Recurring Giving: Sample Donor Communication Flow + Six Templates

Retain monthly donors with authentic messages that tell your story and keep loyal donors engaged.
Sample Communication Flow for Recurring Donors

WHAT IS THIS?
A tool from your friends at Network for Good. Use this as a first step to retain more recurring donors. Inside, you'll find:
- A flow chart that will serve as your plan for how often to communicate with recurring donors and what kind of messages to send them.
- Six templates to help you craft each message.

WHO SHOULD USE THIS?
This guide is geared toward communications and development staff. Give a copy to the person at your organization who is responsible for donor communication and donor retention.

WHEN SHOULD I USE THIS?
The first few pieces mentioned in this guide should be finalized at the same time you launch your campaign to recruit more recurring donors. As soon as gifts come in, you should be ready to send follow-up communication.

WHY SHOULD I USE THIS?
You need to let donors know that you need them, they are valued, and they are important! Donor retention research has shown that many donors choose to leave an organization because the nonprofit does a poor job of communicating with them.

Donors stop giving to your organization because they:
- Thought the charity did not need them.
- Received no information on how their donation was used.
- Don’t remember donating.
- Never got thanked.
- Felt communication was poor communication.

Communication is the first step to retaining donors, and your recurring donors need an extra layer of communication sprinkled with gratitude and love.

Let's start spreading that donor love to your recurring donors!
**Sample Communication Flow for a Recurring Donor**

1. **DONOR INITIATES MONTHLY GIFT**
   - **INSTANTLY** Receipt is automatically generated and emailed.

2. **WITHIN 14 DAYS**
   - Send a postcard featuring an impact story.

3. **AFTER 24 HOURS**
   - Send personalized thank you via email.

4. **AFTER 90 DAYS**
   - Send a donor's story explaining why they give.

5. **AFTER 180 DAYS**
   - Send an update on an ongoing project.

6. **AFTER 270 DAYS**
   - Send a personal thank you from staff/board/client.

7. **RIGHT BEFORE 1 YEAR ANNIVERSARY**
   - Send an impact story to demonstrate what a higher level gift will do.

**Dos and Don’ts**

- Do communicate with recurring donors at least once a quarter.
- Do customize communication based on new donor vs. current donor upgrading to recurring donor.
- Don’t include these donors in other seasonal asks.
- Do include these donors in seasonal thank yous.
- Do add to regular communication (newsletter).
- Do invite to events.
- Do invite to participate in special campaigns (like GivingTuesday).
- Do send a summary of donations made at the end of the calendar year.
- Do feature these special donors as a spotlight in your newsletter or other consistent communications piece.
Dear ________________, (Make sure the donor’s name is spelled correctly)

Start with a simple thanks. Be sure to express gratitude for this person choosing to be not simply a donor, but a committed monthly donor BONUS: Include an image that shows your organization in action. Faces and smiles work best.

Why are monthly donors so important? Perhaps they help you plan for the future or ensure funds are available year round. Be concise.

Give an example of what will be accomplished because of their gift. Make it easy to visualize. Be clear that the donor is the one who makes this possible.

Sign off with a statement that makes it clear you will be in touch in the future with evidence that their donations are making an impact.

In your signature, be sure to include a phone number and email address that the donor can use if they have any questions or concerns. If it’s your style, make it clear in your P.S. that your inbox is always open to them.
**Template 2**
Postcard featuring impact story

**FRONT:**
Image featuring faces with positive expressions.
Your nonprofit’s logo should be visible so it will be familiar to donors.
"Thank you!" in big, bold letters.

**BACK:**
A handwritten note works best, but a printed message and signed name is also appropriate.

Dear  ______________ , (Make sure donor’s name is spelled correctly.)

Open with a statement like "you are amazing!" and a message of thanks.

Share a short impact story of no more than four sentences Be sure to make the donor the hero of the story: "Because of you..."

Include one or two lines about why being a monthly donor is so important to your organization. Then, say thanks once more.

In your closing, include contact info that a donor can use if they need to get in touch.
Dear _________________, (Make sure donor’s name is spelled correctly.)

The donor should give a brief introduction and brief history of his or her relationship with your organization.

The donor should explain why he loves supporting your organization and why monthly giving is so important.

The donor should share a story about where she saw her gifts making a direct impact. Has she met a client? Has she volunteered with your organization? Be sure the story is personal and relevant.

The donor should write a few sentences about his choice to be a monthly donor that reaffirms the reader’s decision to give a monthly gift.

In closing, the donor should invite the reader to see their donation in action (if applicable) and close with a simple sign-off.
Give a brief description of a current project and its status. Use who, what, when, where, why, and how if possible.

Now, start your letter: Informal salutation ("Hi, Donor!") and a message of thanks. Give the donor credit for the project’s progress and thank them for making it happen.

If you have images of a project in process, include them here (or include a link to an online gallery).

Tell a personal story about why this project is filling a need and how it will have a big impact. If you have any feedback from clients who are excited about this project, include it here.

Give thanks once more, and make the donor the superhero of this project: "We couldn’t do it without you!"

This letter should come from a program staff member—someone who knows about this project. Include that person’s name and title in the signature.
This message can be more informal and short. Follow this basic formula:

Dear ________________, (Make sure donor’s name is spelled correctly.)

Have the client/staff/board member introduce himself.

Give thanks for his generosity.

Ask the client/staff/member to explain why she loves your organization so much. How has the staff member or board member seen a donation’s impact? What kind of interaction does the client have with your organization, and why does the client value the nonprofit’s services?

Have the client/staff/board member give thanks once more, and sign the note with his or her first name.
Dear _____________________. (Make sure donor’s name is spelled correctly.)

Include a short story that is filled with hope but leaves room for even more positive impact. Include a photo that illustrates this story.

Why is the donor’s monthly gift so important? What kind of impact does it have? Ask your donor to continue their commitment to your cause, and explain why her continued support will have a bigger impact in the months to come.

Ask the donor to increase the gift by $5/$20/$50 per month (segment appropriately). Tie it in to the individual mentioned in the story above as a way to do even more good.

Include a call to action to increase the donor’s gift and a link to your online donation page.

In your signature, be sure to include a phone number and email address that the donor can use if he has any questions or concerns.
About Network for Good

Need an online fundraising solution to jump-start your monthly giving program?

Network for Good powers more online giving than any other platform. Since 2001, we’ve processed over $1 billion for more than 100,000 nonprofits. We are Level 1 Audited PCI Compliant and our Donor Advised Fund is accredited by the Better Business Bureau Wise Giving Alliance, meeting all 20 of its standards for charity accountability. Plus, we’re registered in every state for online fundraising.

We’re a mission-minded organization, just like you, so we understand the challenges you face. We’re here to help.

Our suite of affordable fundraising software helps nonprofits raise money and engage supporters online—plus we provide the expertise, training, and support that will make you a fundraising superstar.

1. **Online fundraising**: Acquire more donors with smarter online donation pages and social fundraising campaigns that encourage giving and match your campaigns. With built-in best practices and mobile-friendly giving options, you’ll raise more than ever before.

2. **Professional email communications**: Send professional email newsletters, appeals, and updates to your supporters. Keep them engaged as you track and learn which messages work best.

3. **Expert coaching**: Exclusive access to Network for Good’s expert advice with personalized reviews, step-by-step tutorials, fundraising templates, and more.

4. **Events management**: Make the most of your events with easy online ticketing, registrations, and donations.

Ready to start your own online monthly giving program? We can help. Visit [www.networkforgood.com/NPO](http://www.networkforgood.com/NPO) or call 1-888-284-7978 to speak to an online fundraising consultant and get started today!

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