

Monthly Giving Campaign Checklist

Use this quick checklist as you start planning your first monthly giving campaign.

- ☐ Feature your donate button prominently on your website and include a link in all of your online outreach.
- ☐ Create an online monthly giving campaign page branded to coordinate with your website and all campaign materials.
- ☐ Add impact labels to monthly giving levels to illustrate what a gift can do.
- ☐ Add impact labels to share what a donation provides.
- ☐ Set up automatic receipts.
- ☐ Design a special thank you and stewardship program for monthly donors.
- ☐ Allow donors to easily update their information.
- ☐ Identify different groups to target for monthly donations based on their previous giving history, giving frequency, giving recency, and how they engage with your organization.
- ☐ Segment your appeals and updates to tailor your message to different types of prospects and donors.
- ☐ Provide the option to choose monthly giving in every ask, appeal, and campaign to help donors realize giving more is possible.
- ☐ Celebrate sustainers (and their impact) by including updates on your monthly giving program in your annual report, newsletters, and on your organization's website.
- ☐ Plan a dedicated monthly giving campaign to target donors who may be more likely to give on a monthly basis.
- ☐ Develop ways to upgrade monthly donors to new giving levels over time.
- ☐ Don't be afraid to ask monthly donors for additional one-time donations during the year.
- ☐ Plan to show appreciation periodically (perhaps quarterly) in addition to the transactional thank you.
- ☐ Track your progress and measure which methods result in the most new monthly donors.
- ☐ Share results, stories, and updates on the impact of your recurring donors.