

# Your Monthly Giving Audit: AI Prompts to Build EOY Growth Before Traffic Hits

with Dana Snyder  
Founder, Positive Equation



# CharityEngine: A Unified Fundraising Platform and Nonprofit CRM



- ✓ Complete donor view in real time
- ✓ One system your team loves to use
- ✓ Board reports are ready in minutes
- ✓ Decisions powered by reliable data
- ✓ Privately owned and self-funded

## A GENERATIONAL SHIFT

# The way we use fundraising software is changing.

### YESTERDAY

Learn menus, reports, dashboards and filters.



### TODAY

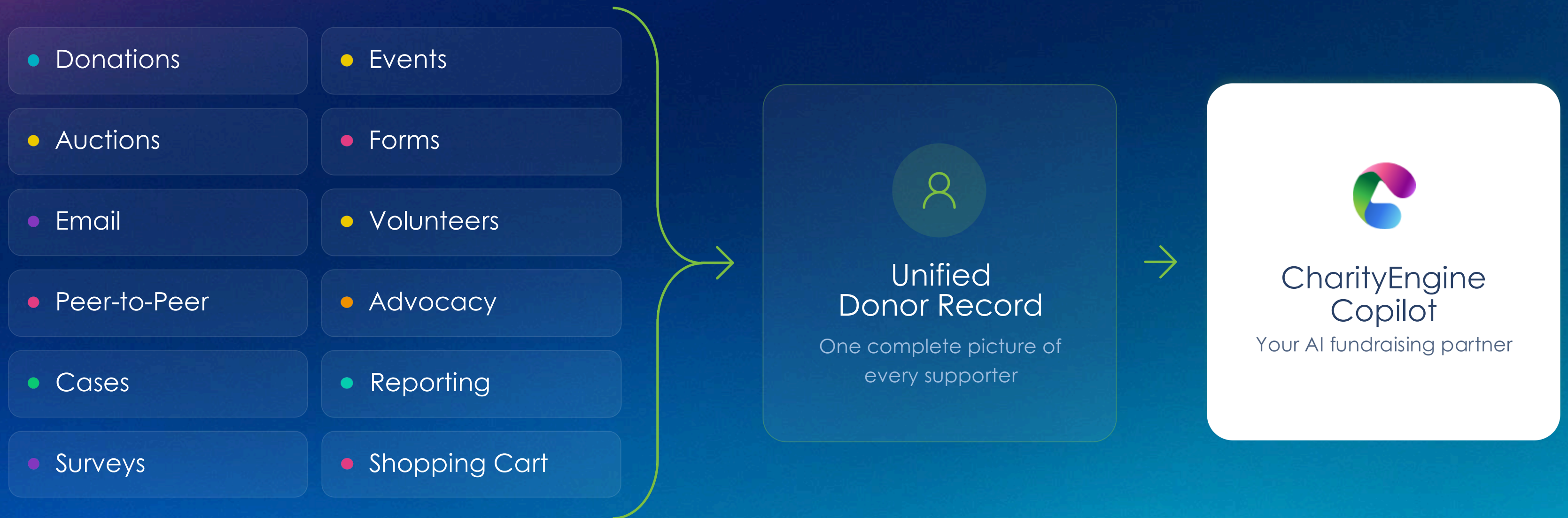


## Just ask.

-  "Build my board report."
-  "What should I know before meeting Mary?"
-  "Which recurring donors are at risk?"

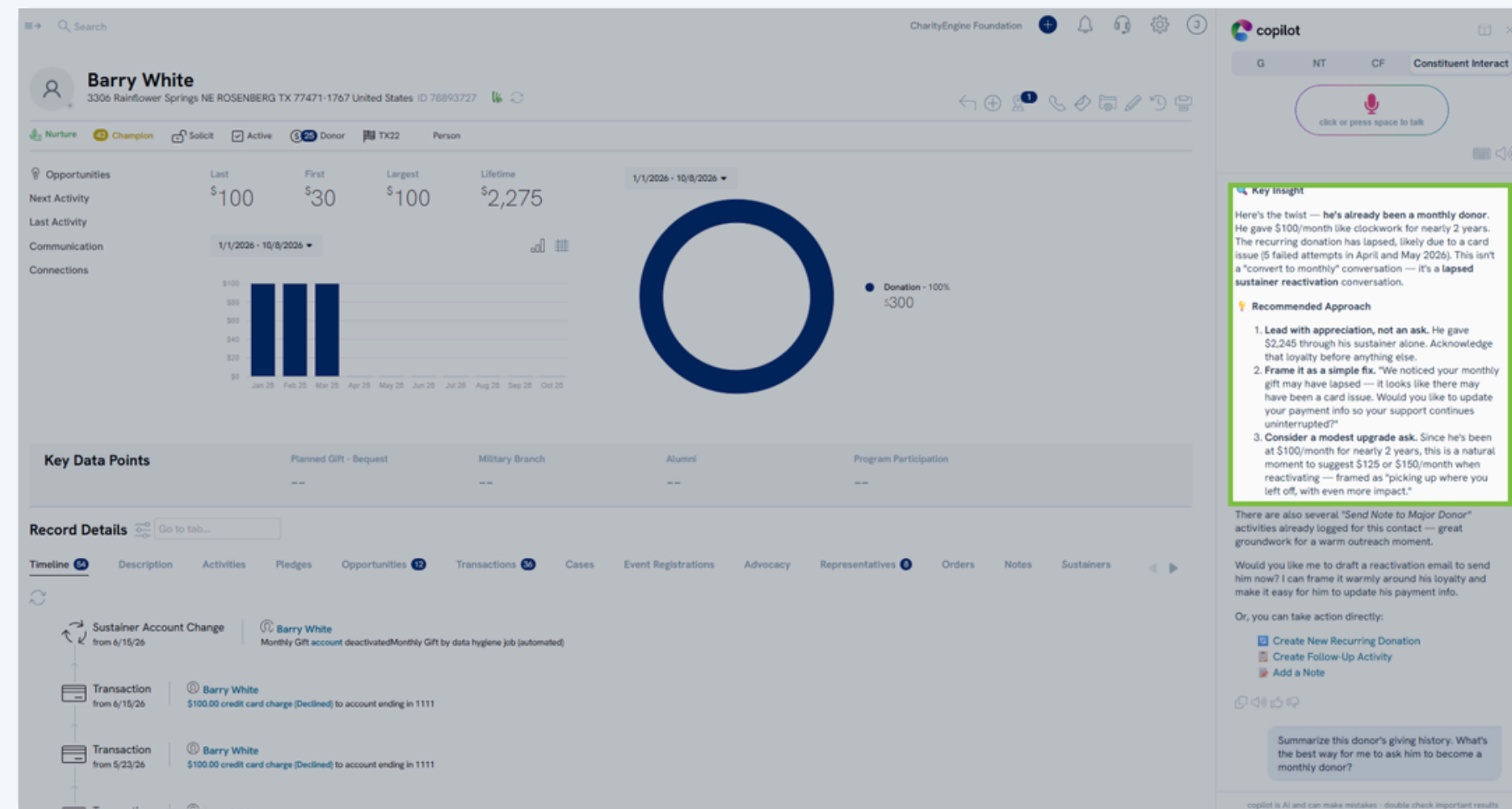
# One record. Every interaction. Smarter AI.

