new year, homelessness, addiction, and crippling poverty continue to ov

You understand hope ... and a

That's why I'm compassionate the hurting me

When you bec accomplish an

- \$25 a month** can provide 12 hot, nutritious meals.
- \$50 a month** can provide 5 nights of shelter.
- \$100 a month** can provide job training to help someone achieve living wage employment.
- \$250 a month** can help a devastated person break the grip of addiction and begin a new life in recovery.

**I WANT TO BE A HERO**



# Optimize donation pages and donation forms

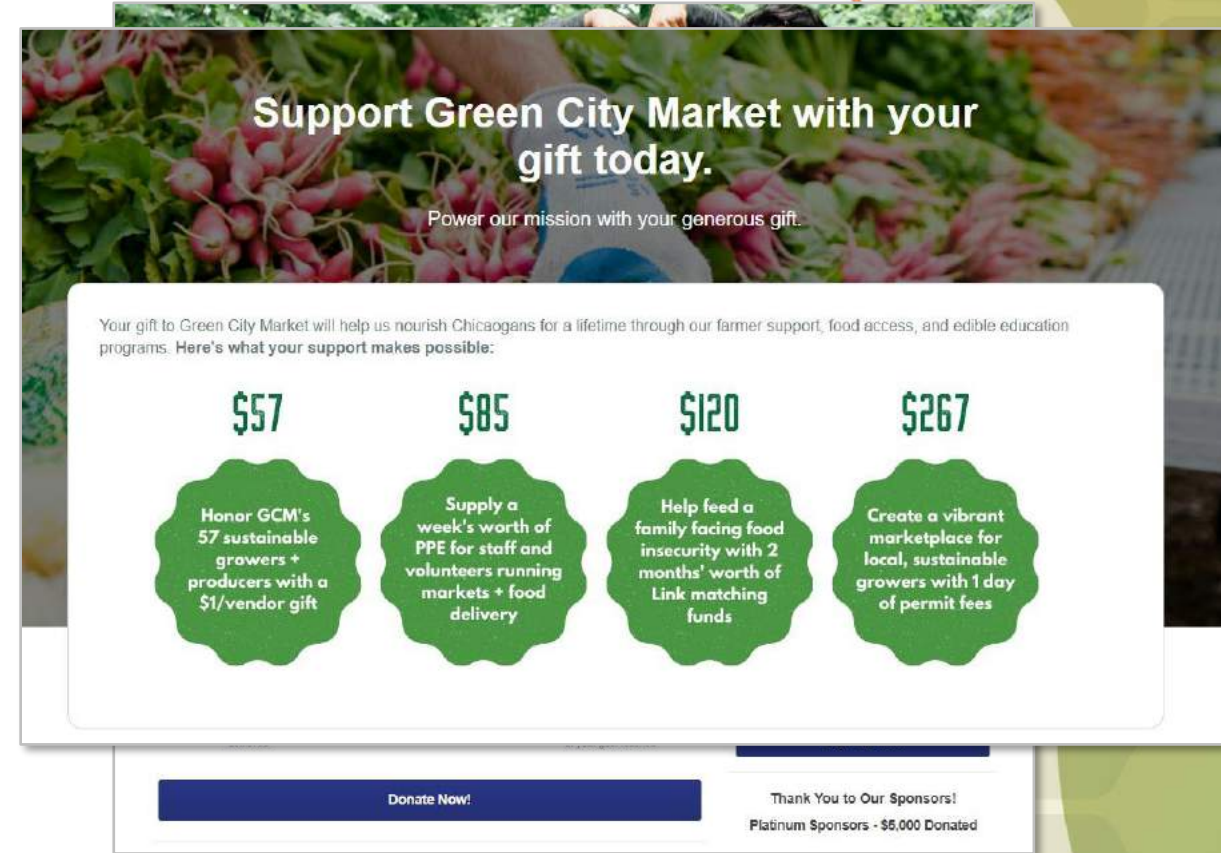
---



# Recurring gifts on donation pages

There are a multitude of design elements you can use on your donation page to suggest upgrading:

- + Create a banner image.
- + Add an impact statement for recurring gifts.
- + Eliminate distractions and choices.



# Recurring gifts on donation forms

Eliminate donor friction and make it easy to upgrade to a recurring gift!

- + Add images tied to donation amounts with brief impact statements.
- + Limit additional fields, keep the donation process streamlined.
- + Provide multiple giving frequencies.
- + Let donors set their own start and end dates.


