

# Recurring Gifts

# Instructor - Greg Knedler



# Agenda

- Identifying prospective recurring gift donors
- Developing compelling messages and branding your program
- Receipting and stewarding recurring gifts
- Measuring results and evaluating your efforts

# **IDENTIFYING PROSPECTIVE RECURRING GIFT DONORS**

# Define “recurring gifts”

## Davidson's recurring giving program

allows you to maximize your gift to The Fund for Davidson in monthly increments. These automatic deductions from the payment method of your choice (credit card, debit card or checking account) allow you to make an impact on the lives of current Wildcats in a budget-friendly, meaningful way.

### Reasons to consider a recurring gift to Davidson:

- o **Important:** Your recurring gift provides the college with a critical, reliable source of support.
- o **Convenient:** Simply determine the amount and designation to make an impact all year long.
- o **Secure:** Your automatic payment information is safe. Changes can be made at any time by contacting The Fund for Davidson team.
- o **Simple:** Your gift renews automatically and will significantly reduce the number of solicitations you receive from the college.

- Commitment to make a regular donation
- Usually monthly, bi-monthly, or quarterly
- Typically no end date
- Permission granted to use credit cards or paid electronic funds transfers
- Financial information maintained securely

*Example:  
Davidson College*

# Recognize the benefits

- Increased retention rates, leading to an increase in donors
- Reduced attrition rates
- Lower costs (e.g., renewal appeals)
- Easier to manage than renewals
- Donor-friendly and donor-convenient
- Often a donor preference
- Higher average gift and lifetime value



Hey there, Jeffrey!

A few weeks ago, you made your first gift to Georgia State University and joined up with thousands of donors who see Panther potential as a great investment.

Donors like you give life to the programs that have made Georgia State a national model of student success. Even at an amount largely invisible to you—the weekly cost of your favorite coffee here, a takeout lunch there—your impact will be huge.

**We hope you'll commit to sustaining these programs year-round by establishing a monthly recurring gift today.** You'll bolster program funding and show Panthers that you see their potential as limitless. That's a gift worth celebrating!

Help advance the university's mission and Panthers' dreams by establishing a recurring gift today.

Thanks for all you do for Georgia State.

**MAKE A RECURRING GIFT**

# Plan before you participate

Before anything else,  
**preparation is the key  
to success.**

— *Alexander Graham Bell*

- Understand your CRM
- Involve gift processing early
- Discuss credit card processes
- Set up a POC for questions
- Ensure you have a plan for operational efficiencies and clear accountabilities

# Focus on the 3 R's

- **R**ecruit new donors
- **R**etain existing donors
- **R**eactivate lapsed donors





# Appreciate that recurring gifts are not for everyone



- Leverage them to acquire new donors and retain them
- Don't try to convert those already giving the way you want
- Avoid pushing recurring gifts with prospects who are assigned to a major gift portfolio or with consistent larger annual giving donors

# Don't give up on the phone

*“Our phone program is fully [focused on] monthly recurring asks for both alumni and parents. Parents perform really well on recurring gifts. I have scripts or backend information on this too. We do monthly upgrade phone calls twice a year and have success and good conversations.”*



## CELEBRATING PHONE DONORS

All stats from June 2021 - July 2022



**7,399 GIFTS**

**\$100,000 IN NEW  
PLEDGES**




**OVER 1,150  
PARENTS AND FAMILY  
GAVE TO STUDENT  
SUPPORT PROGRAMS**

# Identify key prospect segments

- Employees
- Young alumni
- Graduating seniors
- Alumni association members
- Parents
- Alumni with strong affinity
- Athletic groups
- Non-donors

*Example:  
Brookfield Academy*



*Annual Giving*  
2022

*The 2022-23 Annual Fund Drive is Underway!*

*How Will You Give This Year?*


**A.B.E. CLUB**

In recognition of the 60th Anniversary of Brookfield Academy, we have established the A.B.E. Club. This is a monthly giving club which allows you to contribute automatically to the Annual Fund, Scholarships, or other areas directed by you, the donor. Membership in the A.B.E. Club allows you to provide our students with all they need to succeed and helps ensure the success of BA into the next 60 years.



Since its inception in 1962, Brookfield Academy has never, and will never accept funding from any governing body. Tuition covers everyday operating expenses, and Annual Giving covers all other capital needs. Every dollar of your gifts to the Annual Fund go directly to projects which benefit and enhance our students' educational experience.

*Give Today!*

Questions? Contact [Peter Grossman](#) in the Advancement Office.



