

• WEBINAR

**Setting Up the
World's Greatest
Recurring Gift
Program**

**August 20
1:00 pm CT**

Hosted by:
**Nic Prenger,
Sarah Aligo,
Stacy Cope**



1



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PSG
PRENGER SOLUTIONS GROUP

Fundraising Consulting
Annual Appeal Management
Raiser's Edge Database Administration
Fundraising Automation



3



ASKGENIUS[®]
PRENGER SOLUTIONS GROUP

Fundraising Consulting
Annual Appeal Management
Raiser's Edge Database Administration
Fundraising Automation
BY PRENGER SOLUTIONS GROUP



4

403287
Mr. Nic Prenger
9810 Westchester Dr
Omaha, NE 68114-3858

SEEDS OF HOPE
CULTIVATING MINDS
AND HEARTS FOR CHRIST

Yes, I want to help more students receive a Catholic education!

\$100 \$250 \$500 \$1,000 Other \$ _____

I have enclosed a check (made payable to Seeds of Hope)
 Charge my credit card

NAME AS IT APPEARS ON CARD (PLEASE PRINT) _____

5

403287
Mr. Nic P
9810 We
Omaha, NE 68114-3858

SEEDS OF HOPE
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AND HEARTS FOR CHRIST

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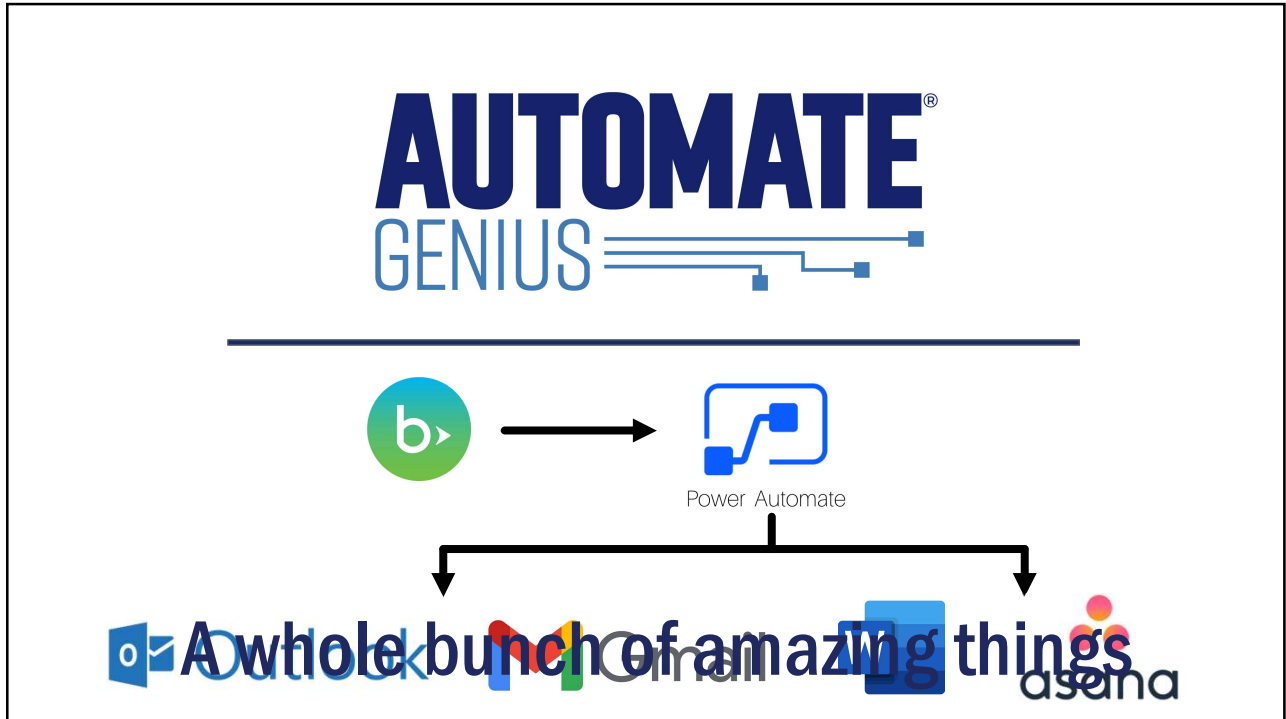
\$100 \$250 \$500 \$1,000 Other \$ _____

I have enclosed a check (made payable to Seeds of Hope)
 Charge my credit card

NAME AS IT APPEARS ON CARD (PLEASE PRINT) _____

Outlook Gmail asana

6



7

Tons of free resources

PSG

8

Webinars
Designed for today's nonprofit, fundraising experts.

Upcoming

Setting Up the World's Greatest Recurring Gift Program
August 20, 2024 1:00pm, Central
How to effectively promote and secure recurring gifts.
[Register to Watch](#)

Popular

Tips and Hacks for Creating Reports and Dashboards in Raiser's Edge
September 10, 2024 1:00pm, Central
Use native reports and automation to increase your productivity.
[Register to Watch](#)

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Setting Up the... Tips and Hacks for... Managing Large...

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Browse Webinars

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Setting Up the World's Greatest Recurring Gift Program
August 20, 2024 1:00 pm CT
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Tips and Hacks for Creating Reports and Dashboards in Raiser's Edge
September 10, 2024 1:00pm, Central
Use native reports and automation to increase your productivity.
[Register to Watch](#)

Managing Large Fundraising Teams - Our Best Advice
Watch Now
Videos and best practices from our internal and external experiences.
[Watch Now](#)

The Fundraising Director's New Best Friend - The Weekly Digest Email
Available to Watch Now
Imagine a report that arrives on time and with all the information you want.
[Watch Now](#)

How to Write the World's Greatest Fundraising Letter
Available to Watch Now
Based on years of testing and the latest scientific research.
[Watch Now](#)










How Much Should You Ask For? A Deep Dive Into Our Research On Setting Ask Strings
Available to Watch Now
A deep dive into our research on setting ask strings.
[Watch Now](#)

Designing the World's Greatest Pledge Card










The Magic Email: How One Organization Raised \$100,000 Through a Walk-Thru

The Best Way to Set Up Campaigns, Appeals, Funds & Package Codes in Raiser's Edge

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 <p>Designing the World's Greatest Pledge Card</p> <p>Available to Watch Now</p> <p>Don't leave money on the table.</p> <p>Watch Now</p>	 <p>The Magic Email: How One Organization Raised \$100,000 through a Well-Timed Email</p> <p>Available to Watch Now</p> <p>How one organization raised \$100,000 through a well-timed email.</p> <p>Watch Now</p>	 <p>The Best Way to Set Up Campaigns, Appeals, Funds & Package Codes in Raiser's Edge</p> <p>Available to Watch Now</p> <p>Tips, tricks and best practices to maximize your fundraising efficiency.</p> <p>Watch Now</p>
 <p>Cleaning Your Donor Database - A Practical, Step-By-Step Guide</p> <p>Available to Watch Now</p> <p>Having a clean database is absolutely critical to your nonprofit's success.</p> <p>Watch Now</p>	 <p>Using Automation to Streamline Gift Processing and Reporting</p> <p>Available to Watch Now</p> <p>Case studies from nonprofit clients who have embraced automation and will never go back.</p> <p>Watch Now</p>	 <p>Using Automation Tools to Personalize Donor Communications</p> <p>Available to Watch Now</p> <p>How automation can make your life easier.</p> <p>Watch Now</p>
 <p>Processing Gifts - Everything You Need to Know About Lockboxes, Banks and Gift Processors</p> <p>Available to Watch Now</p> <p>Everything you need to know about lockboxes, banks, and gift processors.</p>	 <p>Hiring a Fundraising or Database Consultant - What You Need to Know</p> <p>Available to Watch Now</p> <p>Behind-the-scenes look at life as a consultant.</p> <p>Watch Now</p>	 <p>10 Reasons Why Your Current Donation Page is Leaving Money on the Table</p> <p>Available to Watch Now</p> <p>We've researched, designed, and tested countless donation pages and we're sharing everything we've</p>