Every module is built in —and feeds one unified donor record.



# Prepare for a conversation with a monthly donor prospect

"Summarize this donor's giving history. What's the best way to ask him to become a monthly donor?"



**1 Corrects the premise**  
He's a lapsed sustainer, not a new prospect.

**2 Recommends an approach**  
Lead with thanks; frame the fix as simple.


**Key Insight**

**1** Here's the twist — he's already been a monthly donor. He gave \$100/month like clockwork for nearly 2 years. The recurring donation has lapsed, likely due to a card issue (5 failed attempts in April and May 2026). This isn't a "convert to monthly" conversation — it's a **lapsed sustainer reactivation** conversation.

**2**  **Recommended Approach**

1. **Lead with appreciation, not an ask.** He gave \$2,245 through his sustainer alone. Acknowledge that loyalty before anything else.
2. **Frame it as a simple fix.** "We noticed your monthly gift may have lapsed — it looks like there may have been a card issue. Would you like to update your payment info so your support continues uninterrupted?"
3. **Consider a modest upgrade ask.** Since he's been at \$100/month for nearly 2 years, this is a natural moment to suggest \$125 or \$150/month when reactivating — framed as "picking up where you left off, with even more impact."

# Identify upgrade opportunities among sustainers

"Where do I have upgrade opportunities among current monthly donors?"

Search

CharityEngine Foundation

+

🔔

🔊

⚙️

👤

Contacts

▼ X Sustainer Monthly Gift

Search

Show

Type

Active

Status

Priority

Dates

all

Person

yes

no

All

Search

| Details                                                                                                                                                                                                                                                                       | State         | History                                                                                                                                                                                                                                                        | Source | Date      |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|-----------|
| <div><div>Details</div><div>Magnolia Piel</div><div>Id: 80534609</div><div>Maggie.Piel@gmail.com</div><div>📧</div><div>📍</div><div>📅</div></div>                                                                                                                              |               | <div>Lifetime Total: \$0.00</div> <div>📅 Giving History</div>                                                                                                                                                                                                  |        | 12/2/2024 |
| <div><div>Details</div><div>Mark Kudrow</div><div>Id: 81777077</div><div>📧</div><div>📍</div><div>📅</div></div>                                                                                                                                                                |               | <div>Lifetime Total: \$0.00</div> <div>📅 Giving History</div>                                                                                                                                                                                                  |        | 4/17/2025 |
| <div><div>Details</div><div>Jenny Helms</div><div>Id: 65592558</div><div>Solicitor: Nancy Andrews-Solicitor</div><div>member of The Morikawa Family</div><div>7652 mail st</div><div>Duluth, GA 30097</div><div>United States</div><div>📧</div><div>📍</div><div>📅</div></div> | Status: Donor | <div>Lifetime Total: \$506.00</div> <div>App: Data Import</div> <div>Most Recent: 2/2/2023</div> <div>Highest: \$50.00</div> <div>First: 3/2/2021</div> <div>Last Mail Date: 10/3/2024</div> <div>Last Email Date: 5/11/2026</div> <div>📅 Giving History</div> |        | 2/16/2023 |
| <div><div>Details</div><div>Michelle L Fox</div><div>Id: 65592564</div><div>8200 gb road</div><div>McLean, VA 22102</div><div>United States</div><div>📧</div><div>📍</div><div>📅</div></div>                                                                                   | Status: Donor | <div>Lifetime Total: \$120.00</div> <div>App: Data Import</div> <div>Most Recent: 2/5/2023</div> <div>Highest: \$10.00</div> <div>First: 3/5/2022</div> <div>Last Mail Date: 10/3/2024</div> <div>Last Email Date: 5/11/2026</div> <div>📅 Giving History</div> |        | 2/16/2023 |

copilot

G

Report Builder

CF

click or press space to talk

Here's your fresh report of current monthly donors who are good upgrade candidates! Here's what I've applied:

- **Sustainer = Monthly Gift** — Filters to active monthly recurring donors only.
- **Active = Yes** — Limits to currently active contacts.
- **Gift Probability Min = 60%** — Surfaces sustainers with a high predicted likelihood of giving more, making them strong upgrade candidates.
- **Sort By: Gift Probability (Descending)** — Ranks your sustainers from highest to lowest predicted gift probability, putting your warmest upgrade prospects at the top.

These are your monthly donors most likely to respond positively to an upgrade ask. Ready to take action?