My account • Sign out

### SELECT A GIVING LEVEL

Increase the Impact! - Your gift will be matched through February.


One Time      Ongoing

Give Monthly ▾



**SELECT**

Sponsoring a display panel helps raise awareness. \$600  
Become a Panel Sponsor for **Art Revealing the Gunfire Epidemic** exhibits on the D.C. National Mall and beyond.  
At checkout **you can dedicate a panel** to someone special to be honored or remembered on our website.



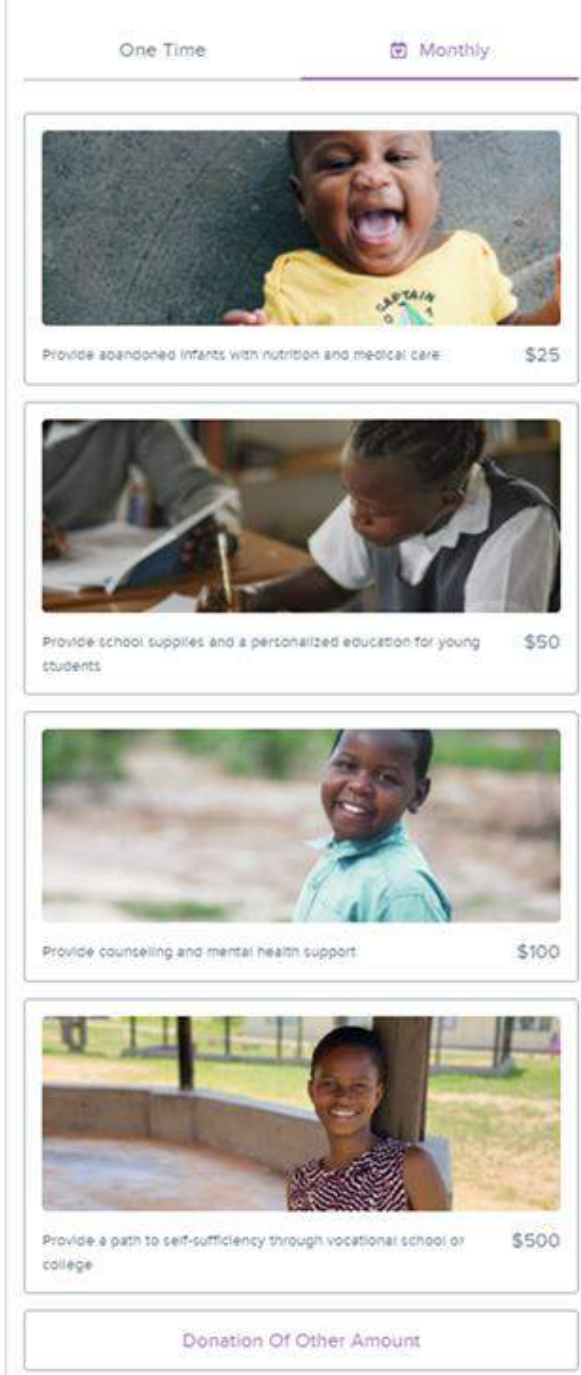
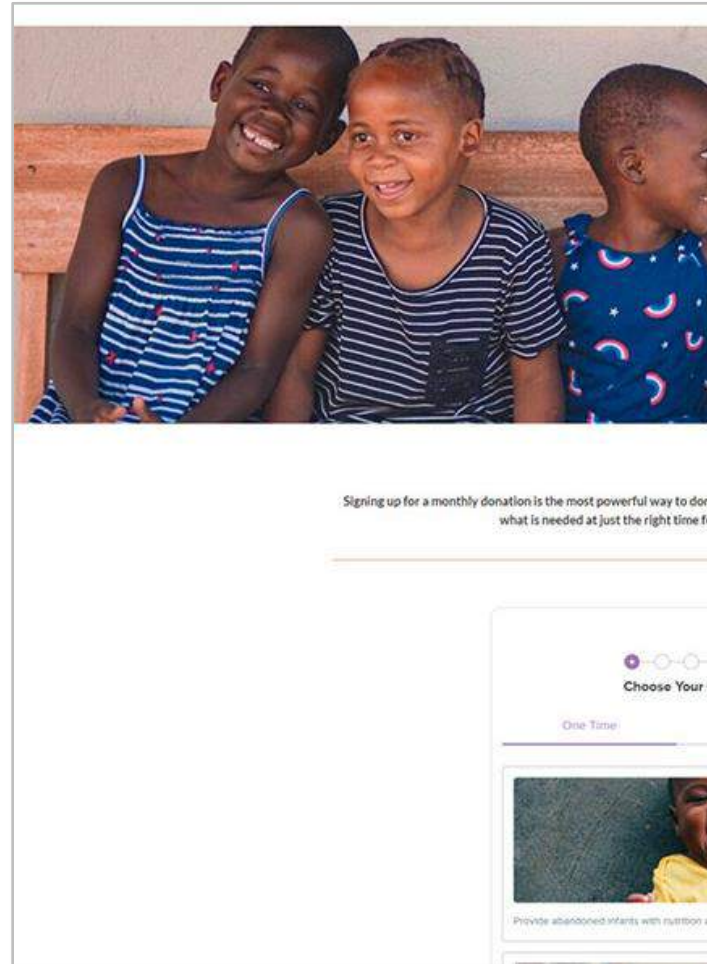
**SELECT**