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 <p>Fundraising Email Strategies to Raise More Money</p> <p>Available to Watch Now</p> <p>How emails can easily impact your fundraising strategy.</p> <p>Watch Now</p>	 <p>7 Common Pledge Card Mistakes & How to Avoid Them</p> <p>Available to Watch Now</p> <p>Learn surprising results from A/B tests, design tweaks, and feedback from donors and tax base providers.</p> <p>Watch Now</p>	 <p>Everything You Need to Know About Year-End Giving</p> <p>Available to Watch Now</p> <p>The secret to high performing year end appeals.</p> <p>Watch Now</p>
 <p>Creating a Welcome Series to Delight Your New Donors</p> <p>Available to Watch Now</p> <p>Practical and impactful advice to make a memorable first impression.</p> <p>Watch Now</p>	 <p>What AI Means to Your Development Office</p> <p>Available to Watch Now</p> <p>Ever wonder how artificial intelligence could revamp your everyday operations?</p> <p>Watch Now</p>	 <p>How to Get and Retain Recurring Donors</p> <p>Available to Watch Now</p> <p>Learn strategies and best practices for this important donor segment.</p> <p>Watch Now</p>
 <p>Everything You Need to Know About Sending Tax Receipt Letters</p> <p>Available to Watch Now</p> <p>Best practices, IRS rules, sample letters and automation tips.</p>	 <p>Direct Mail Fundraising: Tips & Strategies for all Nonprofits</p> <p>Available to Watch Now</p> <p>Get donors to open their mail, rethink your letters and pledge cards, best practices for data analysis and</p>	 <p>How to Use Social Media in Fundraising Campaigns</p> <p>Available to Watch Now</p> <p>How to tap into this ever-changing, powerful tool for nonprofits.</p>

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<p>Best practices, IRS rules, sample letters and automation tips.</p> <p>Watch Now</p>	<p>Get donors to open their mail, rethink your letters and pledge cards, best practices for data analysis and letter segmentation, and more!</p> <p>Watch Now</p>	<p>How to tap into this ever-changing, powerful tool for nonprofits.</p> <p>Watch Now</p>
<p>Do Giving Societies Work?</p> <p>Available to Watch Now</p> <p>The do's and don'ts of donor giving societies.</p> <p>Watch Now</p>	<p>Increase Annual Giving through Donor Personas & Ask Amounts</p> <p>Available to Watch Now</p> <p>How to attract new donors and upgrade existing ones.</p> <p>Watch Now</p>	<p>9 Proven Strategies to Boost Year-End Giving</p> <p>Available to Watch Now</p> <p>What a world-class, high-performing year-end appeal looks like.</p> <p>Watch Now</p>
<p>How to Run a Year-End Matching Gift Challenge</p> <p>Available to Watch Now</p> <p>Matching gift challenges are a simple, effective way to draw attention to year-end giving.</p> <p>Watch Now</p>	<p>Deploy a Strategic Approach to Direct Mail and Informed Delivery</p> <p>Available to Watch Now</p> <p>Learn about Informed Delivery offered by the USPS.</p> <p>Watch Now</p>	

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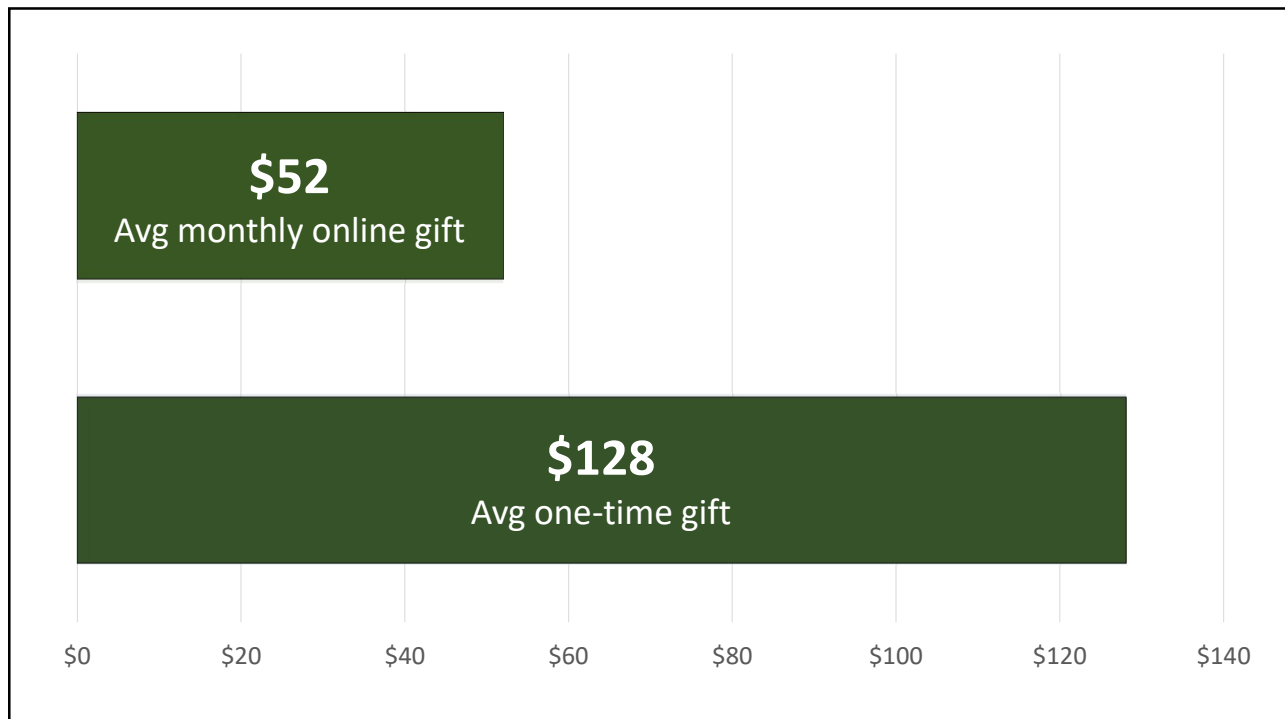


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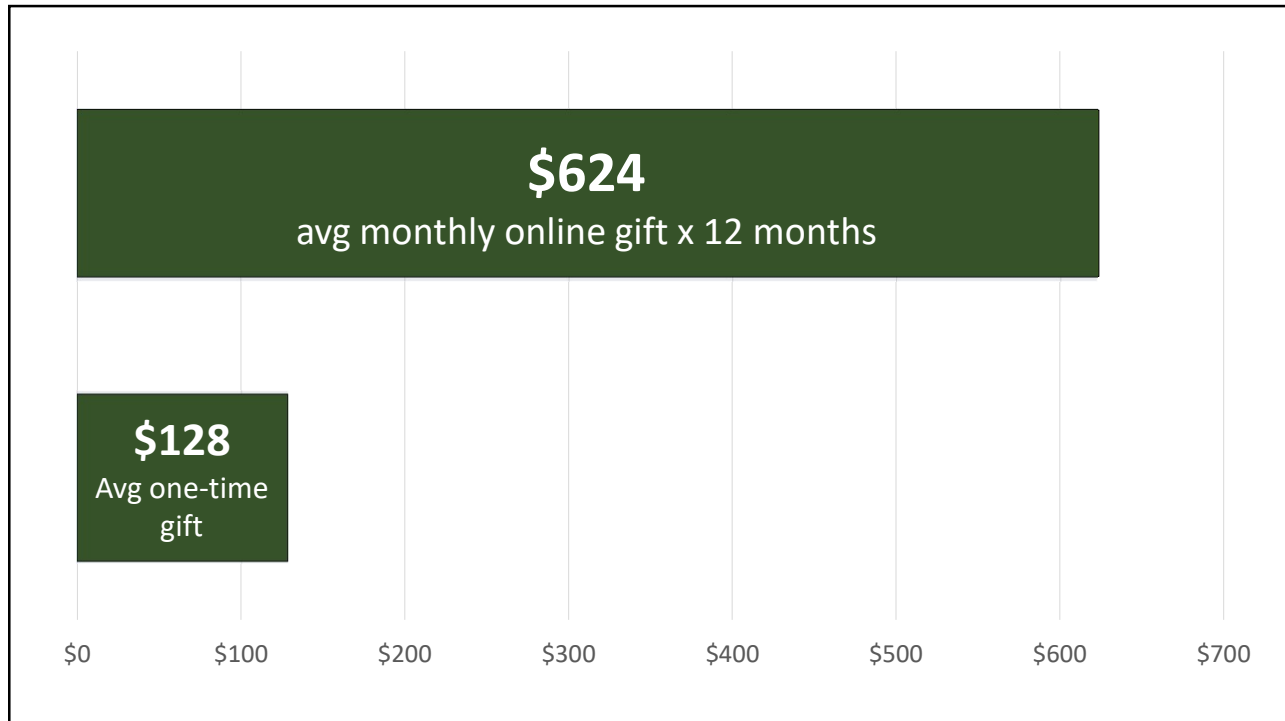
Why recurring giving?