📧 Send an Upgrade Ask

➕ Add to a Group

🏷️ Tag These Contacts

👤 Assign a Solicitor

💾 Save This Report

If you'd like to refine further — for example, raising the probability threshold to 75%+ for only the very warmest prospects, or adding a minimum giving amount — just let me know!

Create a new report. Where do I have upgrade opportunities among current monthly donors?

1 Starts with sustainers

Active monthly donors only.

2 Sets a probability floor

60%+ predicted gift probability.

3 Ready for an upgrade ask

Send an ask, tag, or assign a solicitor.

Here's your fresh report of current monthly donors who are good upgrade candidates! Here's what I've applied:

1

- **Sustainer = Monthly Gift** — Filters to active monthly recurring donors only.
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2

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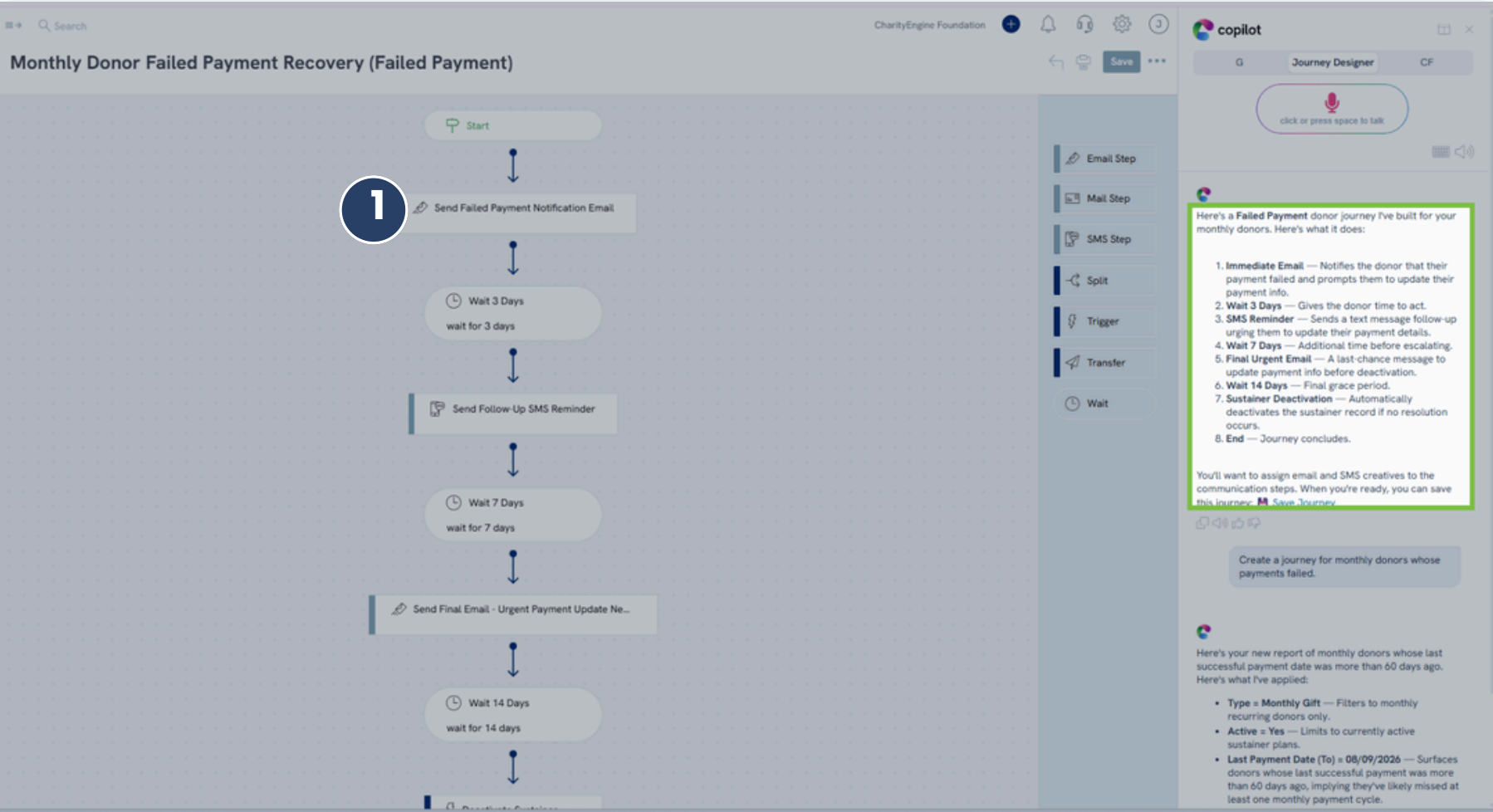
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👤 Assign a Solicitor

💾 Save This Report

# Automate failed payment recovery

"Create a journey for monthly donors whose payments failed."



## 1 Builds the whole journey

Email, SMS, and waits on the canvas.

## 2 Spaces the touches

Day 0, 3, 10, and 24, then deactivation.

## 3 Leaves staff in control

Assign creatives, adjust, then save.

2

Here's a **Failed Payment** donor journey I've built for your monthly donors. Here's what it does:

- Immediate Email** — Notifies the donor that their payment failed and prompts them to update their payment info.
- Wait 3 Days** — Gives the donor time to act.
- SMS Reminder** — Sends a text message follow-up urging them to update their payment details.
- Wait 7 Days** — Additional time before escalating.
- Final Urgent Email** — A last-chance message to update payment info before deactivation.
- Wait 14 Days** — Final grace period.
- Sustainer Deactivation** — Automatically deactivates the sustainer record if no resolution occurs.
- End** — Journey concludes.

You'll want to assign email and SMS creatives to the communication steps. When you're ready, you can save this journey:  **Save Journey**

3

You'll want to assign email and SMS creatives to the communication steps. When you're ready, you can save this journey:  **Save Journey**

THE HONEST QUESTION

**What would it mean to start January with**  
*recurring revenue already committed?*

**CHAT** Tell me what that would mean for your organization.

DO YOU KNOW YOUR LTV?