# Utilize payroll deductions with faculty/staff



**PAYROLL DEDUCTION**

Faculty and staff can set up recurring gifts or pledges.

[COMPLETE FORM](#)

- Make it simple to give and sign up
- Focus on impact, not just participation
- Provide lots of designation options
- Don't forget student needs (e.g., student emergency funds and food banks)
- Look for memorial opportunities

# Encourage as a way for new grads to start giving

- Since leaving the Air Force Academy, various members of the Class of 2010 donated a monthly allotment of \$20.10 to a class fund
- They raised \$210,000 over ten years for their 10th reunion class gift
- Several alumni switched from an allotment to a credit card recurring gift after serving their five years in the Air Force

## CADET MORALE TAKING OFF THANKS TO THE CLASS OF 2010

[« Back](#)

Cadet morale taking off thanks to the Class of 2010



When Nate Dial and the Class of 2010 left the Air Force Academy over a decade ago, they wanted to make sure they left their mark on the Academy. As 22-year-olds, they weren't sure what that mark would be, but they were confident their class could make a difference.

# Think unconventionally

AIR FORCE ACADEMY FOUNDATION FALCON FUNDER About/FAQs Log In

## Class of 1968 55th Reunion Project (Cemetery Markers)

**\$30,150**  
9%  
Raised toward our \$306,868 Goal  
34 Donors

**341** DAYS LEFT  
Project ends on December 31, at 11:59 PM MST  
> Project Owners

Give Today!

- Consider all donor types
  - Crowdfunding donors
  - Giving day donors
  - Gift-in-kind donors
  - Capital project donors
- Develop provisional options to deal with residuals

Option →

Example: Air Force Academy Foundation

A Project by Air Force Academy Foundation

Please enter the amount you would like to contribute\*:

One Time  Recurring

Frequency  Duration

per charge

Total recurring amount \$1200  
Number of recurring payments 12

Contact Information

Email\*

First Name\*

FAQ

Giving Instructions

Select a "One Time" or "Recurring" Gift.

For "One Time" gifts: enter your total gift amount in the box provided.

For "Recurring" gifts: select the preferred Frequency of your gift - "Monthly" "Quarterly" or "Annually"; select the Duration of your gift (Note: a gift duration of greater than 2 years, can only be paid quarterly or annually; enter the recurring charge amount for your total gift (Example: For a total gift amount of \$2,400, paid monthly for 24 months, the per charge amount is \$100). Please limit gift pledges to a maximum of 5 years.

← FAQ on recurring gifts

# Allow recurring gift donors to self-identify

- Direct-mail reply devices
- Online giving forms
- Phone ask trees
- Informational page on website



Here For You Fund

Choose Amount

Choose Frequency

Choose Term

Prefix  First Name  Last Name

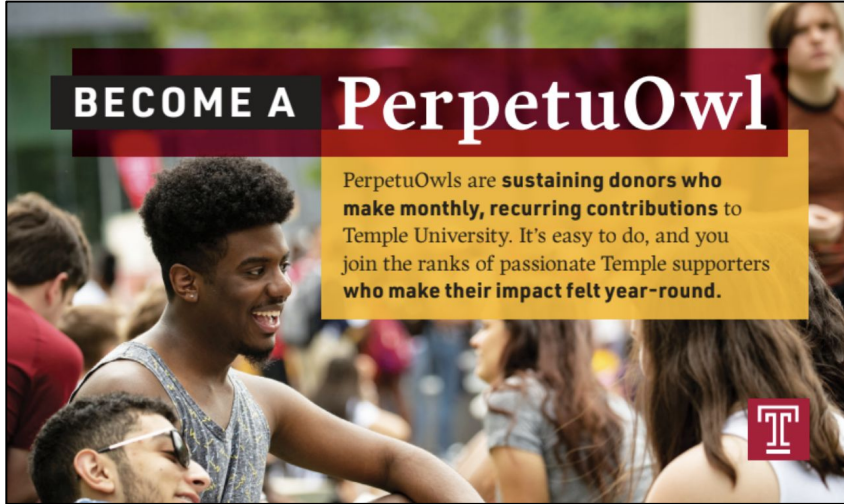
Email Address

Powered by Community Funded

# **DEVELOPING COMPELLING MESSAGES & BRANDING YOUR PROGRAM**



# Spend some creative juices on branding



- Connect the branding to the cause
- Consider using outside help or your in-house marketing department
- Make it a student exercise
- Appreciate that a really good idea can take some time to develop and refine




# Embrace your heritage and history

- Take time to research, study, and understand your institution's traditions, heritage, and history
- Let history serve as a tool with legacy donors and affinity groups
- Look for meaningful recognition opportunities



# Put it up front and stress the purpose



**Transform lives like Adane's each and every month**

When 8-year-old Adane's community received clean water, everything changed. Suddenly, he could go to school full-time and dream even bigger: all because of monthly donors.