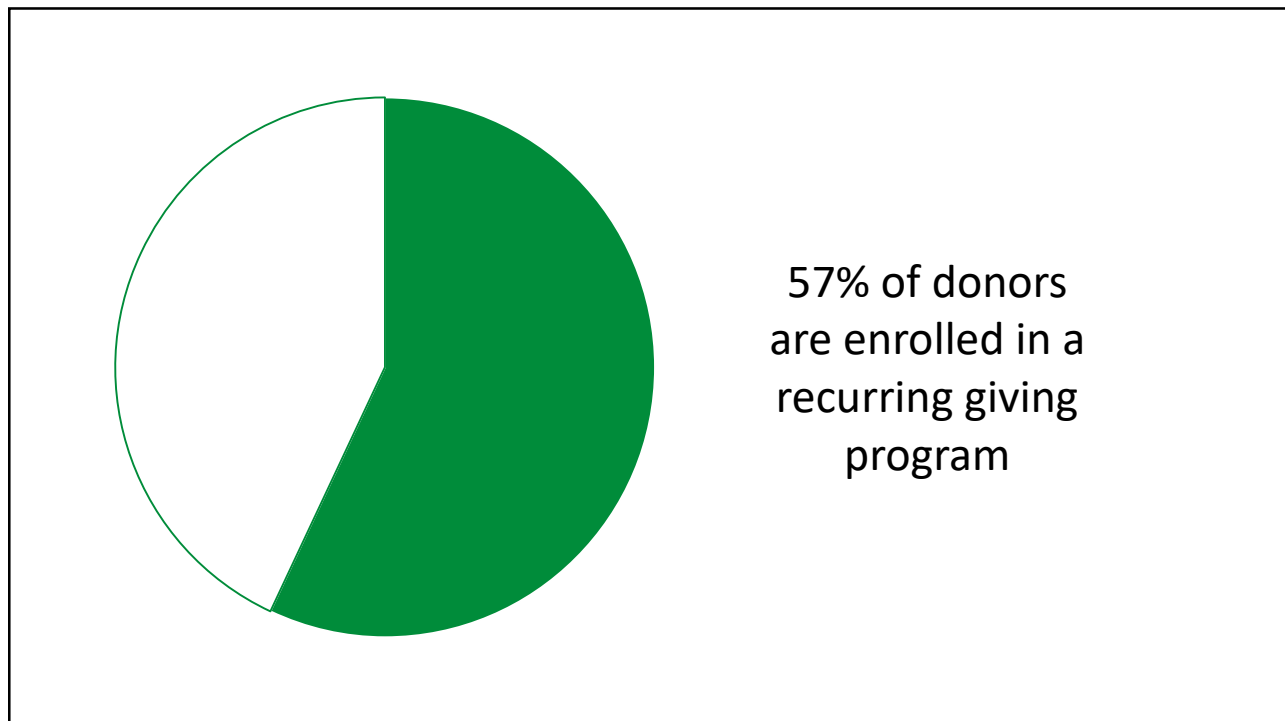
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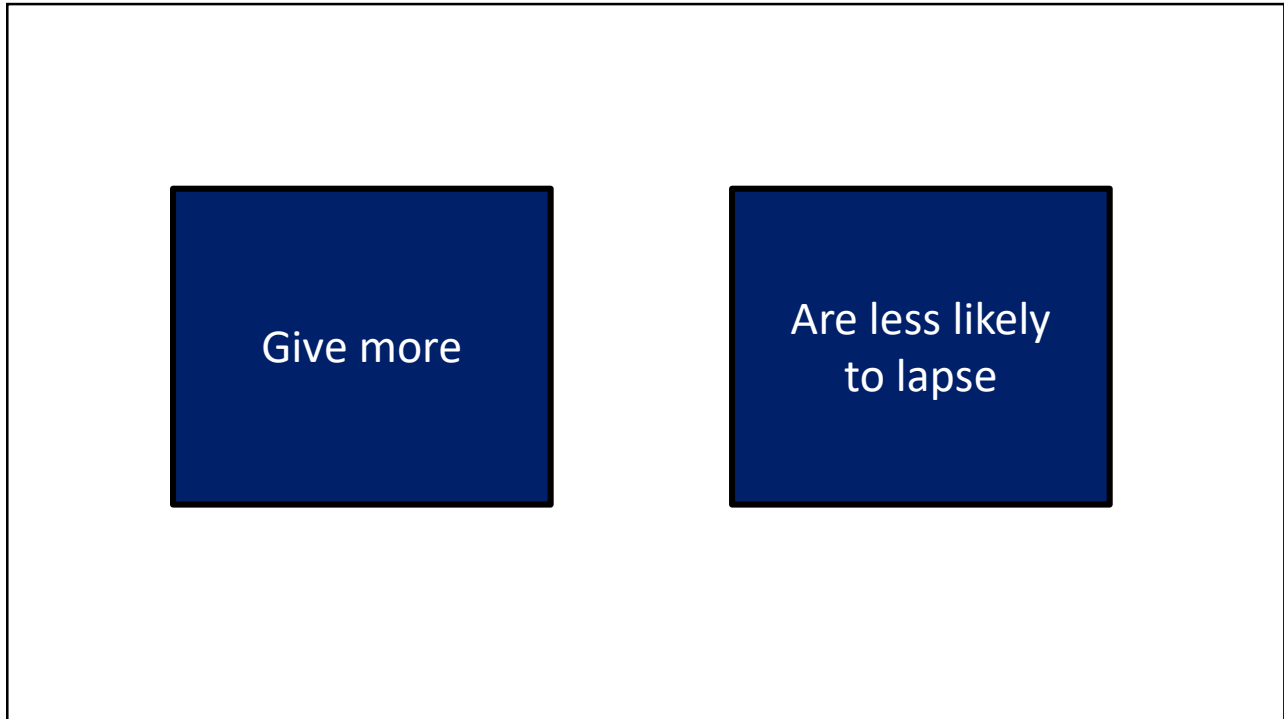
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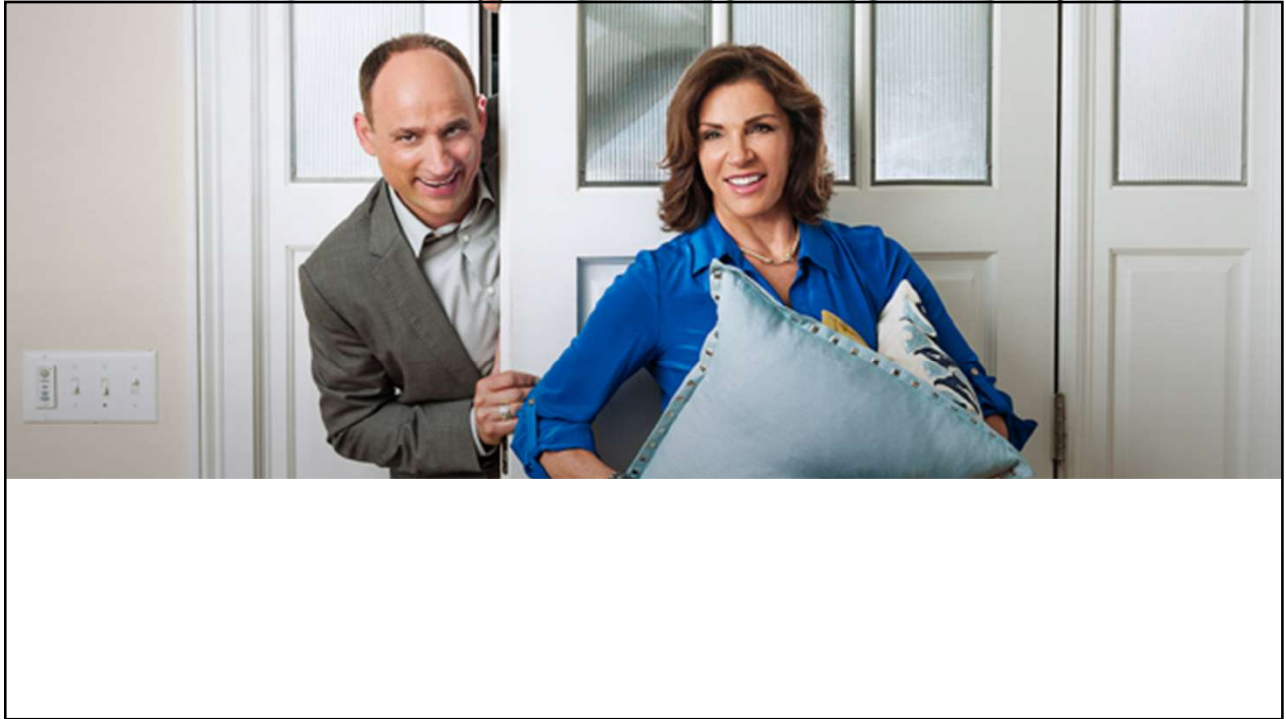
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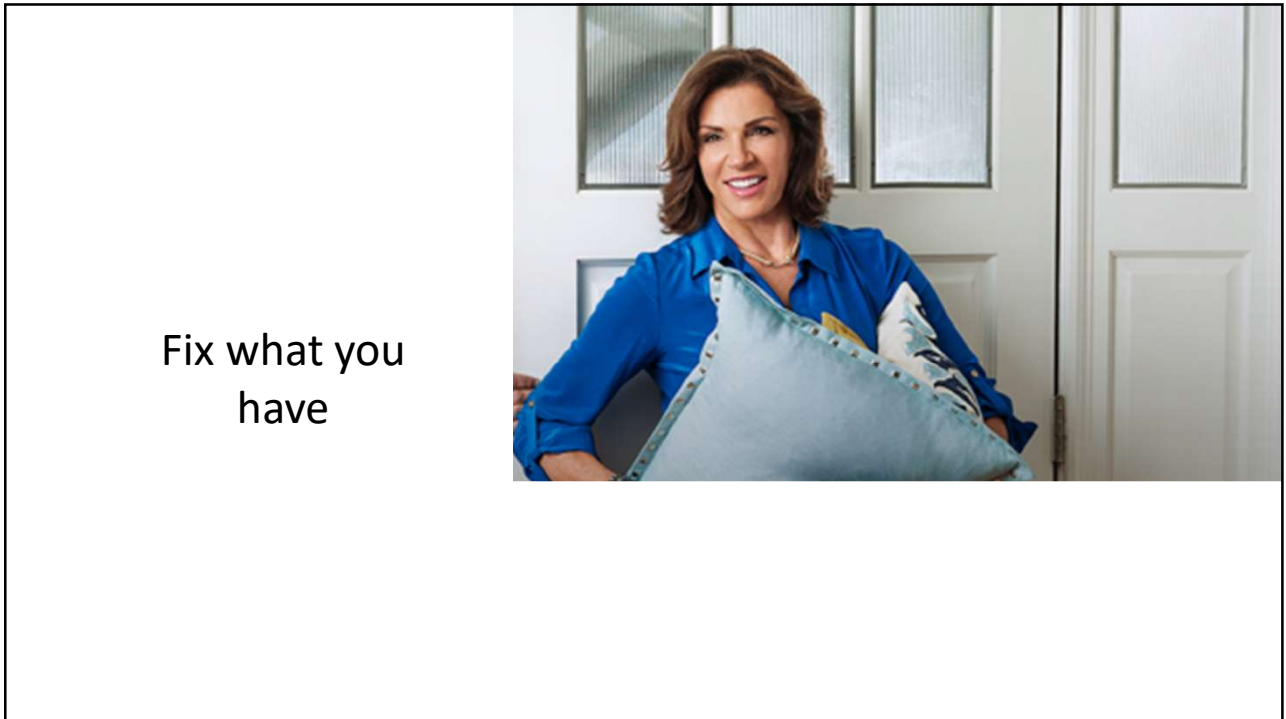
21