Holding space for lost lives takes A LOT of space! \$300

This level could cover 20 days of storage space for 200,000 Soul Boxes representing those killed or injured by gunfire.  
**OR** it could cover the cost of our workshop at the Multnomah Arts Center for 10 days.

# Kuda Vana

- + Banner image showing who donors will be supporting.
- + Impact statement at the top of the form.
- + Donation images and text tied to specific donation amounts.
- + Explains how a monthly recurring gift has a greater impact.

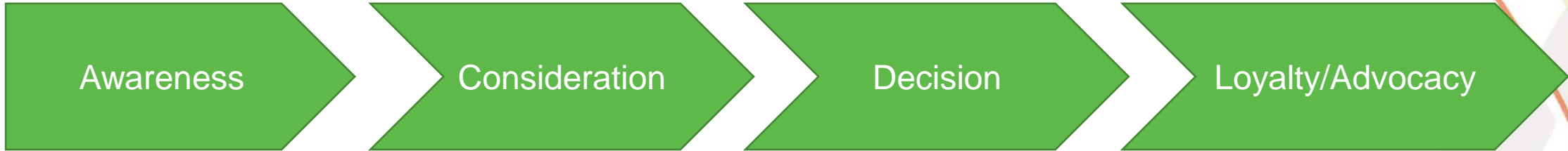




Build loyalty and inspire  
advocacy

---

# Where are we in the donor journey?



**BE A HERO TO THE VULNERABLE**

Helping Up Mission  
**HELPING UP HEROES**

Dear Sarah,

As we start the new year, homelessness, addiction, and crippling poverty continue to overwhelm many neighbors here in Greater Baltimore.

You understand the most vulnerable among us need real help ... real hope ... *and a real hero.*

That's why I'm inviting you to [join Helping Up Heroes](#). This is a compassionate group of friends who **commit to give monthly** to give the hurting men and women at Helping Up Mission a fresh start on life.

When you become a Helping Up Hero, your generous monthly gifts will accomplish amazing things.

Signing up for a monthly donation is the most powerful way to donate. It covers costs and ensures your gifts provide just what is needed at just the right time for the children in our care.

Choose Your Gift

One Time Monthly

Provide abandoned infants with nutrition and medical care \$25

Your generosity feeds families!

**Thank you for providing meals to our community's hungry families.**



During your year-end  
campaign

---

# Donation confirmation page

Create a confirmation page that continues your story and thanks your donor!

- + Set up a specific thank you page for your year-end campaign with your impact statement.
- + Add a personalized video.
- + Let them know to expect a thank you email.
- + Add social sharing so donors can easily share their donation (and your mission!).
- + Include a donation verification and your nonprofits' tax information.



Because of *you*, we're able to collect donated produce from local farmers and distribute healthy, nutritious food and fresh produce to families in need. Last month, you made it possible to deliver enough food to make **173 healthy meals** for a family of four!

Be sure to check your email -- you should have a note (full of gratitude) from us!

# Recurring donation receipts

Create specific year-end receipts with special language for donors!

- + Make it personal with a personalized salutation.
- + Include a sincere thank-you message. Be sure to personalize thank you's for one-time and recurring donors.
- + Include an impact statement and video (if you have one).
- + Tell donors how to stay involved.

Your generosity feeds families!



Thank you for providing meals to our community's hungry families.



