



Recurring Giving Resources

The Classy Coaching team pulled together some resources that can help you optimize your Recurring Giving Program. Use this as a reference point and share with your team.

Support Articles

- [Guide to Recurring Donations](#)
- [Edit a Recurring Donation](#)
- [Recurring Donation Migration](#)
- [A Guide to Passthrough Parameters](#)
- [Custom Nudges for Embedded Donation Forms](#)

Recurring Giving Strategies Webinar

- [Recurring Giving Strategies Recording](#)
- [Recurring Giving Strategies Slide Deck](#)

Classy Blog

- [7 Monthly Giving Program Examples to Inspire You](#)
- [7 Ways to Boost Recurring Donor Acquisition at Your Nonprofit](#)
- [Data Reveals the Power of Recurring Donations](#)

Classy Academy

- [Recurring Essentials](#)
- *Coming Soon* Recurring Giving 301

For your Supporters

- [How to Manage My Recurring Donation](#)

CLASSY COACHES FAVORITE TIP

Use every opportunity to gain recurring donors, make sure **monthly giving** is an option on your main donation button.



Recurring Giving Toolkit

Dive into building out or perfecting your Recurring Giving Strategy by following the recommendations below...

Acquisition

Segments to consider for your recurring program appeals:

- **Repeat Donors:** Donors who have made multiple one-time donations
- **Attendees:** Anyone who has attended an event hosted by your organization
- **Fundraisers:** Supporters who fundraise on your behalf (think Peer to Peer)
- **Volunteers:** Anyone who has volunteered their time to support your organization or events
- **New Donors:** First time supporters or donors
- **Website Visitors:** Anyone who lands on your website!

Active Appeals

Before you write: pick a segment and pick a channel (email, social media, direct mail, donation pages, events)

Considerations: Write a compelling message (*no matter the channel, focus on 3 pieces*):

- **Awareness:** Educate your audience on the impact of their recurring donation
- **Confidence:** Acknowledge the audience and their current importance to your cause, focus on ease of becoming a recurring donor, and address potential blockers.
- **Incentives:** highlight rewards and exclusive access granted to members of your recurring program.

Passive Appeals

Website Optimization

- Have a clear Call to Action (CTA)
- Simple and Easy Donation Process:
- Engaging + Informative Content:



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Recurring Giving Toolkit

Retention

When to send stewardship:

- **Welcome Message:** A Thank You/Welcome message should be sent as soon as a supporter signs up for your recurring program
- **Ongoing communications:** Vary based on the organization
 - Impact/Progress Updates: Regular bases (monthly to quarterly)
 - Personal Communication: When bandwidth allows for more personal messaging from your team
 - Special Occasions: Holidays, birthdays, anniversaries
 - Donor Preferences: Be mindful of preferences/ don't be afraid to survey

What stewardship should include:

- **Personalization:** Address donor by name and reference past contributions
- **Rewards and Incentives:** What is the benefit of joining your recurring program?
- **Donor Feedback and Engagement:** Ask for donor feedback or schedule personal conversations
- **Opportunities for Increased Giving:** This should be timed appropriately, but asked eventually

Avoid Churn

Common Mistakes:

- **Failing to Follow Up:** make sure you are continuing engagement/messaging with your supporters
- **Not Asking for Feedback:** Collect information on why donors churn
- **Lack of Personalization:** Don't send generic communication to all supporters
- **Not Offering Options:** Offer alternative ways to support your organization
- **Sole Focus on Re-Engagement:** Don't make your only goal reactivating churned donors. They can support your organization in other ways and are more likely to return down the road.

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