22



23



24

Recurring giving

Fix what you
have

Start something new

25



Fix what you have

Add recurring giving to your existing appeals *before starting something new*

26



27

Diocese of Nashville • 2800 McGavock Pike • Nashville, TN 37214-1402 • 615.645.9768

Yes! I/We want to support our Catholic priests, families and the poor in our diocese.

1
OR
2

Primary email: _____

Spouse email: _____

Phone: _____ Mobile Home Work

Save time, save paper, save your handwriting!
Make a safe, easy & secure gift online!

www.Support.DioceseofNashville.com

With a monthly gift of:

\$250 \$125 \$100 \$50 Other \$ _____

With a One-time gift of:

\$1,000 \$500 \$250 \$100 Other \$ _____

Recent gift to the Bishop's Annual Appeal

2019 2018 2017 2016

Member of <Parish Name><City>

<<Constituent ID#>>
 Sample A. Sample
 123 Main Street
 Anytown, USA 00000-0000

28

McGavock Pike • Nashville, TN 37214-1402 • 615.645.9768

1 OR

With a monthly gift of:

\$250 \$125 \$100 \$50 Other \$ _____

With a One-time gift of:

\$1,000 \$500 \$250 \$100 Other \$ _____

Mobile Home Work

Recent gift to the Bishop's Annual Appeal

2019 2018 2017 2016

29

Would you like to designate your gift, or discuss a gift of stock or securities? Do you have other questions?
Please contact Ashley Linville at 615.645.9768 or Ashley.Linville@dioceseofnashville.com

3 Credit Card VISA MC AMEX DISCOVER

Name as it appears on card (please print) _____

Card number _____ I/We prefer to remain anonymous

Exp. Date _____ CVV _____

Donor Signature _____

4 Payment Details
Electronic payments will be processed on the 15th of each month.

Monthly Givers Only **One-Time Givers Only**

Please charge my card:

Until I ask you to stop

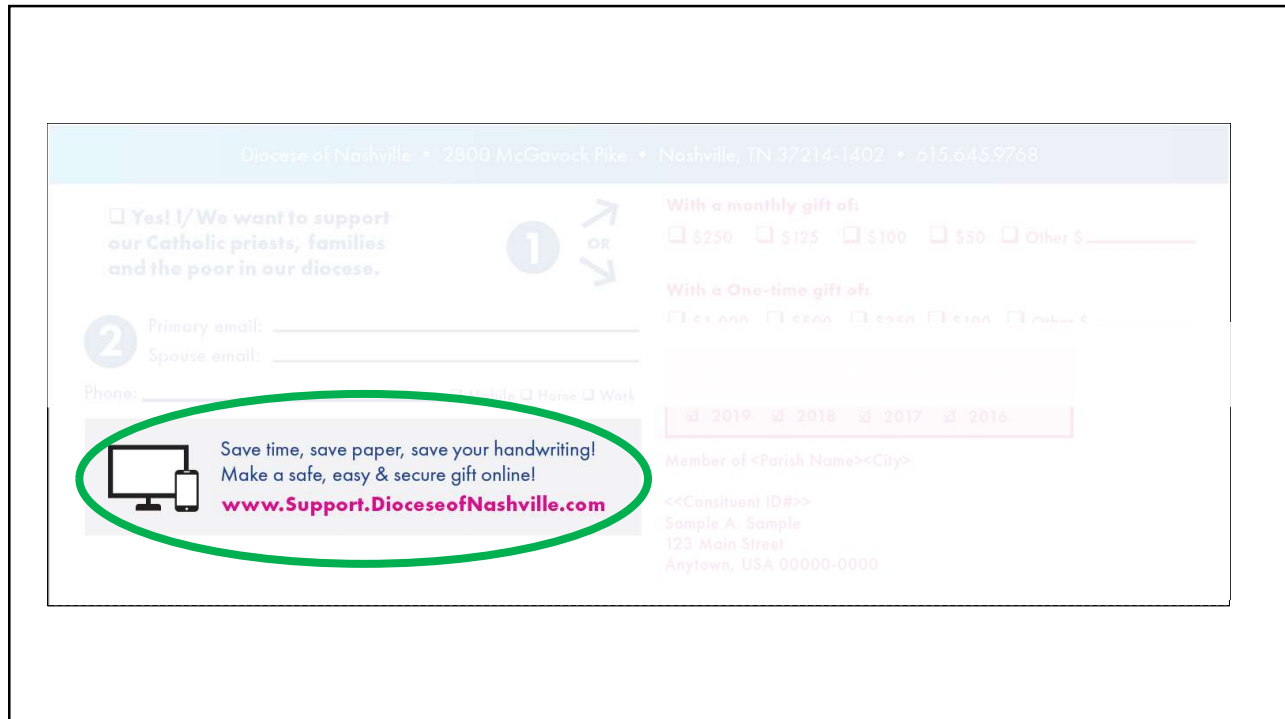
Only through Dec. 2020

Default to recurring gift

Other/Special Instructions: _____

5 Leave a Legacy Yes, I would like to learn more about how to leave my parish, the Diocese of Nashville and/or other Catholic ministries in my estate plans.