# Mercy Ships

- + Great impact statement at the top and middle of the receipt.
- + Personalized to donor.
- + Testimonial from a constituent.
- + Added ways to keep involved.
- + Included information on matching gift programs.
- + Transaction information.



"When we came to the ship for the first time, I was just thanking God over and over. There is no gift greater than good health."

—Benessa's mother.

Thank you again for making a difference. The prayers and support of caring friends like you truly turn lives around.

We look forward to your continued support. If you'd like to do more, we offer many ways for you to help by [supporting a crew member](#), [shopping our catalog](#), or even [leaving a legacy](#).

**Many employers sponsor matching gift programs** and will match any charitable contributions or volunteer hours made by their employees. Click [here](#) to find out if your company has a matching gift policy.

Following the model of Jesus,

Don Stephens  
Founder

## Thank you for your donation!

Here are the details of the transaction for your records...

**Amount:** \$100.00

Mercy Ships EIN: 26-2414132

Transaction ID: 12345678

Date: 06/15/2021

Payment Type: Visa

**Personal Information:**

Quincy Givens

207 Bartow Rd

Lakeland, FL 33801 US

[quincygivens@example.com](mailto:quincygivens@example.com)

# Other ways to thank donors

Follow up with additional thank you messages through:

- + Social media. Post a quick update on your year-end campaign, include a picture or video, and link back to your form.
- + Give donors a quick call to show your appreciation.
- + Send a text message.





# After your year-end campaign

---

# Send an update to donors

Provide an update to donors after your year-end campaign ends. Let donors know how much you raised, if you met your goal, and how the funds will be used.

- + Emails, letters, phone calls, text message, and social media.
- + Provide ways for donors to stay involved.
- + Segment communications to different types of donors when possible.



# For new donors

This is their first time giving to your organization, make sure to give them important updates and how they can stay involved.

- + Direct new donors to places where they can find company news, volunteer opportunities, and more.
- + A welcome email series is a great way to accomplish this!



# For sustaining donors

Keep recurring donors updated on how their donation is making an impact by segmenting your communication.

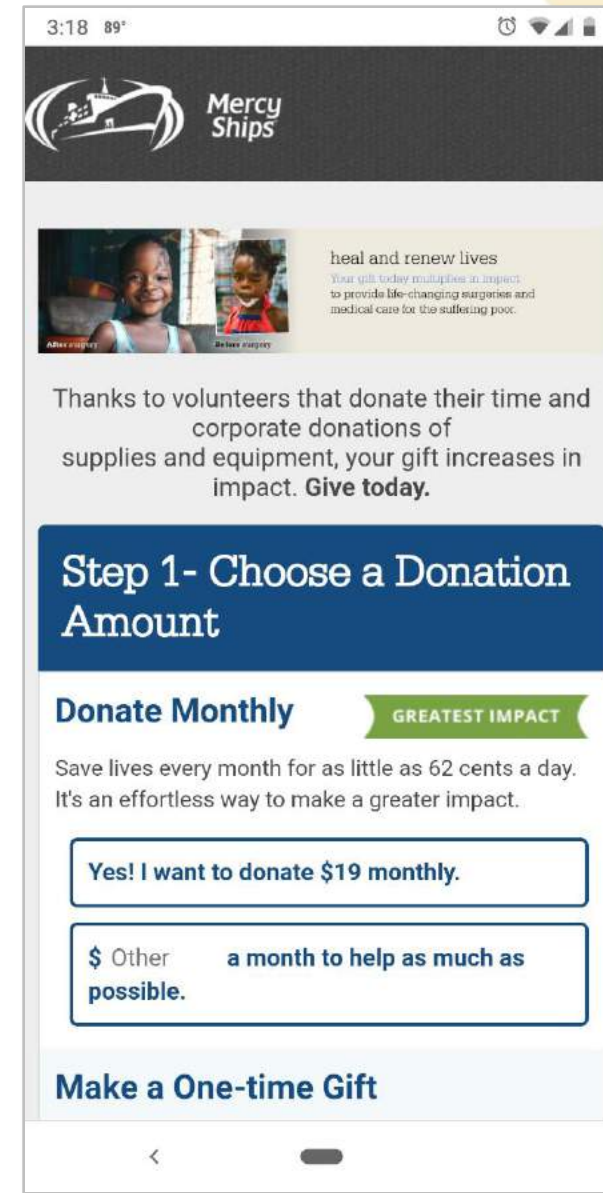
- + Send sustaining donors periodic emails telling them what they're achieving.
- + Post updates on your organization through social media.
- + Periodically ask sustaining donors to upgrade their gift amount.



