



Recurring giving workbook

5 steps to 10x donor lifetime value

Use this workbook to apply the strategies, planning, and guidance outlined in the [accompanying playbook](#).

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Before you begin

Use this space to explain the value a thriving recurring giving program could bring to your overall fundraising strategy.

The top three benefits would be:

1.

2.

3.

Step 1

Run a program health check

Before you can close the gap, you must understand where your recurring giving program stands today. Begin by collecting baseline data across the following core metrics:

- Current number of monthly donors:
- Average recurring gift size:
- Monthly recurring revenue:
- Recurring donor retention:
- Failed payment recovery rate:
- Upgrade, downgrade, and cancellation trends:
- Donor lifetime value:

Based on the metrics you outlined above, what are your top three goals for your recurring program? Ensure each one is specific, measurable, achievable, relevant, and time-bound.

Need a starting point? Here are some examples:

- Increase monthly donors by X% by date .
- Grow monthly recurring revenue from X to Y by date .
- Increase average recurring gift size from X to Y by date .
- Reduce involuntary churn by X% by date .

1.

2.

3.

Step 2

Identify the audiences with the greatest potential

Name up to 10 supporters from each audience below who could be strong candidates for a recurring giving ask.

Repeat donors who are not yet recurring donors:

- | | |
|----|-----|
| 1. | 6. |
| 2. | 7. |
| 3. | 8. |
| 4. | 9. |
| 5. | 10. |

Peer-to-peer fundraisers:

- | | |
|----|-----|
| 1. | 6. |
| 2. | 7. |
| 3. | 8. |
| 4. | 9. |
| 5. | 10. |

Event attendees:

- | | |
|----|-----|
| 1. | 6. |
| 2. | 7. |
| 3. | 8. |
| 4. | 9. |
| 5. | 10. |

Other highly engaged supporters:

- | | |
|----|-----|
| 1. | 6. |
| 2. | 7. |
| 3. | 8. |
| 4. | 9. |
| 5. | 10. |

Similarly, identify up to 10 existing recurring donors who may be ready to increase their monthly gift. Look for supporters who meet one or more of the following criteria:

- ✓ Have been giving consistently for 12+ months
- ✓ Engage regularly with your campaigns and communications
- ✓ Attend events
- ✓ Volunteer
- ✓ Share or advocate for your organization
- ✓ Have made additional one-time gifts alongside their recurring donation
- ✓ Demonstrate other signs of strong engagement

Names:

- | | |
|----|-----|
| 1. | 6. |
| 2. | 7. |
| 3. | 8. |
| 4. | 9. |
| 5. | 10. |

Step 3

Build trust through relevant outreach

Now it's time to create a cultivation message for the supporters you've identified. Focus on building trust, reinforcing impact, and deepening their connection to your mission. To start, take a few minutes to define the purpose of each message, broken down by audience.

1. What do you want them to understand about your organization and its impact?

Example

I want repeat donors to understand that their gifts help provide mentorship and academic support for local students, and that recurring gifts help us ensure those programs are available year-round.

First-time donors:

Repeat donors:

Existing recurring donors:

2. What story, outcome, or insight will resonate most?

Example

A story about a rescued dog that received care and found a permanent home, showing how consistent funding makes these outcomes possible every day, not just in emergencies.

First-time donors:

Repeat donors:

Existing recurring donors:

3. What action do you want them to take?

Example

Click through to read a donor story on our website.

First-time donors:

Repeat donors:

Existing recurring donors:

Once you've defined your message per audience segment, use the templates below as a starting point for repeat and current recurring donors. Customize each one with your impact statement, program goals, and call to action.

Email template: Repeat donors

Subject line: You're helping this work keep moving

Preheader: Your support is already making a difference.

Hi First name,

You've shown up for Organization more than once, and we don't take that for granted.

Because of supporters like you, brief impact statement. Your generosity helps make moments like that possible.

And when support is consistent, it gives us the ability to plan ahead, respond quickly, and keep serving community/mission area when needs change.

Over the next few weeks, we'll share more about the work your support helps sustain, and how ongoing giving can help make that impact go even further.

Thank you for being part of this community.

[Learn more](#)

Email template: Current recurring donors

Subject line: Your monthly gift is doing steady, powerful work

Preheader: See how your ongoing support adds up over time.

Hi First name,

Every month, your gift helps Organization keep showing up for community/mission area.

That steady support matters. Since becoming a recurring donor, you've helped specific impact statement—and just as importantly, you've helped give our team the confidence to plan ahead, invest in what works, and respond when new needs arise.

We're so grateful for the role you play in this work. In the coming weeks, we'll share more about what monthly donors like you make possible.

[See your impact](#)

Step 4

Make the ask

Use the framework below to create a recurring giving or upgrade appeal for one or more of the audiences you identified in earlier exercises.

1. Recognize the donor's connection

How will you acknowledge this audience's existing relationship with your organization?

Example

"Thank you for supporting our back-to-school campaign. Your generosity helped provide notebooks and pencils to more than 200 local students."

2. Explain why ongoing support matters

Why is recurring support important to your organization's mission and future impact?

Example

"Monthly support helps us plan ahead, expand programs, and respond quickly when new needs arise."

3. Illustrate the impact

What specific impact can a recurring gift make?

Example

“With \$25/month, you can help provide weekly tutoring and mentoring for one student each semester.”

4. Define the ask

What action are you asking supporters to take?

Example

“If you’re able to increase your monthly gift by \$5, you can help provide up to 20 additional meals to families facing food insecurity each year.”

5. Reinforce the opportunity

How will you close your message and inspire action?

Example

“Together, we’re protecting the places and wildlife that make our community unique. We hope you’ll join us in sustaining this work for years to come through monthly giving.”

Step 5

Create a donor experience worth staying for

Use the checklist below to evaluate your current stewardship experience for recurring donors.

Stewardship practice	Yes	No	Needs improvement
New recurring donors receive a welcome message within 24 hours			
Communications come from a real person or recognizable team			
Recurring donors receive regular impact updates			
Recurring donors are recognized at key milestones			
We have a plan for identifying and executing upgrade opportunities			
Communications are segmented so recurring donors receive only relevant messages			
We have an automated recovery process for failed payments, expired cards, and canceled cards			

Identify your top priorities

Review your responses and identify the areas that need the most attention.

Priority #1

Area for improvement:

Action to take:

Owner:

Target completion date:

Priority #2

Area for improvement:

Action to take:

Owner:

Target completion date:

Priority #3

Area for improvement:

Action to take:

Owner:

Target completion date:

Ready to put your plan into action?

You've identified your opportunities, built your audiences, crafted your messaging, and mapped out your stewardship strategy. Now it's time to bring your recurring giving plan to life. Whether you're launching something new or optimizing an existing program, our team can help you turn your strategy into results.

Book a demo to see how GoFundMe Pro can help you acquire more recurring donors, retain their support, and grow sustainable revenue.