# Start with your number

Fill out the **Monthly Donor Lifetime Value Calculator** in the chat right now. Average monthly gift, number of monthly donors, retention rate.

→ keep that number in your head all session

 **Let's calculate your monthly donor value.**  
Don't know your retention yet? Use a benchmark — you can adjust later.

Average monthly gift (\$)

\$ 25

Current number of monthly donors

100

Annual retention rate

65% 80% 100%

Average donor lifespan (months)

60

If you enter a lifespan, it will be used for your LTV calculation. Otherwise, we'll estimate it from your retention rate.

Use nonprofit benchmarks

These are a starting point. Update them anytime.

**Calculate My LTV** >

## AGENDA

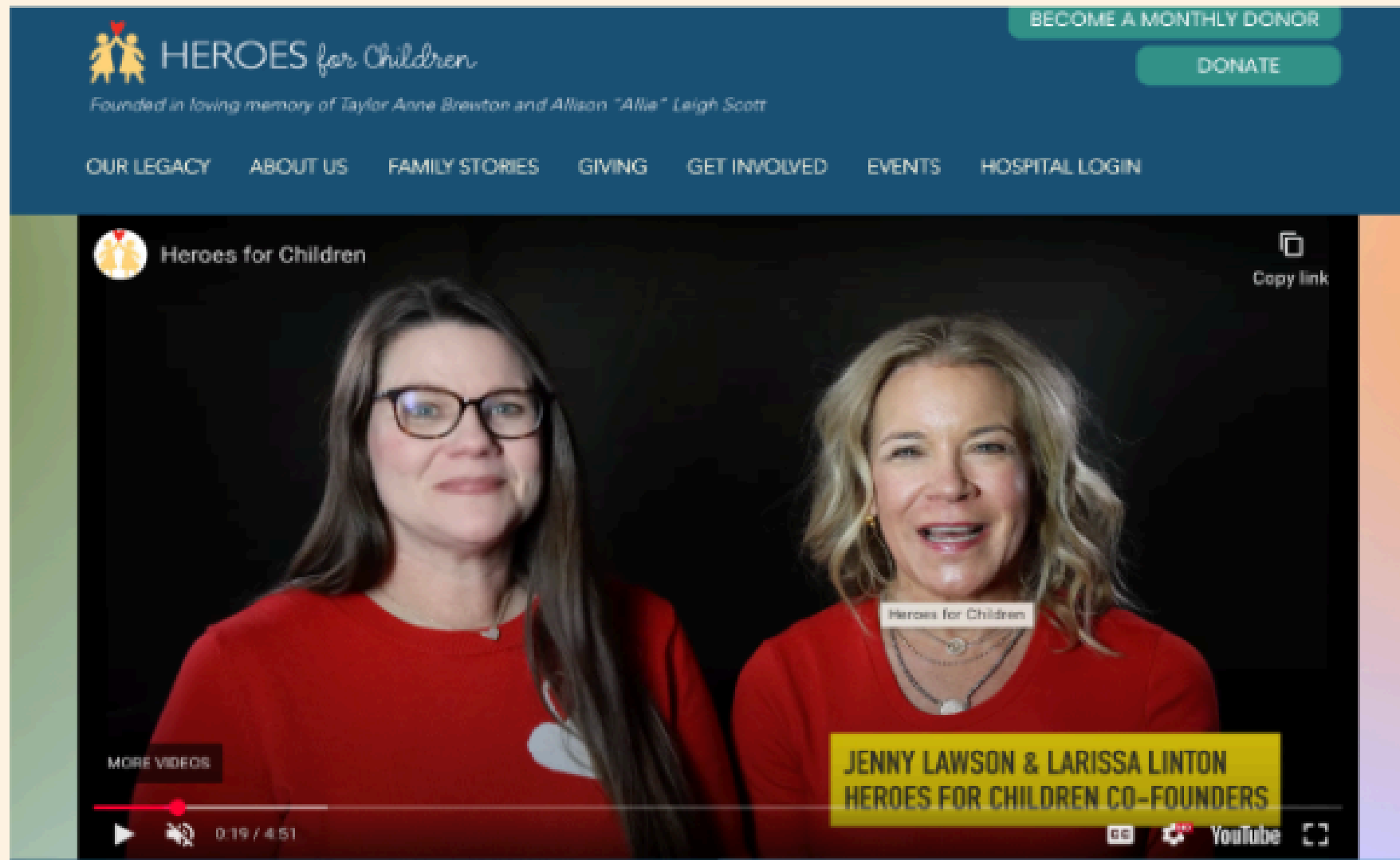
# How today works

**1** I'll show you the **5-step framework** + examples from peers

**2** You'll get **working time**, start building today

**3** At the end, I'll show you **how to finish prep for EOY**

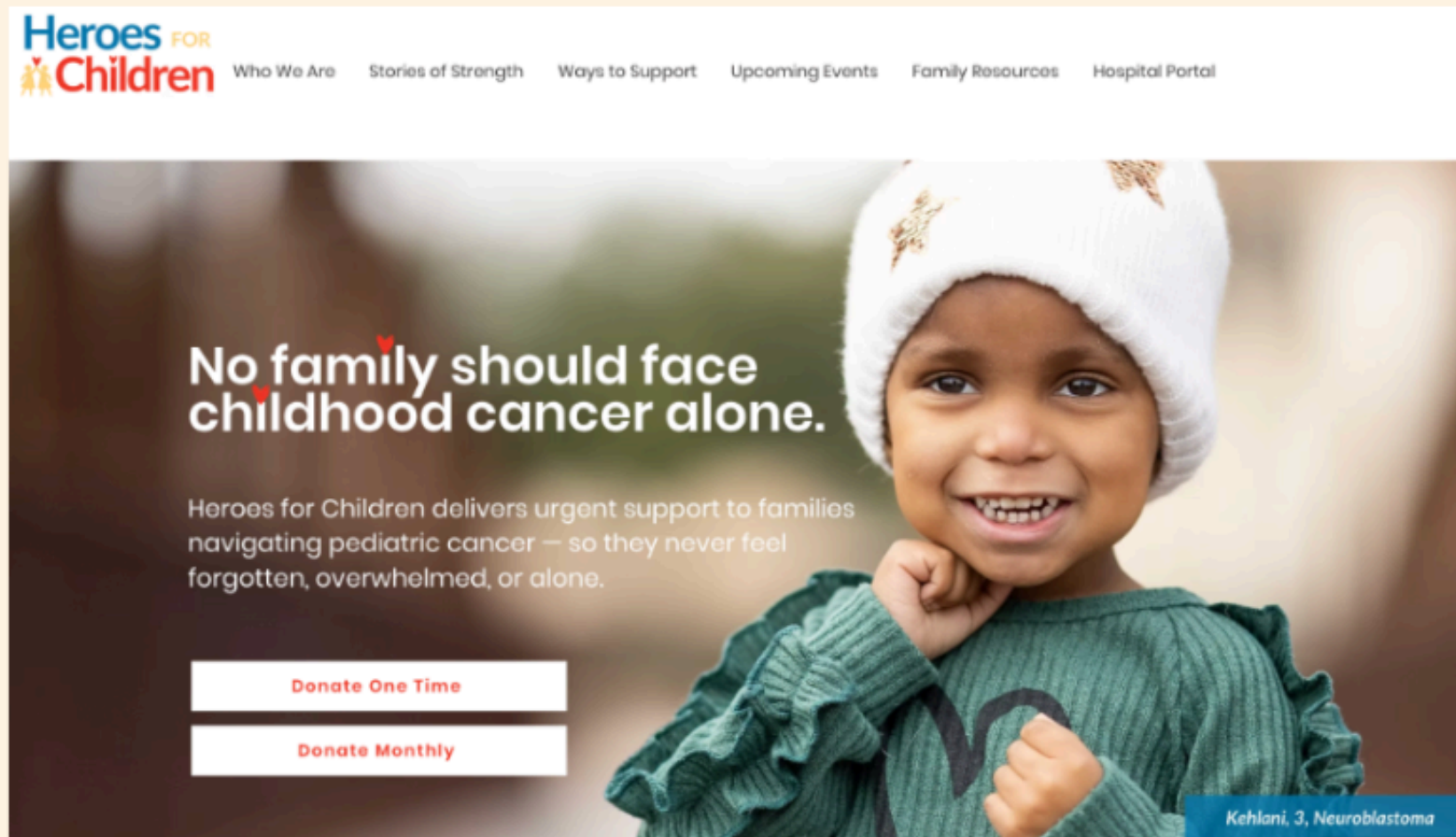
*Ready to get started?*



## WHY THIS MATTERS

# Heroes for Children

- May 2025:
  - 15 monthly donors | Less than \$1k MRR



## WHY THIS MATTERS

# Heroes for Children

- May 2025:
  - 15 monthly donors | Less than \$1k MRR
- May 2026:
  - \$7,000 MRR
  - Avg gift \$74/m
  - Retention rate 94%
  - Recurring giving 25.4%
- **Complete website rebrand**
- **Believer-driven copy**
- **Focus on the recurring ask**



HELLO!

# Dana Snyder

- **Founder**, Positive Equation
- **Author**, The Monthly Giving Mastermind
- **Host**, Missions to Movements Podcast
- **Monthly donor** to multiple organizations

*I know what it feels like to want to give this way. That's why I help nonprofits build the system to earn it.*

“

*While the nonprofit sector often celebrates the big wins with major gifts, it's time to shine a spotlight on the **humble, consistent contributions** that, over time, can build a robust and resilient organization.*