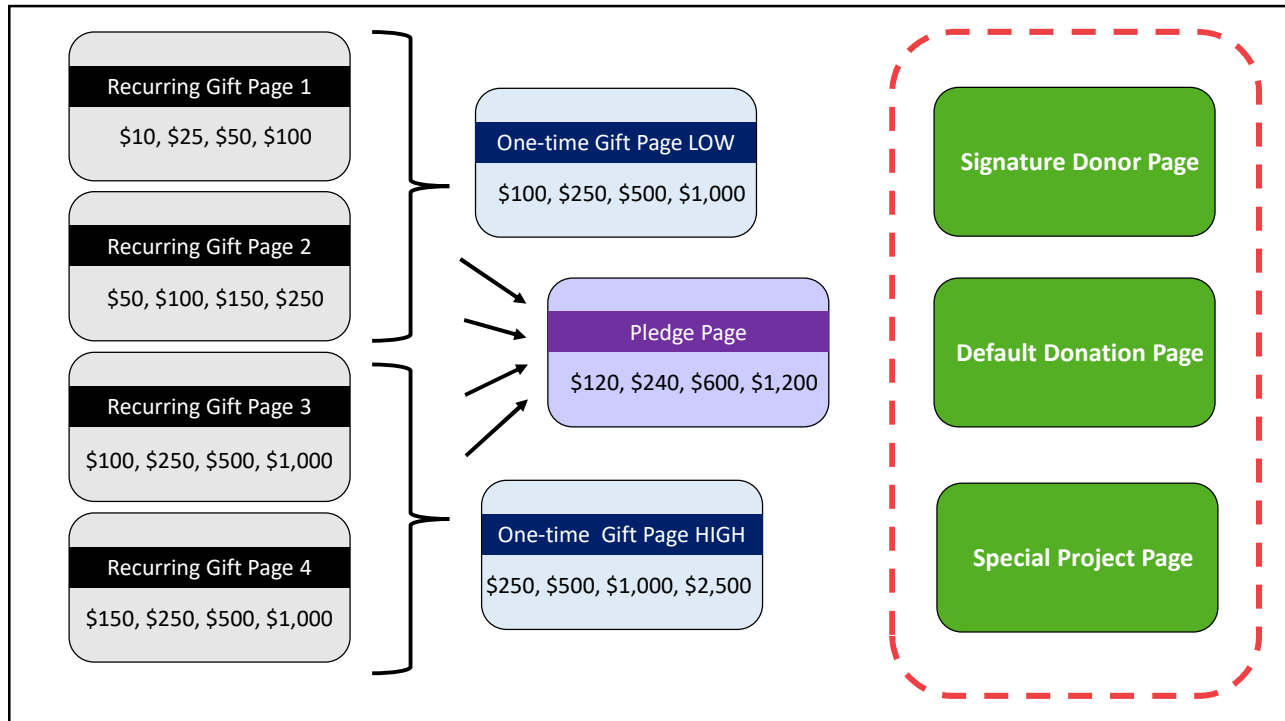
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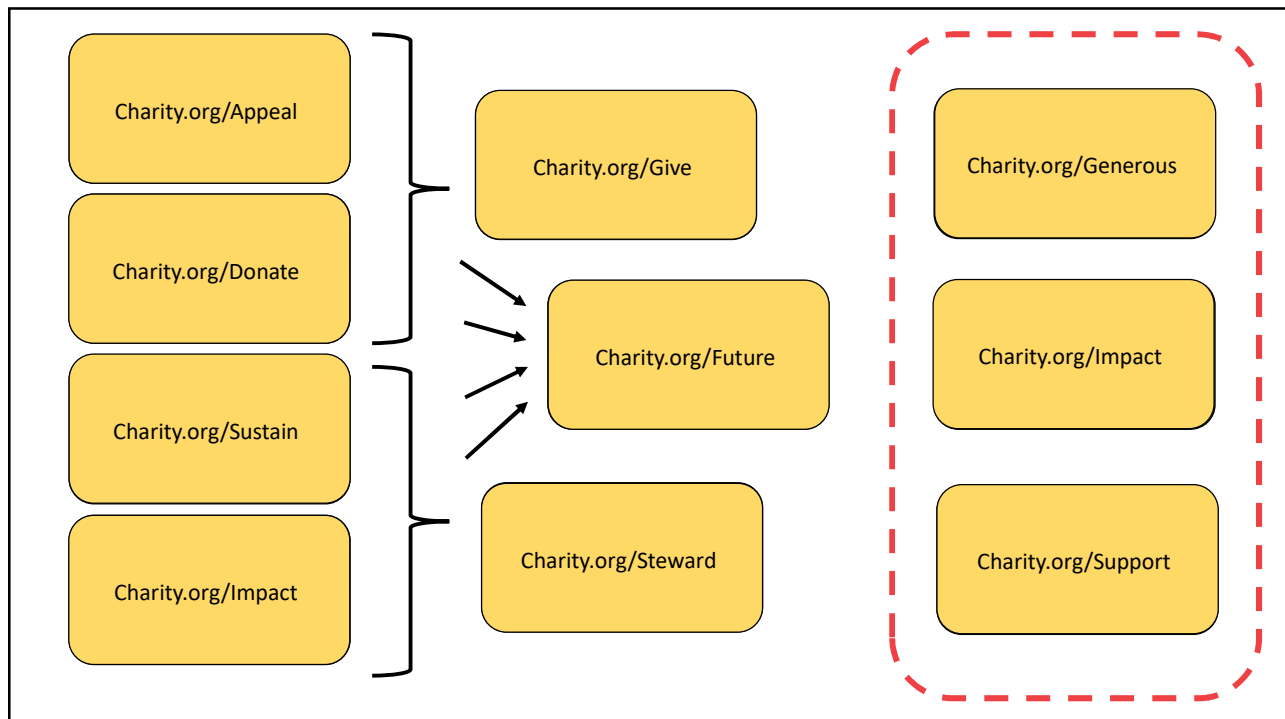
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32



33



34




Put your faith into action

Your monthly gift to the Bishop's Annual Appeal for Ministries will make a lasting difference right here in our diocese.

Set up a monthly gift today and your donation will be used to provide ongoing support to important, Catholic causes.

- Providing workforce development and financial counseling to prevent homelessness
- Promoting vocations to priestly and religious life
- Forming our seminarians
- Placing children with loving adoptive families
- Making Catholic education affordable to our families
- Providing faith formation for youth and adults

Your donation supports more than 70,000 Catholics, 58 churches, 19 Catholic schools and more than 70 charities, ministries and organizations.



Yes! I would like to set up a monthly donation to support the Bishop's Annual Appeal for Ministries

[If you'd prefer to set up a one-time gift click here](#)

Recurring Gift Amount

Society of Bishop Miles - monthly gift of	\$1,500
Shepherd's Circle - monthly gift of	\$1,000
Society of Angels & Saints - monthly gift of	\$500
Society of Stewards - monthly gift of	\$250
Society of Apostles - monthly gift of	\$150
Society of Disciples - monthly gift of	\$100
Society of the Faithful - monthly gift of	\$50


35

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Recurring Gift Amount

Society of Bishop Miles - monthly gift of	\$1,500
---	----------------

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Yes! I would like to make a one-time donation to the Bishop's Annual Appeal for Ministries
If you'd prefer to set up a monthly gift [click here](#)

Donation Amount

Parish Affiliation

Parish

Billing Address

Make this gift on behalf of an organization

Name:


37

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38

Put your faith into action

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- Providing workforce development and financial counseling to prevent homelessness
- Promoting vocations to priestly and religious life
- Forming our seminarians
- Placing children with loving adoptive families
- Making Catholic education accessible to our families

31% of donors who gave online made a recurring gift

Recurring Gift Amount

Society of Bishop Roles - monthly gift of	\$1,000
Shepherd's Circle - monthly gift of	\$1,000
Society of Angels & Saints - monthly gift of	\$200
Society of Stewards - monthly gift of	\$250
Society of Apostles - monthly gift of	\$150
Society of Disciples - monthly gift of	\$150

39

Put your faith into action

Your monthly gift to the Bishop's Annual Appeal for Ministries will make a lasting difference right here in our diocese.