# For sustaining donors contd.

A NextAfter study found that 47% of nonprofits never made an attempt to retain a recurring donor after a credit card was canceled!

- + Build an outreach plan for lapsed donors or canceled credit cards
- + In the Qgiv system, you can set up automated emails to go out to donors





# How to do this with Qgiv

---

Which Qgiv tools can I use to encourage these gifts during the holiday season?



# Qgiv's award-winning donation forms

Redesigned donation forms won the 2021 Big Innovation award!

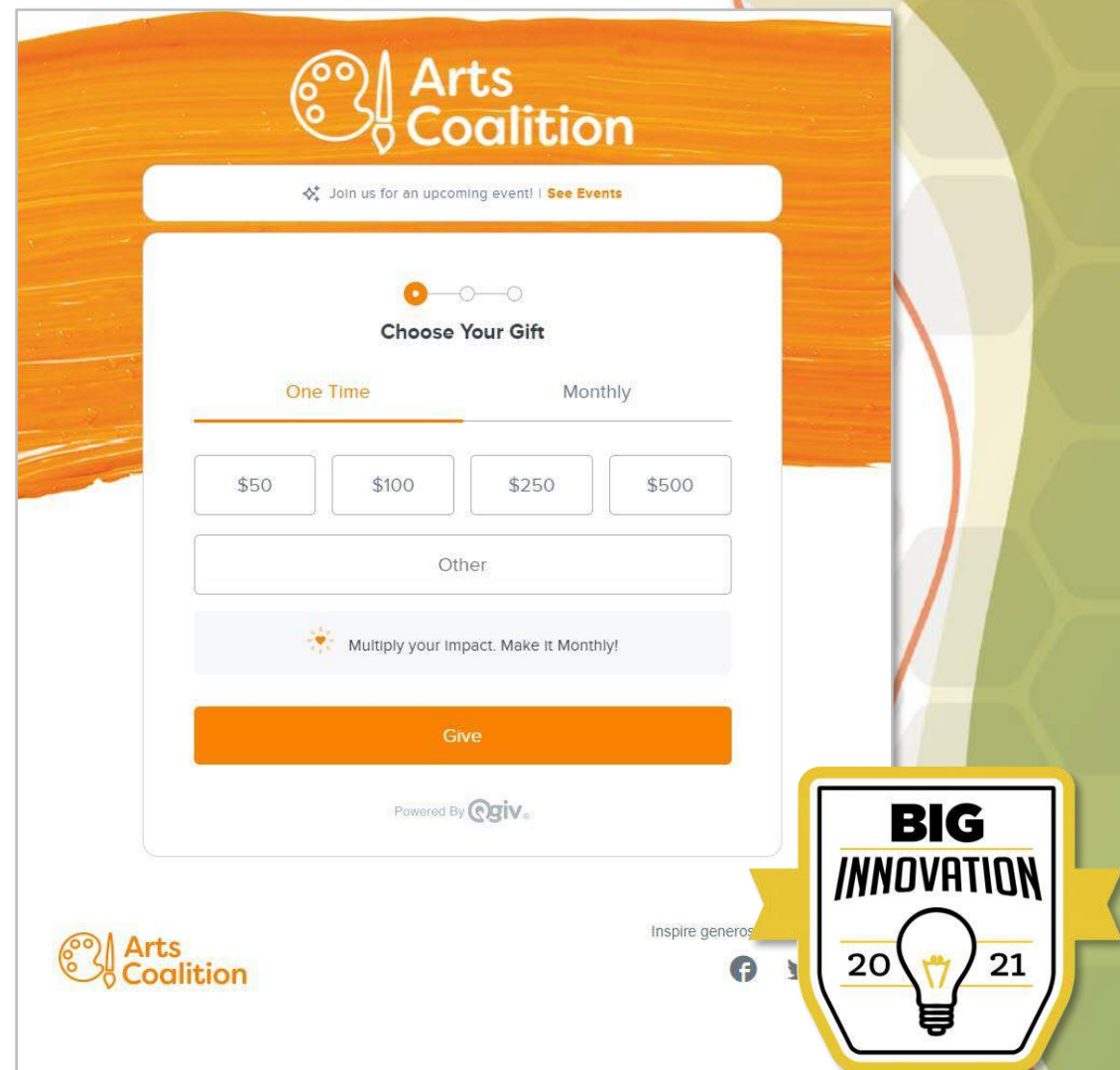
- + Improvements to the overall look and feel
- + Introduced multistep forms
- + Special emphasis was placed on recurring giving features!