— Dana Snyder · The Monthly Giving Mastermind

## THE REFRAME

Monthly donors give at EOY too — and often *more*.

**Your monthly giving program  
doesn't compete with EOY.**  
*It powers it.*

A committed partner you're inviting to do more is a different conversation than a prospect you're trying to convert. The organizations walking into Q4 with a strong program aren't splitting their focus — **they're amplifying it.**

SIT WITH THIS

# Is monthly giving at the forefront of how your organization *asks*?

Not an option buried on your donation page. Not something you mention once a year. **The primary invitation.**

**CHAT** Yes, no, or working on it? is monthly giving currently the primary way you invite people to give?

LET'S NAME THEM OUT LOUD

# The fears worth naming

“ *What if monthly giving cannibalizes my EOY one-time gifts?*

“ *What if monthly donors don't give additionally at EOY?*

“

“

LET'S NAME THEM OUT LOUD

# The fears worth naming

“ *What if monthly giving cannibalizes my EOY one-time gifts?* ”

“ *What if monthly donors don't give additionally at EOY?* ”

“ *Is this really the right time to build something new?* ”

“ *I already have so much going on. Can I actually do this right now?* ”

## Where this room is starting from

**A**

Haven't started yet

**B**

Have a program needs work

**C**

Thought about it  
haven't built it

**D**

Started, but  
it stalled

If you're at zero right now, what you're about to see isn't something you'll need later.  
It's your starting line.

## THE ARCHITECTURE BEHIND THE BUILDER

# The 5-step framework

Today we go deep on **Steps 1–3** — the foundation.  
Steps 4 & 5 live inside the full builder.

### STEP 1

#### Create the Product

Name your program.  
Build its identity.

### STEP 2

#### Make It Easy

Optimize donor  
experience and  
giving tiers.

### STEP 3

#### Call in the Believers

Define your audience.  
Write your landing  
page.