Set up a monthly gift today and your donation will be used to provide ongoing support to regional, Catholic causes:

- Providing workforce development and financial counseling to prevent homelessness
- Promoting vocations to priestly and religious life
- Forming our seminarians
- Placing children with loving adoptive families
- Making Catholic education accessible to our families

Online recurring gifts were 20% higher than offline recurring gifts

Recurring Gift Amount

Society of Bishop Roles - monthly gift of	\$1,000
Shepherd's Circle - monthly gift of	\$1,000
Society of Angels & Saints - monthly gift of	\$200
Society of Stewards - monthly gift of	\$250
Society of Apostles - monthly gift of	\$150
Society of Disciples - monthly gift of	\$150

40

Put your faith into action

Your monthly gift to the Bishop's Annual Appeal for Ministries will make a lasting difference right here in our diocese.

Set up a monthly gift today and your donation will be used to provide ongoing support in regional, Catholic causes.

- Providing workforce development and financial counseling to prevent homelessness
- Promoting vocations to priestly and religious life
- Supporting our immigrants
- Placing children with loving adoptive families
- Making Catholic education accessible to our families

New donors were 44% more likely to give online than existing donors

Recurring Gift Amount


Society of Holy Names - monthly gift of	\$1,000
Society of Angels & Saints - monthly gift of	\$200
Society of Stewards - monthly gift of	\$250
Society of Apostles - monthly gift of	\$150
Society of Disciples - monthly gift of	\$150

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The fundraising letter

PSG

42



April 20, 2022

Address
Address Line 1
Address Line 2
City, State Zip

Dear Holly and Nic,

I couldn't stand that truck.

It was a beat-up old Ford Bronco. It had huge off-road tires, peeling white and brown paint and a cracked rear windshield.

And it was always - always - parked on the curb across from my house. I swear, it never moved. Not once.

It just sat there in front of my house in our nice neighborhood, which was full of modest homes, green lawns and lots of flowers. Most of my neighbors were friendly "empty-nesters" who took a lot of pride in their home, and in the sense of community we had built.

But this truck was the biggest eyesore you've ever seen and it was messing up the look and feel of our street.

I really couldn't stand that truck.

It belonged to the son of one of our neighbors. He was in his late 30s. I don't know the full story, but I heard that he had lost his job, had fallen on hard times and moved back in with his parents. And he just sort of stayed there for a year and a half, with his beat-up Ford Bronco parked on the street the whole time.


Looking back, I didn't like that truck, but I sure respected his parents for supporting their son when he was struggling and had nowhere else to turn.

[over]

Your letter should be...

- Heartfelt and informal
- Indented paragraphs
- Font size 13-14
- Times New Roman
- Underlined and bold words
- 2-4 pages long
- Johnson box at the top
- And a PS at the end

43



April 20, 2022

Address
Address Line 1
Address Line 2
City, State Zip

Dear Holly and Nic,

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Looking back, I didn't like that truck, but I sure respected his parents for supporting their son when he was struggling and had nowhere else to turn.

[over]

Life can be messy. I know there are many parents in similar situations, taking care of adult children who have fallen on hard times. Doing their best and helping where and when they can because that's what parents do.

But not everyone has parents they can turn to when times get really tough. Not everyone has a nice street where they can park their beat-up old truck while they try and put their life back together. And sometimes, even when they do, people are just too ashamed to ask for help.

When that happens, I'm grateful for people like you who are willing to step in and help.

I think it's admirable what my neighbors did, helping their son like that. And I think it's downright incredible to see people like you offer that same help to complete strangers.

Through your support of the Human Fund, you're providing hope and access to job critical programs like job placement services, transportation, nutritious meals and so much more.

You don't do it for the recognition. You don't do it because they're your kids - you do it because they are *someone's* kids. And they need help.

Holly and Nic, we started the Human Fund because there are people who really need our help and have nowhere else to turn. <INSERT SEGMENTED ASK TEXT HERE>

Thank you for serving as a lifeline and helping others when they have nowhere else to turn. I am blessed that I get to work with incredible people like you each and every day, and I appreciate all the help that you provide.

It is also my job to make sure that gifts from our supporters like you are used well, and with 100% transparency. So please call, text or email me if you have questions, or want to know more about the people that we help. My mobile number is 555-867-3309 and my email address is firstname@thehumanfund.org.

Gratefully,

Donna D. Velopment
Director

44

Holly and Nic, we started the Human Fund because there are people who really need our help and have nowhere else to turn. <INSERT SEGMENTED ASK TEXT HERE>

Major donor segment



I want you to know that you are one of our most generous donors, and I am so grateful for your generosity. Thank you for including us in your charitable giving, year after year.

45

Holly and Nic, we started the Human Fund because there are people who really need our help and have nowhere else to turn. <INSERT SEGMENTED ASK TEXT HERE>

Current members of a giving society



As a member of our Giving Society, **YOU** are the reason we are able to provide help to those who need it most. Thank you for renewing your annual membership with a gift of <\$X,XXX>.

46

Holly and Nic, we started the Human Fund because there are people who really need our help and have nowhere else to turn. <INSERT SEGMENTED ASK TEXT HERE>

Lapsed members of a giving society



As past member of our Giving Society, you know how much we rely on private donations to help to those who need it most. Our Giving Society consists of 385 families just like yours - will you rejoin us this year with a gift of <\$X,XXX>?

47

Holly and Nic, we started the Human Fund because there are people who really need our help and have nowhere else to turn. <INSERT SEGMENTED ASK TEXT HERE>

Prospective members of a giving society



You've been such a strong supporter of our work. Would you consider joining our Giving Society this year? The Giving Society consists of 385 families who donate <\$X,XXX> each year to the Human Fund. Will you join us?

48

Holly and Nic, we started the Human Fund because there are people who really need our help and have nowhere else to turn. <INSERT SEGMENTED ASK TEXT HERE>

Recent new donor



I believe you recently made your first gift to our organization – thank you! Can we count on your support again for this appeal? Every dollar you donate will go directly to help families in need.

49

Holly and Nic, we started the Human Fund because there are people who really need our help and have nowhere else to turn. <INSERT SEGMENTED ASK TEXT HERE>

Fundraising event attendee



I saw that you recently joined us at our gala event – thank you! I'm writing now to ask if you'll join the thousands of families who make an annual gift to support our work. Every dollar you donate will go directly to help families in need.

50

Holly and Nic, we started the Human Fund because there are people who really need our help and have nowhere else to turn. <INSERT SEGMENTED ASK TEXT HERE>

Prospective recurring giver



A monthly gift of \$10 or \$20 will go a long way to helping families in need.

