



A workbook for building a multi-million dollar recurring donor program

Use the workbook alongside the [“How to build a multi-million dollar recurring donor program”](#) **playbook** to see how to apply these best practices to your organization



Workbook exercises

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Use this space to explain the value a recurring giving program could bring to your overall fundraising strategy.

Three benefits of a recurring donor program for your organization include:

1.

2.

3.

Step 1: Set recurring giving goals

What are your top three goals for your recurring program? This could be anything from bringing in ten new recurring donors to reaching \$100,000 in recurring monthly revenue next year.

1.

2.

3.

For each goal, what are the next steps you can take to make it a reality?

1.

2.

3.

Step 2: Identify potential recurring donors

Who are the donor segments in your database you could target as potential recurring donors?

-
-
-
-
-

Step 3: Communicate with potential recurring donors

List communication touchpoints you would use that are not a direct ask:

- 1.
- 2.
- 3.

Use this space to write out an email to potential recurring donors.



Tip

Remember, this communication should not be a direct appeal for a donation but should always include a CTA.

Potential segments:

Subject line:

Preview text:

Email:

Step 4: Formulate an ask for potential recurring donors

Now you're ready to make an appeal! Write out a tagline for your recurring program that can be used in every ask medium.



Step 5: Nurture recurring donors

Use this Stewardship Planner as a starting point. You can add emails or customize other elements to fit your organization's offerings. If you already have a stewardship plan in place, use this exercise for inspiration.

Stewardship category	Example engagement action	Example timeline	Engagement action	Timeline
Acknowledgment	Thank you email	Within 24 hours		
	Welcome email	Within 24 hours		
	Thank you call	Within 48 hours		
	Personal email/letter	Within 1 week		
Recognition	Donor spotlight on social media	Monthly		
	Donor spotlight in newsletter	Quarterly		
	Donor event/gala	Annually		
	Incentive/small gift	Annually		

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Stewardship category	Example engagement action	Example timeline	Engagement action	Timeline
Reporting	Newsletter	Quarterly		
	Impact report	Annually		
Ongoing Engagement	Supporter meet-up	Monthly		
	Volunteer opportunities	Quarterly		
	Holiday card	Annually		
	Donor anniversary card	Annually		
	Exclusive meet-up (Coffee with a founder, office tour, etc.)	Annually		
	Donor survey	Annually		

Key takeaways

Write three things you're going to focus on when starting or growing your recurring giving strategy.

1.

2.

3.



Bonus! A recurring donation page checklist

Don't forget the most important step: A way for recurring donors to make a gift!
This checklist will help you to optimize the donation experience.

Create a new campaign

Tip: This could be an **embedded donation form**, a **standalone donation website**, or a **crowdfunding campaign** where you can explain the importance of recurring donations

Make "monthly" the default giving frequency (the most important step!)

Tip: You can offer other donation frequencies, such as quarterly or semi-annually

Add donation amount suggestions

Tip: Make sure the amounts reflect your average gift sizes, and offer one or two amounts that are higher than normal

Include compelling visuals to make the donation page pop

Include **impact blocks** to show how far a recurring donation will go in your organization

Offer incentives for a new recurring donor. This could include a t-shirt for making a \$25 monthly commitment

Publish the new recurring campaign

Make a few test donations to ensure the flow is working smoothly

Now, you're ready to promote your recurring program and bring in new recurring donors!

Need help setting up
your campaign?

Our team can guide you through the process.
Set up a call with someone from the Classy team.