**173%** Increase in recurring giving

**86%** Increase in one-time conversion rates



Higher conversion rates



# Recurring options available on multistep and single-step forms

The screenshot shows a single-step donation form for Arts Coalition. At the top, there is a navigation bar with the Arts Coalition logo and a link to "See Events". Below this is a progress indicator with three steps, the second of which is active. The main heading is "Choose Your Gift". There are two tabs: "One Time" (selected) and "Monthly". Under "One Time", there are four buttons for \$50, \$100, \$250, and \$500, and an "Other" input field. A call-to-action button says "Multiply your Impact. Make it Monthly!". At the bottom is a large orange "Give" button. The footer includes the Arts Coalition logo, the tagline "Inspire generosity. Spread the word.", and social media icons for Facebook and Twitter. It is powered by Qgiv.

The screenshot shows a multistep donation form for Arts Coalition. The title is "Choose Your Gift". There are two tabs: "One Time" and "Ongoing" (selected). Under "Ongoing", there are four buttons for \$50, \$100, \$250, and \$500, and an "Other" input field. A call-to-action button says "Multiply your impact. Make it Monthly!". Below this is the "Your Details" section, which includes: "What's your name?" with first and last name fields (filled with "Justin" and "Cook"), a checkbox for "Don't share my name publicly", "Let's get your details, Justin." with an email field (filled with "justin.cook@qgiv.com"), an address field (filled with "207 Barlow Road"), an "Apartment, Suite, Etc." field (optional), a "City" dropdown (filled with "Lakeland"), a "State" dropdown, a "Zip Code" field (filled with "33801"), a "Country" dropdown (filled with "United States"), and an "Employer" field (optional). At the bottom, there is a checkbox for "I would like to get news and updates from Arts Coalition!" (checked) and a "Payment Details" section with a note: "All transactions are secure and encrypted."

# Recurring upgrade nudge

- + The recurring upgrade nudge is present throughout the donation journey!
- + Almost all of the text on the donation form is customizable by your organization including the upgrade nudge and the “one-time” and “monthly” tabs

The screenshot shows a donation form for 'Brick at Museum'. The header is blue with the text 'Add Your Name to Brick at Museum' and 'Your gift supports our mission. Make a donation today.' Below this is a white box titled 'Choose Your Gift' with a 'Sign in' link. It features two tabs: 'One-Time Gift' (selected) and 'Monthly Donation'. Under 'One-Time Gift', there are four buttons with values: \$27, \$58.30, \$87, and \$100. Under 'Monthly Donation', there are four buttons with values: \$250, \$500, \$1,000, and \$2,500. Below these is an 'Other' input field. At the bottom, a blue button with a heart icon says 'Multiply your impact. Make it Monthly Donation!'.


# Recurring upgrade prompt


Recurring upgrade prompts are an excellent way to make one final ask before a donor completes a gift:

- + Text is customizable, so you can use this area to reiterate your recurring donation message
- + The text on the button updates to reflect the monthly donation amount
- + If donors decide they don't want to upgrade, it's easy for them to select no thanks

All transactions are secure and encrypted.

TOTAL GIFT






**Make it ongoing!**

Justin, your steady support helps us plan ahead  
and you can cancel at anytime.

**Yes! Give \$50/month!**

No thanks. Complete my one-time gift.