51

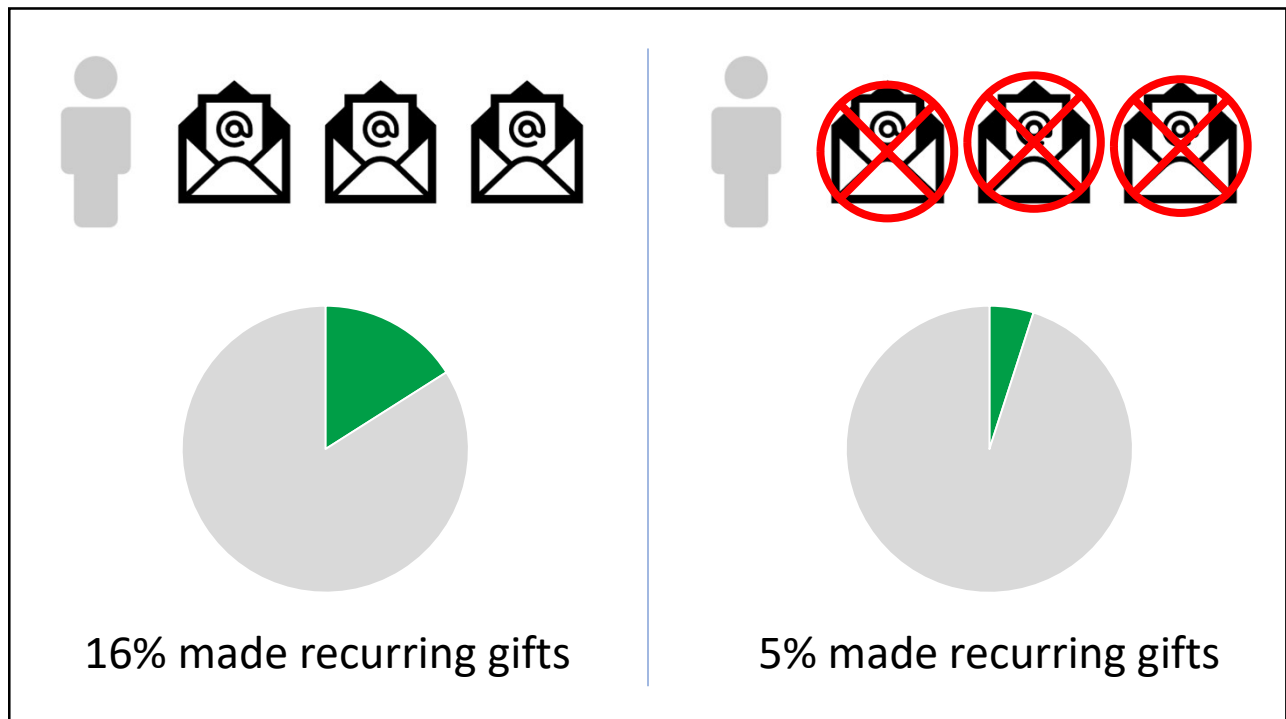
The fundraising email

52

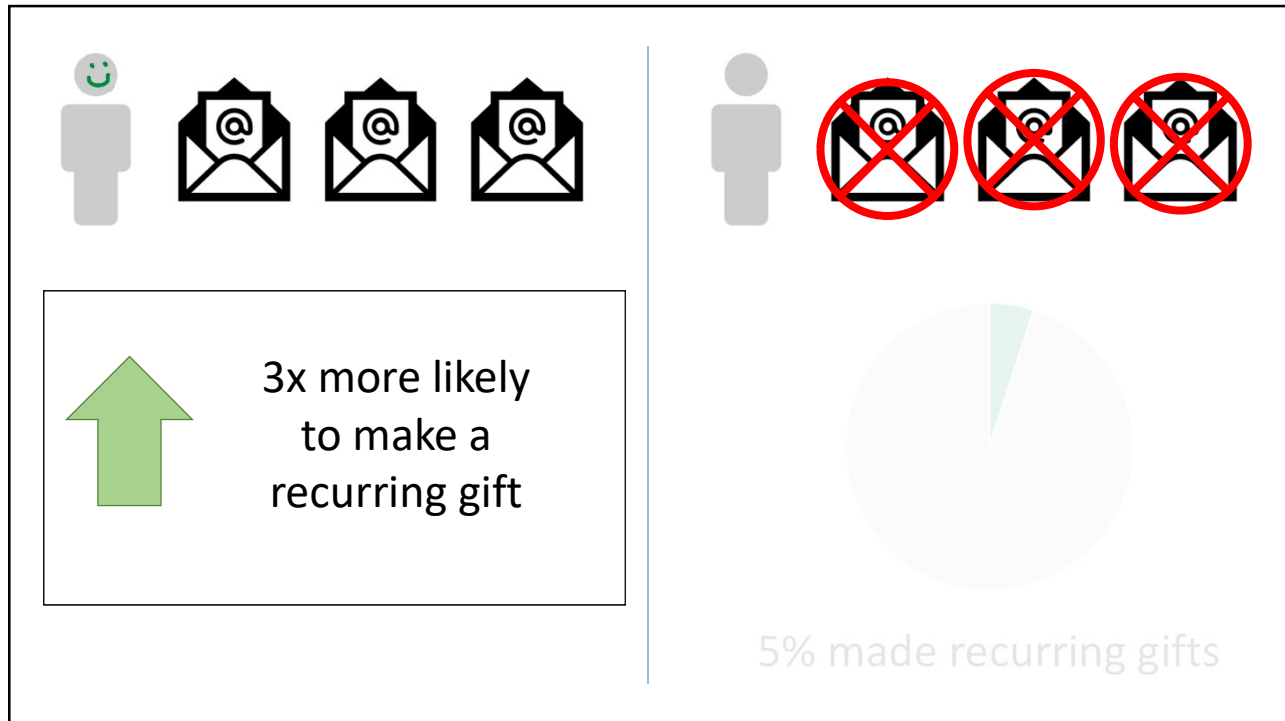
Are email recipients
more likely to make recurring gifts?

.|PSG

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54



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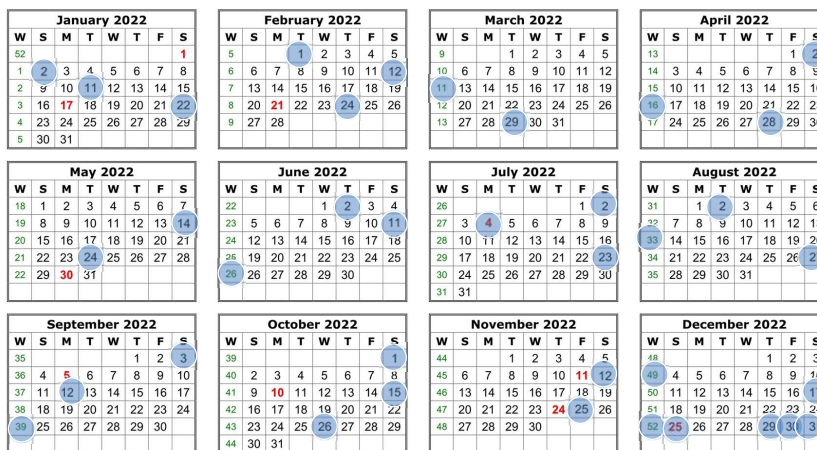
Email your donors **a lot more often**



- Personal, heartfelt emails
- From a real person
- No photos or graphics
- Don't hyperlink – use raw URLs
- 8:1 nourishment ratio

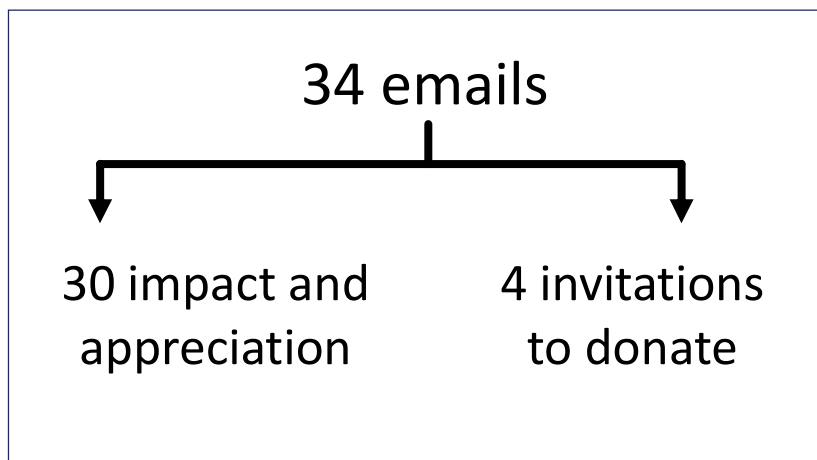
56

Email your donors **a lot more often**



57

Email your donors **a lot more often**



58

Solicitation emails

Use the phrase *“many donors have asked me about how to give online...so I wanted to share this link with you...”*