Join **The Spring**, our monthly giving community, to rewrite stories like his for the better.

Enter an amount to give per month

\$ 20 USD/MONTH

Your \$20.00 monthly donation can give 6 people clean water every year. 100% funds water projects.

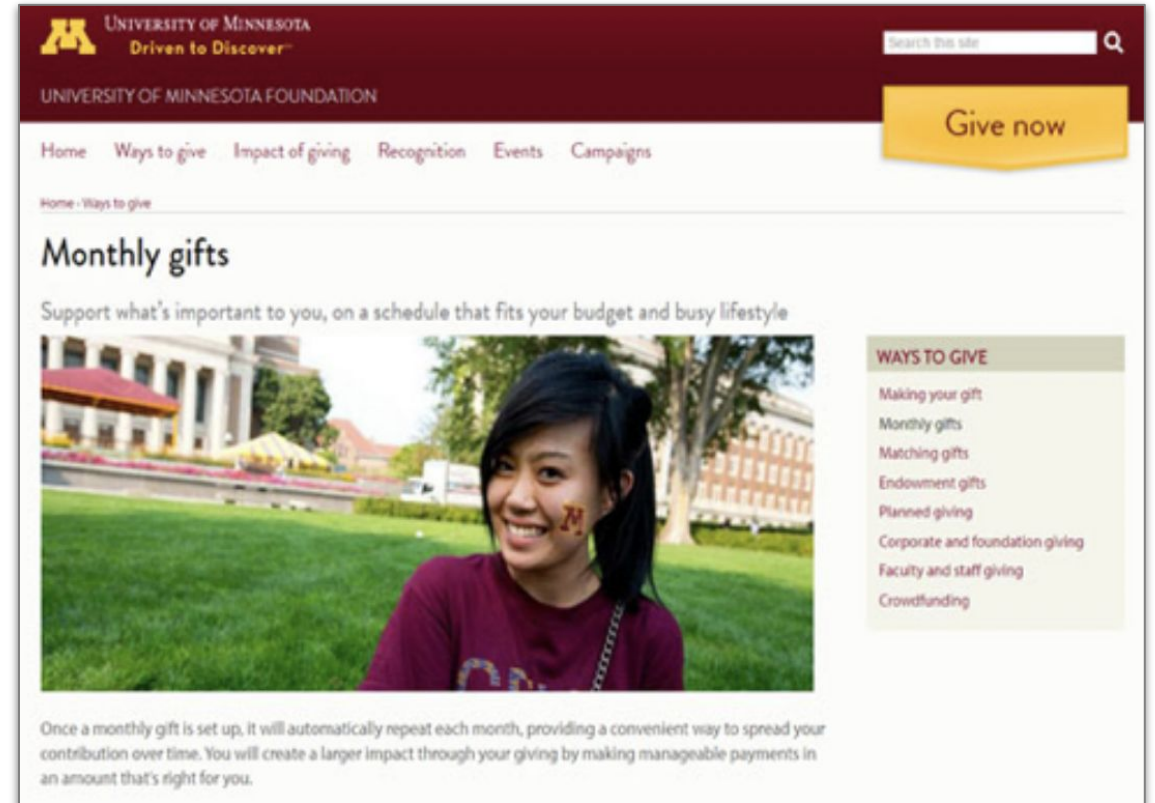
Secure Payment - This site is protected by reCAPTCHA and the Google Privacy Policy and Terms of Service apply.



- Feature recurring giving on your homepage and other giving pages
- Think about an impact statement in your headline
- Use compelling photos and graphics to convey your cause

# Create an informative webpage

- Describe how recurring gifts work
- Explain the impact
- Highlight the cost savings
- Address FAQs
- List recurring giving as a “Way to Give” on all website menus and submenus



*Example: University of Minnesota*

# Feature testimonials

- More compelling descriptive text
- Great way to show the power of numbers
- Good engagement tool for major gift prospects

*Example: Furman University*



We are grateful for alumni like **Fiona ('12) and Joel ('12) Bloom** who give monthly to Furman United to help students with unexpected financial needs. *Join them in their generosity.*

RECURRING GIFTS ARE A SIMPLE AND CONVENIENT WAY TO SHOW YOUR SUPPORT FOR FURMAN STUDENTS. OVER TIME, THESE GIFTS ADD UP BIG—DIRECTLY IMPACTING THE UNIVERSITY PROGRAM YOU CARE ABOUT MOST!