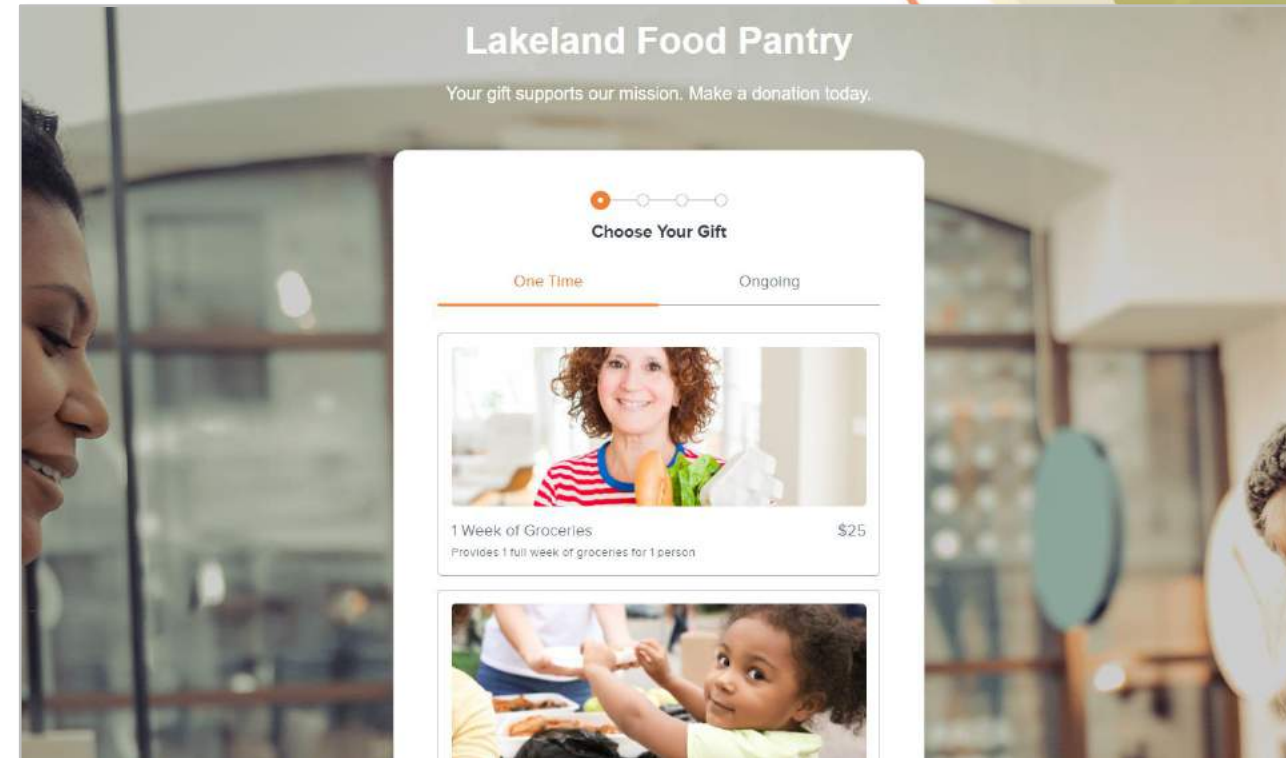
New Payment Method

 Back **Give \$50**

# Donation form and donation page

Show donors the impact of their one-time or recurring gift with:

- + Images tied to donation amounts
- + Impact statements for donation amounts
- + Customizable landing pages with your brand's colors, images, and text with a WYSIWYG editor



# How to make it easy to upgrade

- + The tabbed layout on Qgiv forms makes it easy for donors to switch between “one time” and “ongoing”
- + Multiple reminders are included throughout the donation journey to encourage upgrading!
  - Ongoing tab is present throughout the process
  - Recurring Upgrade Nudge is a subtle reminder
  - Recurring Upgrade Prompt appears at the end!

The screenshot displays a payment interface with a grey background. At the top right, there are links for 'My account' and 'Sign out'. Below this is a progress indicator with four steps, the third of which is active. A lock icon and the text 'Payment Details' are shown, followed by the assurance 'All transactions are secure and encrypted.' A modal window titled 'TOTAL GIFT' is centered on the screen. It features a heart icon and the heading 'Make it ongoing!'. The message inside reads: 'Justin, your steady support helps us plan ahead and you can cancel at anytime.' There are two buttons: a prominent orange one labeled 'Yes! Give \$50/month!' and a white one with an orange border labeled 'No thanks. Complete my one-time gift.' Below the modal, the text 'New Payment Method' is visible. At the bottom left is a 'Back' button with a left arrow, and at the bottom right is a large orange button labeled 'Give \$50'. The footer includes 'Powered By Qgiv.' and a 'digicert EV SSL SECURE' logo.

# Enabling recurring gifts

Make sure you have recurring donations turned on! Do this on Giving Tuesday forms, year end forms, annual fund forms... everywhere!

- + Enable recurring donations in your form settings
- + Set billing frequencies
- + Set default recurring frequency

Enable Recurring Donations

- One Time
- Weekly
- Every 2 Weeks
- Monthly
- Quarterly
- Semi-Annually
- Annually

Default Recurring Frequency:

One Time ▼

Enable end date for recurring donors (applicable to the donations area only)

# Building receipts in Qgiv

Building receipts in Qgiv is super easy!