### STEP 4

#### Make the Ask

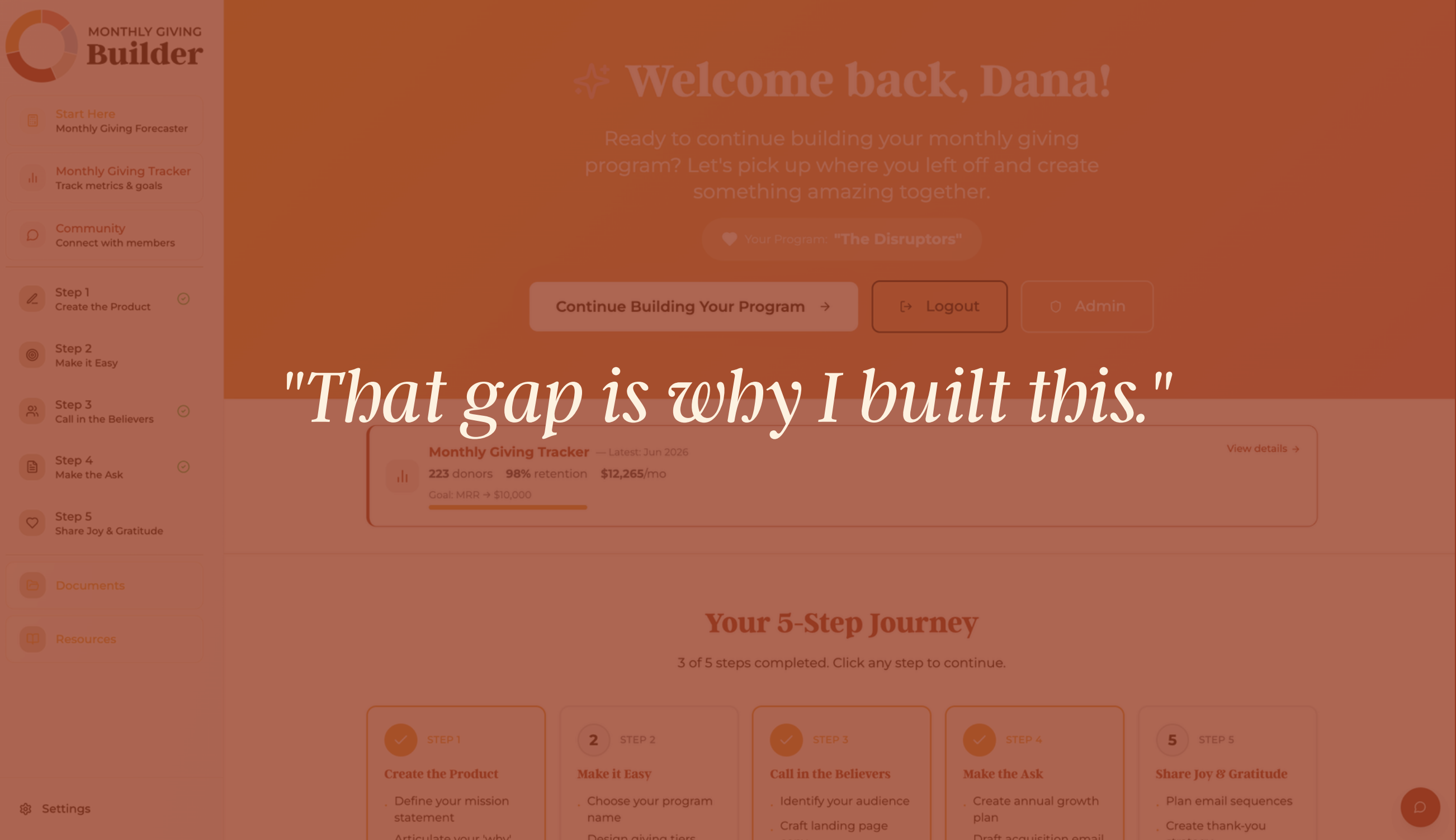
Growth plan,  
evergreen audit,  
email series.