*“The Furman United scholarship had an immense impact on our Furman experience by providing much needed support when we needed it the most. We give to the Furman United scholarship in part because we want to pay back the generosity that the scholarship provided us, but more importantly to be able to reduce the financial burden for current and future students looking to take full advantage of the Furman experience.”*

**BECOME A RECURRING DONOR TODAY AT [FURMAN.EDU/RECURRING](https://FURMAN.EDU/RECURRING).**



SCAN TO IMPACT STUDENTS TODAY.

# Leverage giving societies

## SMALL INVESTMENT, SIGNIFICANT IMPACT

It's easy to enroll in Ten for Terry is just a few short minutes. Every gift makes a real difference and a little goes a long way. Even a gift of \$10 a month helps deliver support where it's needed most.

Ten for Terry participants support the Terry College of Business with a gift of \$10.00 per month. These gifts are designated to the Terry Excellence Fund which serves as a versatile resource that benefits a variety of high-impact programs across the college and allows the college to provide scholarship support to students.

JOIN 10 FOR TERRY TODAY

*Example: Terry College  
of Business*



- View branding, case, and communication as more important than benefits
- Consider specific groups like colleges, sports teams, or other affinity groups
- Tie recurring gifts into your consecutive-year giving society

# Highlight potential impact by amount

- Establishes trust with donors—shows them you have a plan
- Helps raise money for purposes, not just goals
- Plants a seed for future upgrades

*Example:  
Davidson College*

So what kinds of things can my monthly contribution support?



- \$10/month = \$120/year**
  - o The average cost of a monthly counseling service for one student, which is provided free of charge through the Center for Student Health and Well-Being.
  - o Provides a month's worth of groceries for a student through the Lula Bell's Resource Center.
- \$50/month = \$600/year**
  - o Provides books for a student for a year.
  - o Contributes to scholarship support for students to excel and take advantage of all Davidson has to offer.
- \$75/month = \$900/year**
  - o Provides funds for at least three students to participate in a professional conference through the Center for Career Development.
- \$100/month = \$1,200/year**
  - o Sustains WDAV's production and operations software for one week, which enables them to produce concert programs such as Carolina Live and the Davidson College Concert Series.
  - o Supports faculty research, travel, professional development and education, allowing professors to remain at the top of their field and bring that knowledge and expertise to their teaching.
- \$125/month = \$1,500/year**
  - o Provides a Student Spike! Grant through Friends of the Arts to foster extracurricular student art exploration of any medium.
  - o Creates opportunities through the STRIDE Student Experience Fund by way of the college's Diversity & Inclusion designation.
- \$415/month = \$5,000/year**
  - o Creates a named, current-use scholarship for a student.

# Celebrate milestones

## Happy Anniversary!



Dear Mr. Bodak,

We're celebrating you all month long because you've completed two years of your sustaining gift to Rutgers. Thank you!

**It takes a genuinely dedicated donor to give not just once but continually throughout the year.** This level of dedication shows how much Rutgers means to you. And trust us, that feeling is mutual. Because we can consistently count on your support, Rutgers can better plan to meet student and program needs throughout the year.

Rutgers seeks new ways to fulfill its role as one of the nation's most prominent research universities working to better the world. No matter what fund you support, you help make that possible. We can't wait to celebrate you again this time next year!

Sincerely,

Nichole Mastrianni  
Senior Director, Donor Relations  
and Stewardship



**RUTGERS.**  
UNIVERSITY FOUNDATION

Department of Annual Giving  
335 George Street, Suite 4000  
New Brunswick, NJ 08901

- When a donor starts a new recurring gift
- Giving date anniversaries
- Demographic milestones (e.g., birthdays, graduation anniversary dates)
- Project-related milestones (e.g., ribbon-cuttings, groundbreakings, goal milestones)



# **RECEIPTING AND STEWARDING RECURRING GIFTS**

# Make the initial acknowledgement special

Lt Col (Ret) and Mrs John Q. Sample  
4810 Jedediah Smith Road  
Colorado Springs, CO 80922

Dear Colonel and Mrs \_\_\_\_\_

On behalf of the Board of Directors of the United States Air Force Academy Endowment, thank you for your generous monthly commitment of \$100.00 for the Class of '70 Fund (Heritage Trail).

