

Recurring Giving Communications Plan

Four pages, one per moment in a giver's journey. Before you start, have your ongoing value proposition in hand: every answer you provide should tie back to why support needs to be ongoing, the human need it meets, and the outcome a giver makes possible.

Page 1 | Acquisition

Who this is for: People giving to your organization for the first time. They may have heard of you before, but no gift has been made yet. Your goal is to invite them in as recurring givers from the start. Recurring giving is a bigger ask than a one-time gift. You cannot reuse your one-time strategies, and you are not asking for twelve copies of a single gift. A new person needs connection before the recurring ask makes sense.

Define your audience

Where do you have the biggest opportunities to get in front of prospective givers? List the groups you want to reach (i.e., volunteers, event attendees, social followers, community contacts).

What are your acquisition audiences?

Build connection first

Before any ask, a new person needs three things. Note how you will provide each:

How will you build their connection to the cause?

How will you communicate the ongoing need (not just a one-time need)?

How will you give them a sense of the community they would be joining

Map the sequence to the ask

Plan the steps that lead to the invitation, and where each happens (i.e., email, event, conversation, social):

1. **Introduce the mission.**
2. **Share impact.**
3. **Build familiarity.**
4. **Invite into recurring giving.**

Shape the ask

A strong recurring ask justifies why support needs to be ongoing, connects to a specific human need and outcome, invites the person into your named program and community rather than a transaction, and lets the giver choose the amount where possible (listing a higher amount first as a price anchor).

How and where will you make the recurring ask, and what will it say?

Plan the follow-up

When someone engages but does not yet give, follow up with more information.

What further information can you follow-up with for non-givers

Page 2 | Conversion

Who this is for: Existing givers who give, but not on a recurring basis: one-time, lapsed, and irregular givers. These givers already believe in the cause. Your message deepens a commitment that already exists rather than building one from nothing. The work is less introduction, more invitation.

The 60-day window comes first

The highest likelihood of conversion is within the first 60 days of a first gift. The recent first-time giver is your sharpest target. Build your plan so these givers are reached quickly, before the moment passes.

How will you identify recent first-gift donors and reach them inside 60 days?

What will that early, time-sensitive message say?

Define your wider audience

Beyond the 60-day group, list other conversion targets (i.e., lapsed, irregular, repeat one-time givers).

What are your other conversion audiences?

Acknowledge before you ask

Plan how you will recognize their existing generosity before inviting them to do more.

How will you acknowledge their giving so far?

Make the case for ongoing support

Articulate what consistent impact recurring giving makes possible that one-time giving cannot.

Why ongoing support, in your words, for this audience?

Shape the ask

A strong conversion ask is specific and personal, tied to what this giver already cares about, frames the move as going deeper rather than starting over, and lets the giver choose the amount where possible.

How and where will you make the conversion ask, and what will it say?

Plan the follow-up

When someone engages but does not convert, follow up with a more personal invitation.

What is a more personal follow-up invitation?

Page 3 | Onboarding

Who this is for: Every new recurring giver, regardless of how they came in. The goal is that each one feels affirmed in their decision, welcomed, known, and connected to the impact of their giving. Onboarding is a sequence, not a single message. The four windows below give each new giver a steady rhythm across their first two months. Pick the ideas you can do well and consistently. A few touches done warmly beat a flood done generically.

First 72 Hours: A high-touch thank you

Move fast and make it personal. The first contact sets the tone, so it should feel human, not automated. Ideas:

- A warm, immediate confirmation that reads like a person wrote it, not a receipt
- A personal phone call welcoming them to the program
- A short welcome video from your leader or someone the giving supports
- A welcome text, if that fits your audience
- A first marker of belonging that signals they are now part of your named program

What will you do in the first 72 hours?

Within 10 Days: Welcome them into the program

Send a welcome packet that orients them and hands them the value of belonging. Ideas:

- What their ongoing recurring giving specifically accomplishes, in tangible terms
- What they can expect from you: how and how often you will communicate
- The benefits they have (i.e., exclusive or early access to materials, members-only events, branded items)
- A simple way for them to share that they joined, such as a ready-made social media post
- Who to contact with questions about their gift or the program

What will your welcome packet include?

Within 30 Days: Get to know them

Reach out to learn about the giver, by the method that suits them, and store everything in your CRM. Ideas:

- Their story of connection: what moved them to give
- What they hope for from the relationship (growing in faith, impact on a cause, etc.)
- How they prefer to be contacted, and how they prefer to be addressed
- Where they work, in case their gift can be matched
- Personal details for celebration (birthdays, anniversaries, cause-specific milestones)

What will you ask, and how will you capture it in your CRM?

Within 60 Days: Check in

Designate a time to hear how it is going. Refer back to what you stored, follow up on anything open.

Ideas for questions and next steps:

- What is God teaching you through your giving?
- How can we improve our communication with you?
- What else would you like to learn more about?
- Invite them into a benefit they have not used yet
- Invite them to take their next P-E-O step in serving, sharing, praying, or learning

What will your check-in cover, and what next step might you invite?

Page 4 | Ongoing Communications Calendar

Who this is for: Your full group of recurring givers, all year. The goal is to stay connected in a way that is good for them, not just useful to you. Plan around a full 12-month strategy regardless of how often any individual giver gives. Adapt the rhythm to fit your organization.

Start by taking inventory

What do you already send, and how often? (monthly, quarterly, annually)

What content do you have to work with? (i.e., impact stories, organizational updates, mission-aligned content, seasonal touchpoints, personal celebrations)

Then plan the year: For each month, note what goes out and the content or focus of it.

Month	What goes out	Content / Focus
January		
February		
March		
April		
May		
June		
July		
August		
September		
October		
November		
December		

Standing rules as you fill the calendar

- Every month includes at least one acknowledgment of what recurring givers are accomplishing together.
- Keep your program's name and identity present in every touchpoint.
- Flag months where volume should rise or fall based on your organizational calendar.
- Flag months where additional asks could be given (i.e., year-end gift or special appeal focus)

MISSION INCREASE | RECURRING GIVING COMMUNICATIONS PLAN