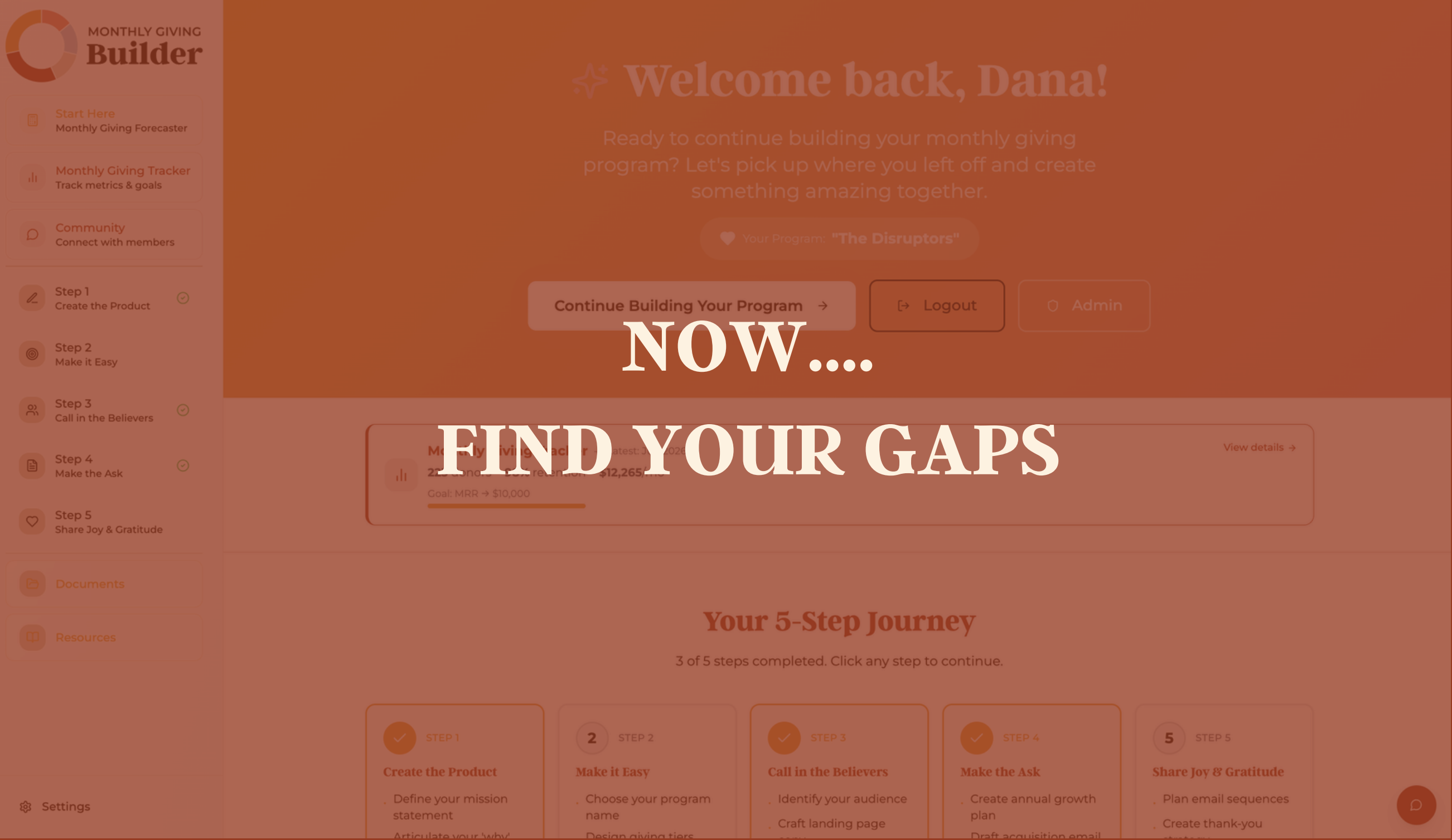
### STEP 5

#### Share Joy & Gratitude

Build your retention  
system.

*Get the foundation right and everything downstream finally converts.*





THE NEXT 20 MINUTES

Let me show you the builder. *Then  
we work on yours.*

## STEP 1

# Create the product

Answer questions about your mission, community, and brand — the builder generates your program name, mission statement, community vision, and why statement.

**The output is a board-ready strategy PDF — something that already exists, not a concept.**

### Step 1: Create the Product



#### Define Your Program Identity

Create a compelling monthly giving program that resonates with your supporters. We'll help you craft your mission, identify your audience, and generate the perfect program name.

[Learn what you'll create in this step \(click to expand\)](#)

1

#### Your Mission & Community

What does your organization do?

We're on a mission to support survivors of sex trafficking. For many survivors, the crisis doesn't end when they get out. Rent is due. A car breaks down. A hotel room runs out. A child gets sick. Without flexible emergency funds, survivors are at high risk of re-exploitation, homelessness, or returning to unsafe environments. Emergency Funds for Survivors exists for these moments.

We listen to what survivors say they need, move quickly, and help cover urgent costs up to 300 dollars per request so they can take their next step in safety and with dignity.

*Tip: Focus on the impact, not just the activity*

What do you want monthly donors to feel by joining?

Emergencies don't schedule themselves, they happen on Tuesday nights, during school pickup, between paychecks, in the middle of winter.

When you become a monthly Disruptor, you join the inner circle of people who make sure Emergency Funds for Survivors is ready before the phone rings.

Your steady support means we can say "yes" quickly when a survivor needs help with a safe place to sleep, groceries for the week, a bus ticket away from danger, or a deposit that keeps a family housed.

#### Your Progress

- ☒ Mission defined
- ☒ Org size selected
- ☐ Brand themes
- ☒ Generate names

#### MINDSET SHIFT

Think of your monthly giving program as a **UNIQUE PRODUCT**, not just a donation option. It needs its own identity, benefits, and community.

#### Quick Tips

**Be specific:** Instead of 'help people,' say 'provide meals to homeless families'

**Think feeling:** How should donors feel when they give monthly?

**Brand matters:** Your visual themes will influence your program name

#### Naming Philosophy:

*"A name creates recognition, trust, and community. Sometimes the best ideas come right from your community. Giving your program a name gives you the ability to build a*

**YOUR TURN**

**STEP 1 • 90 SECONDS**

**What does your organization do — and what do you want a monthly donor to *feel* when they join?**

Not the polished version. The real one — the answer you'd say to a friend. This is what the builder uses to generate your program name.

**CHAT** What do you want a monthly donor to feel when they join?

YOUR TURN

STEP 1 • NAME YOUR PROGRAM

What would you name your program if it had to sound like an *invitation*, not a product?

Think community, belonging, identity — not “monthly giving fund.”

The Grove

Community Table

The Cocoon

The Good Mews Crew

— real programs, real members

## STEP 2

# Make it easy

The donor-experience audit most organizations skip. Surface the friction, the gaps, the moments people drop off.

**“\$22 provides one week of family groceries” — impact amounts, not dollar amounts.**

**Make It Easy**

Even the best monthly giving program won't grow if it's hard to join. This step focuses on improving the donor experience — removing friction and making giving feel simple, intuitive, and aligned with how people actually give today.

Learn what you'll create in this step (click to expand)

**What You'll Do**

- Walk through your current donation experience
- Identify friction points in your giving flow
- Set up monthly giving amounts that inspire action

**What You'll Receive**

- A donor experience audit with recommendations
- Actionable steps to reduce friction
- Monthly giving tiers aligned with your mission

**Let's Get Started** ✨  
Walk through your donor experience and set up compelling monthly giving amounts.

1 ⚡ **Donor Experience Audit**

Donation Platform

Select your donation platform

CRM/Database

Select your CRM

Website URL

https://yourorganization.org

Start My Tech Audit

 **Charity**Engine

**YOUR TURN**

STEP 2 • OPEN YOUR OWN SITE

## When your monthly giving program is running well, what does a first-time monthly donor's experience look like

From the moment they click 'give' to the moment they get their first welcome message?