The Academy is a premier educational institution, providing cadets with a first-class education while preparing them as leaders of character for the Air Force and our nation. Private support like yours plays a vital role in the development of our future officers by helping to fund top-notch programs and projects.

Once again, on behalf of the men and women of the Air Force Academy, thank you for your continued generous support.

Sincerely,

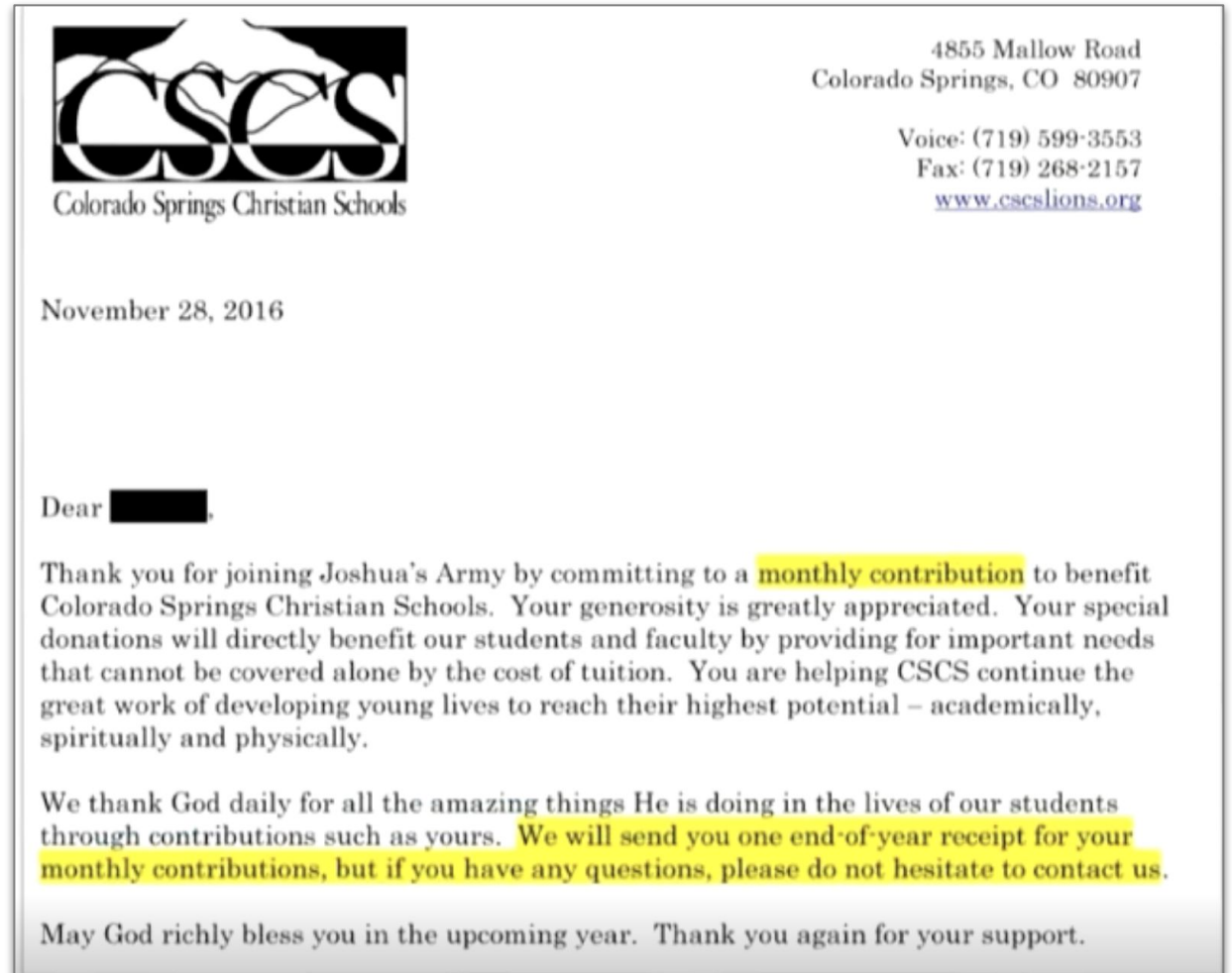


Greg Knedler  
Associate Vice-President, Development Services

- Welcome recurring donors as if they are participating in or joining something important
- Keep it clear and concise
- Review the key points (e.g., amount, timing)
- Provide contact information for questions and issues

