

# Tool

## Building a Monthly Giving Program Checklist

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### Stage 1: Set-Up/Planning

- Determine what you will use the monthly giving funds for.
- Determine the total monthly goal you want to raise.
- Name your monthly giving program.
- Determine who is already giving monthly.
- Segment your giver list and identify champions for whom monthly giving would be the next right step.
- Determine the array of giving options you will offer and their monetization explanation.
- Determine if monthly giving is feasible with your current donation processor. If not:
  - Ask other organizations what they are using and if they like it.
  - Things to consider when looking for a donation processor for monthly giving:
    - Are there fees associated with online giving?
    - Does it allow EFT processing?
    - Can champions give a one-time gift as they set up a recurring gift?
    - Can your processor prompt one-time gifts to consider a monthly gift?

### Stage 2: Communication Plan

- Outline your on-boarding process:
  - Determine how you will acknowledge and thank a new monthly giver.
  - Create a welcome packet to be sent.
  - Draft the process for a get-to-know-you communication.
  - Outline the process for a monthly giving champion check-in.
- Determine who will be overseeing the on-boarding process and ensure that all new monthly givers are receiving the same process.
- Complete your P-E-O chart specific to monthly givers to determine the types of people for whom this program is the next right step, and to outline what the next right step after monthly giving could be.
- Determine what benefits supporters of your monthly giving program will receive.
- Determine what tools you can share with champions to equip them to share the story in the cause. Consider:
  - social media
  - private Facebook groups
  - videos
  - printed material
  - shareable swag
- Determine what information you'll record in your CRM on your monthly givers.
- Create your communication calendar related to monthly giving material.
- Determine the story monthly givers can tell about the work they are doing together.

### Stage 3: Launch

- Determine how you will celebrate your founding members.
- Determine how you will find and invite new monthly givers. Consider the list below:
  - Who will you invite via one-to-one and one-to-many communication?
  - What will be your primary invitation mechanism? Personal, email, etc.?
  - How will you highlight monthly giving on your website?
  - Can you invite people to join your monthly giving program at events?
  - Are there natural upcoming events that can correspond with the launch?
- Determine if you will secure a matching gift to incentivize your launch.