**CHAT** What's the ONE thing you want a first-time monthly donor to feel the moment they complete their gift?

**YOUR TURN**

STEP 2 • WRITE YOUR TIERS

**What does each amount actually *do* for someone you serve?**

**\$10**

/mo

*“\$10/month provides...”*

**\$25**

/mo

*“\$25/month provides three hot meals  
a week...”*

**\$50**

/mo

*“\$50/month trains one community  
health worker...”*

Write them down now. You'll paste them straight into the builder.

FROM THE BLOOMERANG GIVING SIGNALS REPORT

# Are we talking about what they *did* — or who they *are*?

## WHAT THEY DID

*“You gave \$50 last year. Give again this year.”*

Transactional. It matters — but it asks for a transaction.

## WHO THEY ARE

*“Become a member of The Grove.”*

An identity. They don't give — they belong.

**The same is true for *you*.**

## STEP 3

# Call in the believers

Describe your super fans — the people who already believe and just need a clear invitation to make it recurring. Then generate your landing page in your own voice.

Headline · subheadline · above-form copy  
· body · benefits · social proof · call to action.

### Step 3: Call in the Believers



#### Invite Them In

Create compelling messaging that invites donors into your monthly giving community, and identify aligned partners who can help you grow your reach.

 [Learn what you'll create in this step \(click to expand\)](#)

#### What You'll Do

-  Define your target audience and believers
-  Shape your message, tone, and call to action
-  Identify values-aligned partnership opportunities

#### What You'll Receive

-  Draft copy for your monthly giving landing page
-  Partner recommendations (podcasts, press, creators)
-  A clearer path to visibility and growth

1

#### Define Your Believers

Who are your super fans? The people who already believe in your mission.

 Who are your super fans? Your believers? 

people who want to support survivors in their independence to start new lives, to give them hope and joy and a head start. That know the power of \$300 and knowing that there's a community behind it makes all the difference. They're always there.

2

#### Craft Your Monthly Giving Landing Page

Generate personalized landing page copy using answers from Steps 1, 2, and 3

 [Generate My Landing Page Copy](#)

**YOUR TURN**

STEP 3 · YOUR SUPER FAN

## Who is your monthly giving *super fan*?

Describe them by what they BELIEVE -- not their demographics. What do they already show up for? What do they want to feel when they give?

**CHAT** In one sentence: who is your super fan and what do they believe?

YOUR TURN

STEP 3 · THE IDENTITY INVITATION

Finish the sentence —

**“When you become a monthly donor, you become**  
”

\_\_\_\_\_

Not “someone who helps us.” Who do they *become*? This belongs in the first line of your landing page.

WHERE YOUR FOUNDATION GOES NEXT

## Steps 4 & 5 build on what you just wrote

### STEP 4

#### **Make the Ask**

Your growth calendar

An evergreen audit of existing touchpoints

A four-part donor email acquisition series

### STEP 5

#### **Share Joy & Gratitude**

Your welcome series

Your monthly touchpoints

A 12-month retention calendar

*You have the foundation. This is where it becomes a program that runs.*

TWENTY MINUTES AGO YOU DIDN'T HAVE THIS

# Look what you just built

## STEP 1

A program direction

## STEP 2

Impact-language tiers

## STEP 3

A super fan you can name

## STEP 3

A first landing-page line

**CHAT** What was the most useful thing you built in the last 20 minutes?

RACHEL'S JANUARY

# Back to zero.

A strong EOY campaign — and then January 1st starts from scratch. Every dollar has to be re-earned. Again.

MORGAN'S JANUARY

# Already building.

Same EOY campaign — but a baseline of recurring revenue already committed. She built the foundation before she needed it.

*You just started building yours.*

# YOU PICK

Recurring-First

- **DEFAULT YOUR DONATION PAGE TO MONTHLY.** ONE-TIME BECOMES THE SECOND OPTION, NOT THE FIRST.
- **CHANGE THE ASK COPY ITSELF.** NOT "GIVE BEFORE YEAR-END." BUT "JOIN BEFORE YEAR-END."
- **BUILD THE IDENTITY LANGUAGE INTO THE APPEAL,** E.G. "THE KIND OF PERSON WHO..." SO THE ASK IS ALREADY DOING THE WORK.
- **LEAD WITH MONTHLY OPTION IN ASKS (ONE-TIME CAN STILL BE THERE!)**
- **SEND A TEXT MESSAGE OR CALL TO WELCOME THEM IN!**

# YOU PICK

Convert one-time to monthly

- **ADD A PERSONALIZED THANK YOU EMAIL** (SET THIS AUTOMATION UP WITH ZAPIER / MAKE) TO CREATE AN EMAIL IN YOUR DRAFT FOLDER
- **INCLUDE THE OPTION TO JOIN THE MONTHLY COMMUNITY** WITHIN YOUR THANK YOU EMAIL SERIES
- **IF YOU CAN, GATHER ANOTHER COMMUNICATION TOUCHPOINT** (PHONE AND/OR ADDRESS TO SEND A DM PIECE OR TEXT INTRODUCING THE MONTHLY GIVING PROGRAM AND THAT THEY'RE INVITED!)
- **PREP & ENTER THEM INTO A MONTHLY GIVING CAMPAIGN** SERIES IN JANUARY (EXCLUDE CERTAIN SEGMENTS)



**This doesn't have to stay on your list**  
*anymore.*



# Free Monthly Giving Assessment

**In a 20-minute consultation, you'll uncover:**

1. What failed payments and churn cost you
2. Which donors are ready to give monthly
3. Your top fixes, prioritized by ROI



# Special Offer