# Exclude from printed receipt systems

- Consider monthly stewardship emails for each transaction instead
- Send a year-end summary
- Differentiate a recurring gift from a total annual giving summary



# Be thoughtful when it comes to recognition



## 2020 Mountain Song Community School Annual Appeal

“Those who sign up for a monthly gift will be honored with a special student-made Waldorf star in the school”



- Appeal to donors’ feelings and provide recognition that is meaningful
- Think of a connection to the cause
- Avoid simple trinkets and tchotchkes
- Remember that you don’t always have to share planned recognition upfront; the best recognition is often unexpected

# Integrate and communicate

*“Don’t set donors up for recurring giving and then ignore them. These are some of your most loyal donors, so make sure that they receive a good, initial thank you for signing up and ongoing communications such as email newsletters, annual reports, and an occasional unexpected thanks for gifts.”*



Colorado Springs  
Christian Schools  
JOSHUA'S ARMY



**BOYS WIN STATE CHAMPIONSHIP AND THANKS TO YOU - THEY LOOKED GOOD DOING IT!!!**

Donations by Joshua's Army donors were used this year to purchase new uniforms for the Boys & Girls CSCS basketball teams. Your monthly contributions continue to make a difference in our school and in our community. It was our moment to shine, and thanks to you - we looked good doing it.

Thank you for making a difference!!

# Develop an upgrade strategy

- Allow time to make sure payments are coming in regularly (9-12 months)
- Give your communications a chance to cycle through (e.g., thank-you emails, tax letters)
- Create a plan for handling expired or canceled credit cards
- Develop an ask matrix with upgrade amounts
- Keep upgrade amounts modest—not more than  $\frac{1}{3}$  current donation



*Example: St. Jude Children's Research Hospital*

# Make upgrades as easy as possible



## Troy Public Radio Sustainer Increase Form

Thank you for your continued support of Troy Public Radio! Your sustaining membership not only supports TPR now, it also allows us to plan for and expand our service in the future.

If you'd like to increase your monthly donation please fill out the form below with your contact information and the amount that you would like to add to your monthly donation. If you would like a particular premium or sponsorship for your increase please include that in the feedback field as well.

After we receive your information someone from the station will be back in touch to confirm your new monthly donation amount.

Thank you, again for supporting Troy Public Radio!

