



Regular Giving Checklist

1. Goals

- Define your overall goal for the regular giving program.
- Break down your goal into tangible milestones.
- Create an annual timeline for your regular giving goals.
- Define your target donor profile.
- Evaluate and adjust your goals periodically.

2. Program & Positioning

- Create a unique name for your regular giving program.
- Create a name for your community of regular givers.
- Position your program in line with your organisation's mission and values.
- Create compelling content to communicate the value of your programme.
- Test different message framings to see what resonates most with your donors.

3. Online Presence

- Add a "Give Monthly" button to your website's main navigation
- Add a section about your regular giving program on your homepage.
- Add regular giving upsell to your main donation form.
- Create a dedicated landing page for your regular giving program.

4. Donor Journey & Retention

- Map out your donor journey from acquisition to retention, and develop a 12 month communications plan.
- Take advantage of transactional emails to keep your donors engaged (welcome email, payment confirmed, payment failed) and find new opportunities to surprise them.
- Personalise the communication of your other fundraising campaigns to regular donors, acknowledging their impact before asking for a one-off donation.
- Implement strategies to re-engage lapsed donors.

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5. Data & Reporting

- Make sure you have a system in place to collect data and report on key performance indicators (KPIs).
- Map out your KPIs and report on them regularly.
- Use UTM tracking to report on your marketing efforts.
- Connect your fundraising platform to your CRM.
- Have processes in place for payment failures and lapsed donors.

6. Converting Existing Donors

- Develop a strategy to convert one-time donors into regular givers.
- Test various communication channels to see which ones yield the highest conversion rates.
- Regularly follow up with one-time donors to encourage them to become regular givers.
- Use personalised messaging to increase conversion rates.
- Refine your conversion strategy based on insights from your data.

7. Acquisition

- Identify potential donor sources within your existing network.
- Develop an acquisition strategy that aligns with your budget, testing free sources before investing in paid acquisition.
- Invest in acquiring one-off donors and nurture them into becoming regular donors.