

Recurring Giving Program Checklist

The master checklist for building and sustaining a recurring giving program, start to finish. Work through the five sections in order. Several items point to a companion tool; each one carries a short echo of what that tool covers, so you can use this checklist on its own or open the companion tool for depth.

Section 1: Foundation and Planning

The decisions that define what your program is, who owns it, and why it is worth giving to.

- ☐ Assign dedicated ownership. Name the person accountable for the health and growth of the program, and resource them to make it happen.
- ☐ Place recurring giving in your P-E-O chart. Decide where it fits and what you are inviting givers into.
- ☐ **Build your ongoing value proposition.** Covers:
 - The ongoing need: why support needs to be ongoing rather than one-time
 - What the giving accomplishes for both the giver and the beneficiary
 - Your giving options and how each level is monetized if applicable. Note: It is recommended to let givers choose the amount where possible and listing a higher amount first as a price anchor
 - The frequencies you will offer: monthly, quarterly, semi-annual, annual

See the [Creating Your Ongoing Value Proposition tool](#).

- ☐ **Give your program an identity.** Covers:
 - A unique name that creates a sense of belonging
 - A visual identity or logo, connected to your overall brand while standing on its own

See the [Giving Your Recurring Giving Program an Identity tool](#).

- ☐ Set your goal. Determine the total recurring revenue you want to raise.
- ☐ Determine how you will handle those who already give recurrently on their own.
- ☐ **Establish your baseline metrics.** Know where you stand before you grow. Covers:
 - Total active recurring donors
 - Total revenue from recurring donors (all sources)
 - Percentage of total revenue that comes from recurring donors
 - Estimated five-year long-term value (LTV) of recurring donors

See the [Calculating Recurring Giving Long-Term Value tool](#).

Section 2: Infrastructure

The technology that runs the program. Apply these considerations across every tool: ease of use for both your team and the giver, the customer and donor experience, and capability and scalability.

- ☐ Choose your CRM. This is your central storehouse of data, holding as much information as possible on your champions and how they interact with you. Prioritize recurring giving capability as you evaluate it.
- ☐ Choose your donation platform (the donor-facing piece). This is what givers interact with and the foundation of the donor experience.
- ☐ Choose your donation processor (the back end). It may come with your CRM or be a separate tool. Things to consider:
 - Are there fees associated with online giving?
 - Does it allow EFT processing?
 - Can givers add a one-time gift while setting up a recurring gift?
 - Can it prompt one-time givers to consider giving recurringly?
- ☐ Consider your supporting tools: communications software, email and mobile messaging, system integrations, and analytics.

Section 3: Communications

How you bring givers in, welcome them, and stay connected.

- ☐ **Complete your Recurring Giving Communications Plan.** Covers four parts:
 - Acquisition: communicating with first-time givers to bring them in as recurring givers
 - Conversion: moving existing one-time, lapsed, and irregular givers to recurring
 - Onboarding: welcoming every new recurring giver, regardless of how they came in
 - Ongoing communications: a 12-month calendar of each touchpoint

See the Recurring Giving Communications Plan tool.
- ☐ **Determine the incentives you will offer to encourage people to sign up.** Connect them to the cause rather than making them gimmicks:
 - Matching gift
 - Bonus materials (digital resources)
 - Premiums (front-end or back-end, i.e., calendar, notebook, pens, or keychain)
- ☐ **Determine the benefits recurring givers will receive as members:**
 - Exclusive or early access to resources
 - Members-only communications
 - Members-only events
- ☐ **Determine the tools you will give givers to share their story:**
 - Social media assets
 - Private Facebook groups
 - Videos
 - Printed material
 - Shareable swag
- ☐ **Determine the story your recurring givers can tell about the work they are doing together.**

Section 4: Launch

How you open the program and bring the first givers in.

- ☐ Determine how you will celebrate your founding members.
- ☐ Make recurring giving visible across every channel: website, newsletters, email, appeals, event collateral, brochures, and receipts.
- ☐ **Determine how you will find and invite new recurring givers:**
 - What are your primary invitation mechanisms (personal, email, other)?
 - How will you highlight recurring giving on your website?
 - Will you invite people to join at events?
 - Are there natural upcoming events the launch can align with?
 - How will you invite through one-to-one communication, and who through one-to-many?
- ☐ Decide whether you will secure a matching gift to incentivize the launch.

Section 5: Retain and Refine

How you keep givers, deepen the relationship, and grow the program over time.

- ☐ Approach all messaging prayerfully and with discernment.
- ☐ Acknowledge God and your recurring givers for the gifts already given.
- ☐ Send regular updates and progress reports on the use of funds.
- ☐ Review your retention technology, such as custom email templates, to make sure it is serving your givers well.
- ☐ Be proactive on credit card expiration dates.
- ☐ Follow up on missed or failed donations.
- ☐ Review your metrics regularly against the baseline you set and refine the program accordingly.
- ☐ Include recurring giving forecasting in your annual fundraising plan.
- ☐ Cultivate legacy giving. Your recurring givers are your strongest prospects for a legacy gift.
- ☐ Explore how AI can help you create and scale your value proposition and communications.