

4-Step Recurring Giving Campaign Checklist

Recurring gifts are the short-term lifeblood of a church's funding. As an organization that relies on free will gifts, it can be difficult to plan for the future. Monthly scheduled gifts give you a measure of insight and stability. This campaign checklist can help you encourage more givers to commit to gift schedules.

PHASE 1: Strategy & Prep

Start with prayer. Then decide:

- WHO WILL BE THE FACE OF THE CAMPAIGN?** (In keeping with our 2022 Stewardship survey project, we recommend all stewardship initiatives be a cross-departmental effort, but someone must lead.)
- ENCOURAGE ALL MINISTRY LEADERS TO PARTICIPATE.** This will give you:
 - Insight into any glitches, overlooked questions, or unexpected challenges
 - A team that is leading the way
- DEFINE YOUR OBJECTIVES**

Your campaign will be more successful if it is framed in terms of growing the biblical discipline and habit of stewardship rather than simply generosity "levels" or convenience for the church. But it's ok to include those in your talking points. We find that when churches share how recurring giving helps the church, many will set up recurring schedules. They just didn't know the significance of it.

 - **Short term:**
 - Level out dips due to weather, travel, etc.
 - Give ministry leaders better insight for budgeting
 - Other
 - **Long-term:**
 - Provide better insight into financial and spiritual health of the church for planning purposes
 - Provide tools for instilling good stewardship habits for spiritual growth of members
 - Other
- SET YOUR GOAL.** Decide on the number (or percentage of households) of new recurring schedules you're aiming for by a set time (perhaps year-end). The goal is not a financial amount, but increase in households participating in gifts, even at "starter" levels.
- ASSESS YOUR ONLINE RECURRING GIVING CAPABILITIES**

Set up a recurring gift in your current system to make sure you know:

 - **How it works**
 - Is it an automatic ask for each gift or something givers must seek out?
 - Ease of set-up
 - Schedule frequency options offered
 - Ease of giver access to their history and update or change their payment info and schedules

- **Reporting capabilities.** Start with a baseline for where you are now, including:
 - Number of recurring schedules
 - Lapsed or downgraded schedules in past year
 - Percentage of overall gifts coming from recurring

PHASE 2: Launch Materials & Timelines

Create resources explaining the WHY and HOW of the campaign and set dates for sending or presenting to the church. We find that when churches share how recurring giving helps the church, many will set up recurring schedules. They just didn't know the significance of it.

□ MESSAGING

- **Consider creating a simple phone video** of the Senior Pastor or campaign leader explaining why your church focuses on stewardship (*We love how Central Church puts it: We don't want something FROM YOU, we want something FOR YOU.*) Include this video in your email, landing page and Sunday announcements.
- **Ask nongivers to start with the smallest of gifts** (\$1, \$5).
- **Ask current givers** who cannot give more to simply allocate existing gifts to recurring schedules (not more, necessarily, but consistently spaced).
- **Include:**
 - Objectives decided upon in your campaign plan
 - FAQ sheet about recurring giving and how to set up, update, etc.
 - A testimony from a recurring giver on benefits of generosity/scheduled gifts.
 - Stated goal for new schedules

□ COMMUNICATION CHANNELS

- Landing page on your website that contains all your messaging, including links to take action
- Email to non-recurring givers (sample email included in this checklist)
- Sunday announcements
- Brochure or seatback card for offline recurring giving commitments
- Offering talks
- Social media

PHASE 3: Demonstrate Impact

In addition to the objectives stated earlier, help prevent the discomfort (for leaders and members alike) of “talking about money” by framing all giving as partnership with what the church is trying to do in the community THIS YEAR.

- SHARE STORIES OF IMPACT** already accomplished in your church and community. If you have Vision2, show your gallery of media-rich Give Stories to the church.
- POWERFUL VISUAL BONUS:** Have the Senior Pastor or campaign leader lead the way by making the first recurring gift.

PHASE 4: Follow-up Reporting and Communications

In the following weeks after the campaign launches:

- COMPARE YOUR RESULTS TO BASELINE REPORTS**

NOTE: When assessing reports of overall giving, recognize that weekly reports may be less meaningful, as recurring gifts tend to fall into biweekly or monthly schedules. Refer to monthly giving reports for your best visibility into the success of this campaign and other giving trends.
- COMMUNICATE TO THE CHURCH HOW THE CAMPAIGN IS GOING**
 - Reveal the percentage achieved toward your goal and remind people that this is an ongoing goal.
 - Share how this initiative is helping the church.
 - Thank new scheduled givers profusely!
 - Ask for stories throughout the year of how the initiative is helping individuals and families.
 - Roll out additional stewardship initiatives.

SAMPLE EMAIL FOR NON-RECURRING GIVERS:

Subject Line: Will you join us in this important discipleship step?

Hello [name],

As our leadership annually reviews and assesses the needs of the congregation, growing the discipline of biblical stewardship is an ongoing priority. ***But it's not what we want FROM you ... it's what we want FOR you.***

In order for you to begin experiencing the promises of God in this area, we're inviting every household to set up a recurring gift schedule of ***any amount*** through our online giving page, even \$1 per week or \$5 per pay period. (You retain total control to make changes at any time).

Watch the Pastor's video and visit www.ourlandingpage.com to learn all the details and get started.