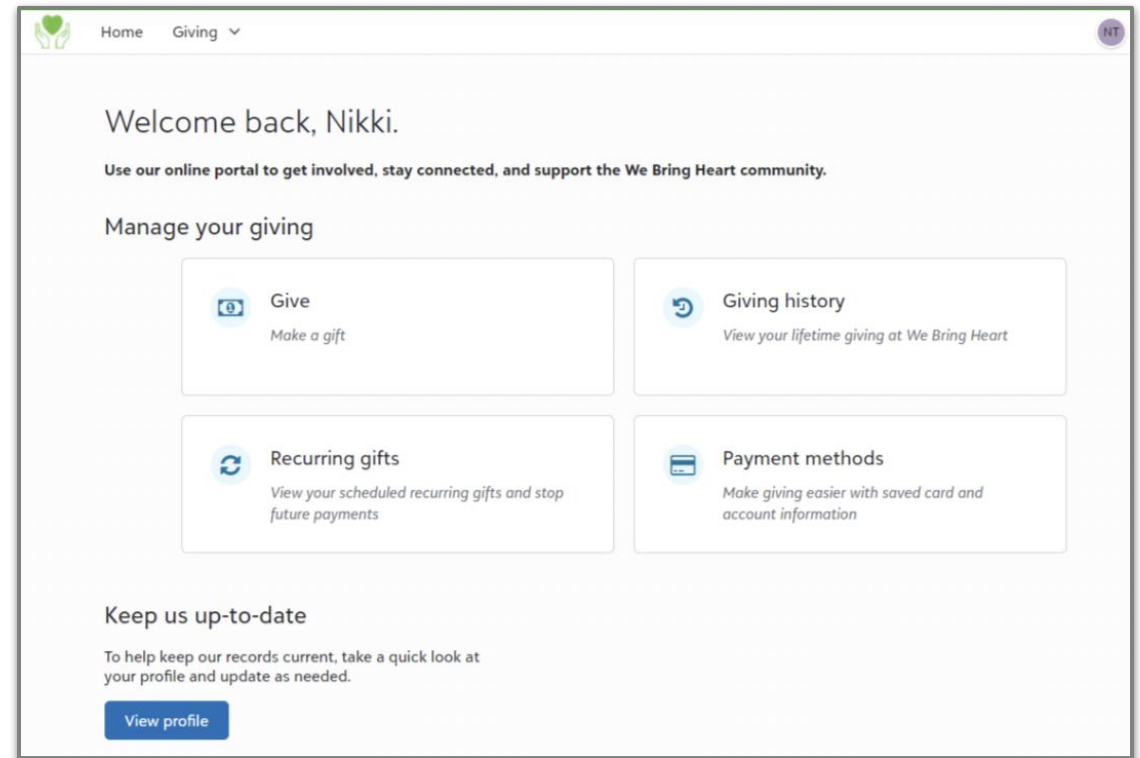
**Name\***

<input type="text"/>	<input type="text"/>
First Name	Last Name

- Develop a simple form
- Don't ask for payment information again if you don't need it
- Explore technical options that may make upgrades easier
- Be cautious of pitfalls with premiums

# Don't let credit card management deter you

- Leverage merchant vendors' automated updating systems/ platforms
- Flag credit cards about to expire
- Communicate with your donors about expiration dates and issues
- Track attrition rates related to cards
- Look for new technologies that give donors control





# Maintain the balancing act

1,788 of you started fundraising campaigns for clean water. You went out and inspired your friends to donate. And 13,782 of them did. Today, the September Campaign hit its goal of \$1.7 million raised. That means 26,000 people in Rwanda will soon drink clean water. Thank you for changing lives.

*- the charity: water team*

[VISIT THE SITE](#)

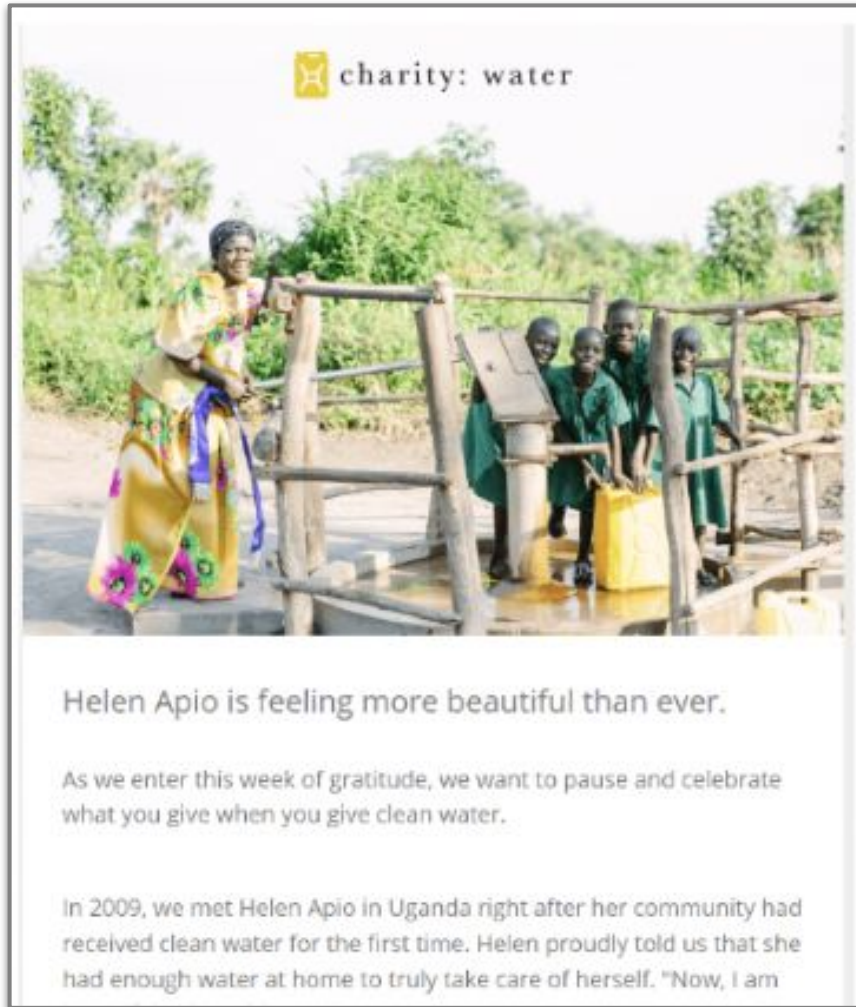
- Remember that recurring donors set this up deliberately
- Avoid “get it and forget it”
- Let them know they are appreciated
- Don’t over-communicate about it or annoy them

# Review the stewardship process

- Were donors thanked as new members of your recurring giving group?
- Were they thanked for upgrading their recurring gift amount?
- Were any donors getting the same thank-you note repeatedly?
- Were they acknowledged as members of this group in all other communications?