+ Our “what you see is what you get” or WYSIWYG, editor makes it simple to customize reports and add conditional content based on your organizations needs!

The screenshot displays the Qgiv receipt editor interface. At the top, there is a 'Subject' field with a 'Required' label and the text 'Thank You for Your Donation!'. Below this is the 'Receipt Body' section, also with a 'Required' label. The editor features a rich text toolbar with options for Source, Insert Media, Insert Tags, and various text formatting tools (bold, italic, underline, strikethrough, text color, background color). A 'Conditional Content' dropdown menu is visible. The main editing area shows a preview of a receipt with the following text: 'Dear %Donor%,', 'Thank you for your gift of %Amount% to Lakeland Food Pantry!', and 'Your gift helps us provide hot meals to families in need. Every dollar you give provides one hot meal to a member of our community. Together, we can give people like Laura and her daughter a warm, safe place to enjoy a meal.' Below the text is a placeholder for an image, which is partially filled with a photo of a woman. To the right of the image, the text reads: 'After an accident at work left her on workman's'. At the bottom of the editor, there is a 'Tips' section stating: 'You can insert images by dragging and dropping them onto the editor. Tags (ex: %Donor%) will be populated once the email is sent.' and a toggle switch for 'Include PDF Receipt' which is currently turned on.



# Recurring gift receipts

Use the receipting tool to create receipts that will knock their socks off

- + Create **special receipts** for recurring donors
- + Add **conditional content** that makes donors feel special
- + Add **photos and links** that show donors their impact
- + **Update these periodically** so they don't get stale


Your generosity feeds families.

**Thank you for providing meals to our community's hungry families.**

Dear %Donor%,

Thank you for your gift of %Amount% to Lakeland Food Pantry!

Your gift helps us provide hot meals to families in need. Every dollar you give provides one hot meal to a member of our community. Together, we can give people like Laura and her daughter a warm, safe place to enjoy a meal.



After an accident at work left her on workman's comp, Laura walked in our door on crutches and left with a box of groceries to keep her family fed.

# Retain, cultivate, and wow recurring donors

Create specialized content that goes exclusively to different donors

- + **Pull lists** of new and recurring donors
- + Use a **CRM integration** or **email integration** to target donors
- + **Mention how their support** has impacted your organization in future appeals
- + **Thank them** and send them regular updates





How to raise even more!

---

# Use Recurring Giving in Text Fundraising

It's easy for donors to set up a recurring gift via text!

- + Set your keyword for your donation form
- + Donors text the short code and indicate how much they want to give
- + They land on a shortened version of your donation form that includes your recurring options!

A screenshot of a mobile donation form titled "Text to Give". The form is titled "Choose Your Gift" and has two tabs: "One Time" and "Ongoing", with "Ongoing" selected. Under the "Give Monthly" dropdown, there are four buttons for donation amounts: "\$50", "\$100" (which is highlighted), "\$250", and "\$500". Below these is an "Other" input field. A message reads: "Thanks for considering making your donation Monthly! Your gift starts today. Cancel anytime." with a "Change" link. At the bottom, there is a large orange button that says "Give \$100/month". The form is powered by "Qgiv".

# Enable Recurring Gifts on Your Peer-to-Peer Form

Donors can make recurring gifts during a peer-to-peer event, too! This is a great option for:

- + Giving Tuesday campaigns
- + Racing events
- + Board campaigns
- + DIY Fundraising events
- + Anything really 😊



## Sponsor a child

A simple donation of \$38 a month helps bring an education to inner city kids of San Francisco.

[SPONSOR NOW](#)



# That Was So Much Info

---

Yeah, we know. Here are some takeaways.

# Today's Big Takeaways



- + Recurring donors give 5.4x more than one-time donors
- + Recurring donors have a 90% retention rate



- + When building your year-end forms, be sure you enable recurring options
- + Create specific asks recurring gifts and reinforce them on your form



- + Thank your donors and tell them how to stay involved!
- + Then, use reports and integrations to cultivate and retain those donors

Want to talk to us about using Qgiv? Email [contactus@qgiv.com](mailto:contactus@qgiv.com)

Are you a Qgiv customer? Email [support@qgiv.com](mailto:support@qgiv.com)

Have questions about best practices? Check out [qgiv.com/blog](http://qgiv.com/blog)!



Questions?

---