# Pour cost savings back into engagement



- Calculate your renewal solicitation savings and reinvest them in stewardship operations
- Build out your stewardship team—consider engagement roles
- Reinvest money saved into your systems and technology

# **MEASURING RESULTS AND EVALUATING YOUR EFFORTS**

# Establish clear goals

- Total recurring gifts
- First-time donor retention
- First-time donor avg. annual gift
- Reactivated donor avg. gift
- Reactivated donor retention



# Measure operational successes and challenges

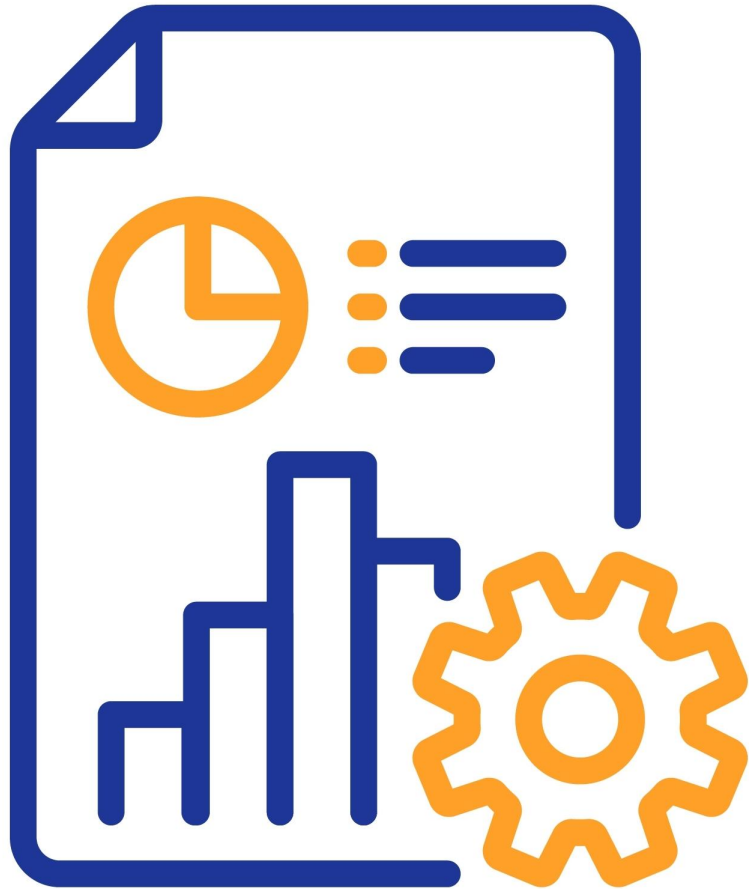
- Require collaborations across multiple departments
- Walk through each step of gift processing and make sure there weren't breakdowns
- Recognize that one-time gift solicitations have a heavy focus on scheduling and channel marketing, while recurring gifts have a much heavier focus on system management

# Develop a checklist for quality control

- Did acknowledgements go out as expected?
- What happened to any credit cards that expired?
- Were all recurring gifts coded correctly for reporting and tracking?



# Create reports to monitor key areas



- **Total received:** \$ amount the donor already paid through the recurring gifts
- **Consecutive payments:** # times the donor paid without a missed, skipped, or failed payment
- **Failed payments:** # times payments were not received because they were not processed successfully (e.g., insufficient funds, declined credit card, donor requested to temporarily stop)



# Know your donor mix

- Determine where you are seeing increases and progress
- Understand how recurring gifts directly affect your mix
- Track percentages of gift types
- Focus on retention

## Donor Giving Analysis

As of 5/28/2019 9:35:34 AM

	# Donors	Total
Repeat	392	\$226,298.66
Increased	871	\$1,198,849.27
New	76	\$39,891.78
Recovered	294	\$161,140.06
Decreased	121	\$48,079.67
	1754	\$1,674,259.44

Based on Cash Receipt Donors

# Connect your analytics to your operating plan



# Key Takeaways

- Identify prospects who are most likely to become recurring donors
- Develop compelling messages and branding for your program
- Steward recurring gift donors promptly and consistently
- Measure results and analyze your efforts on an ongoing basis

**aGn**

**ANNUAL GIVING NETWORK**