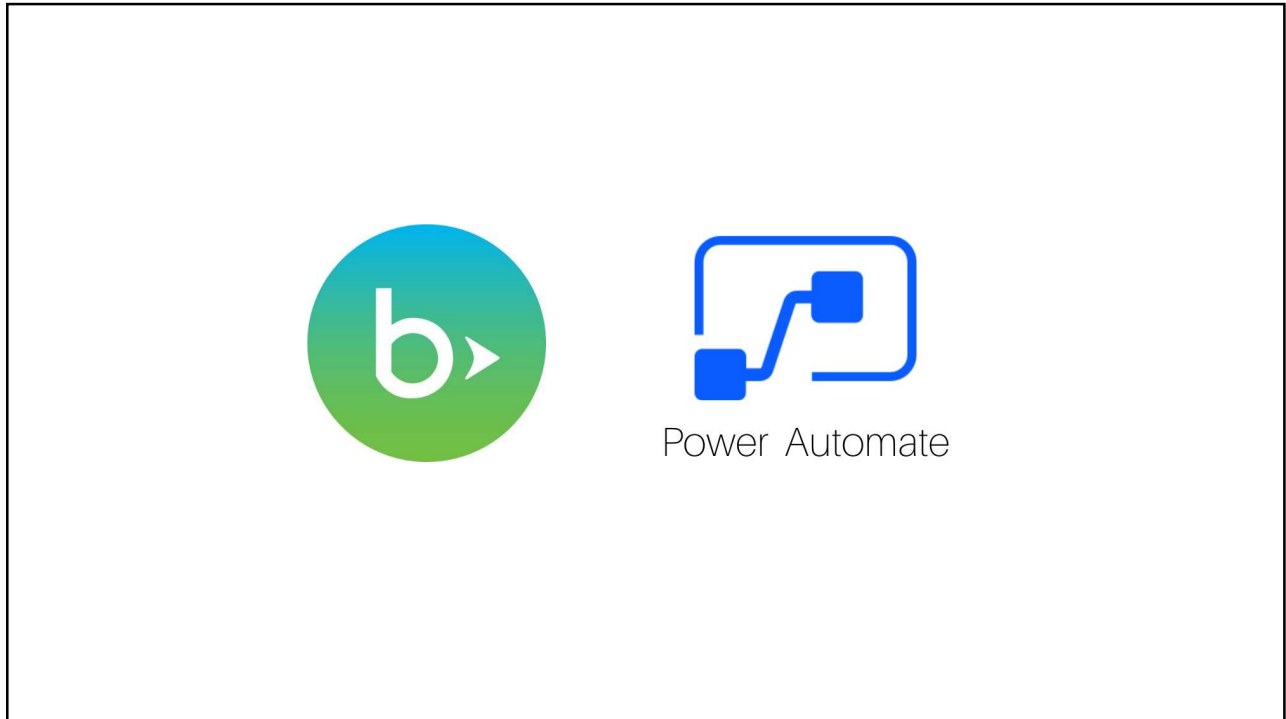
[then provide a link to a *segmented* donation page]

59

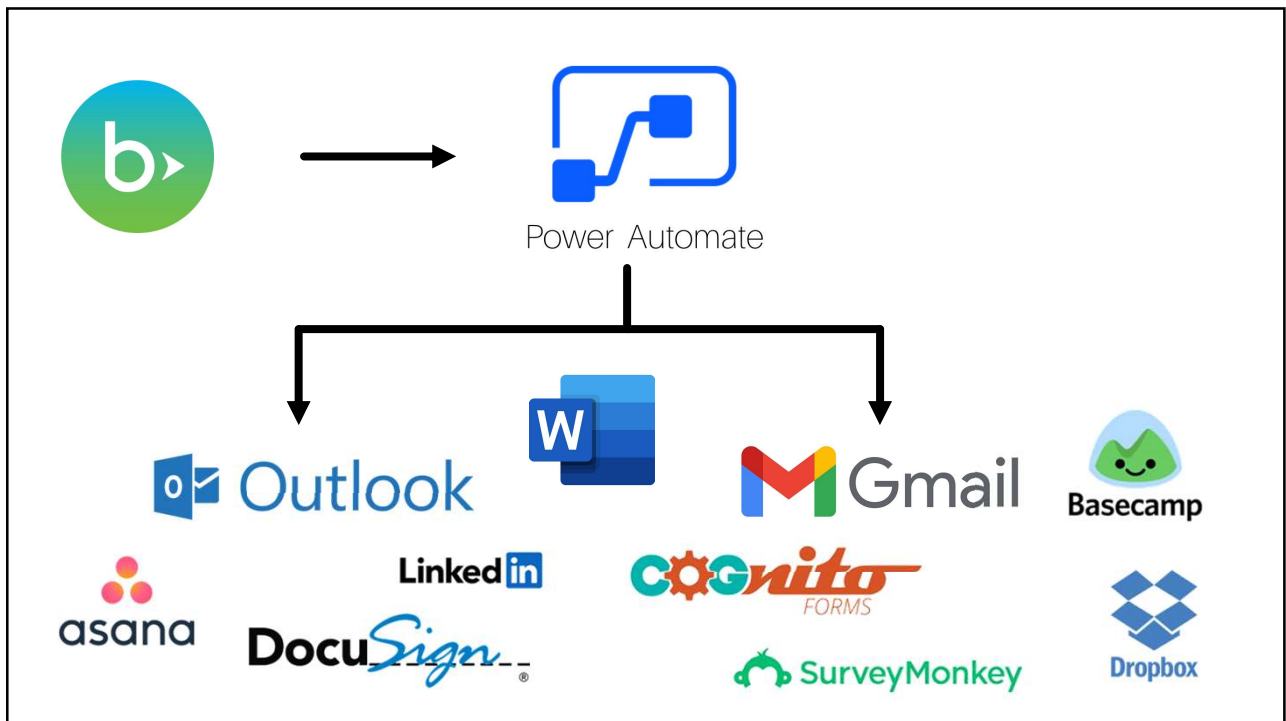
Fundraising automation

PSG

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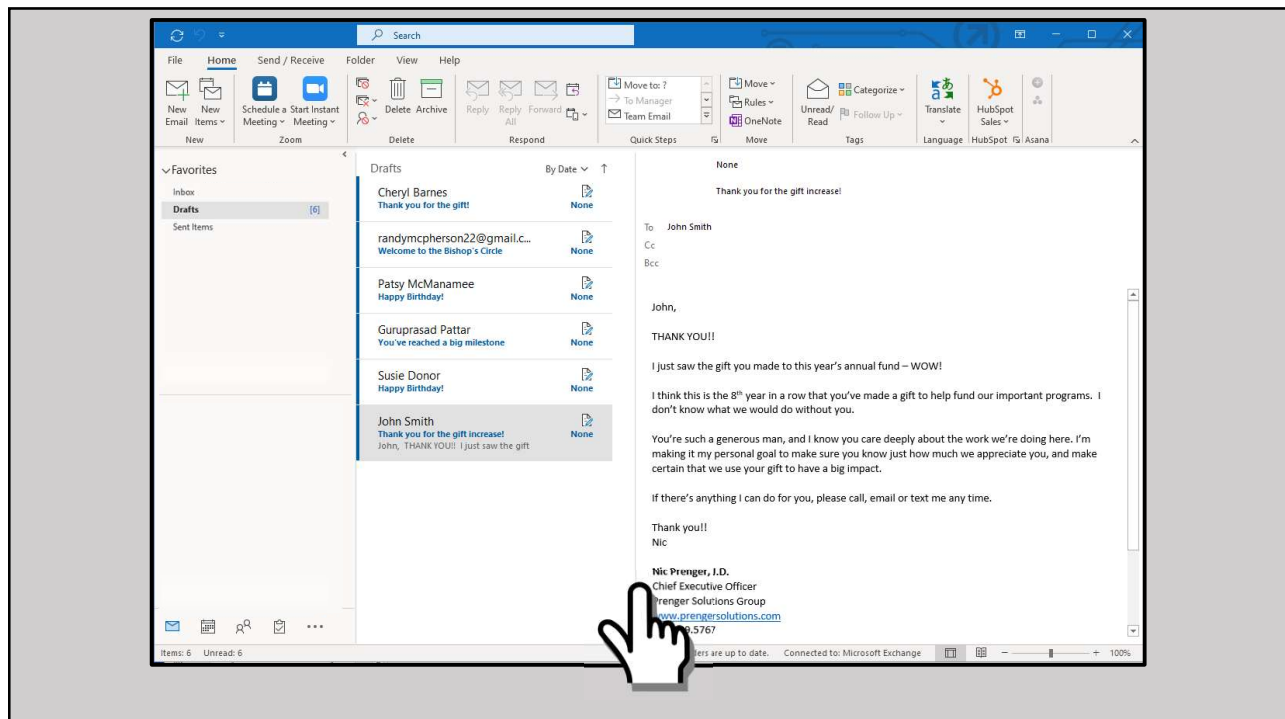


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Using automation to solicit recurring gifts



63



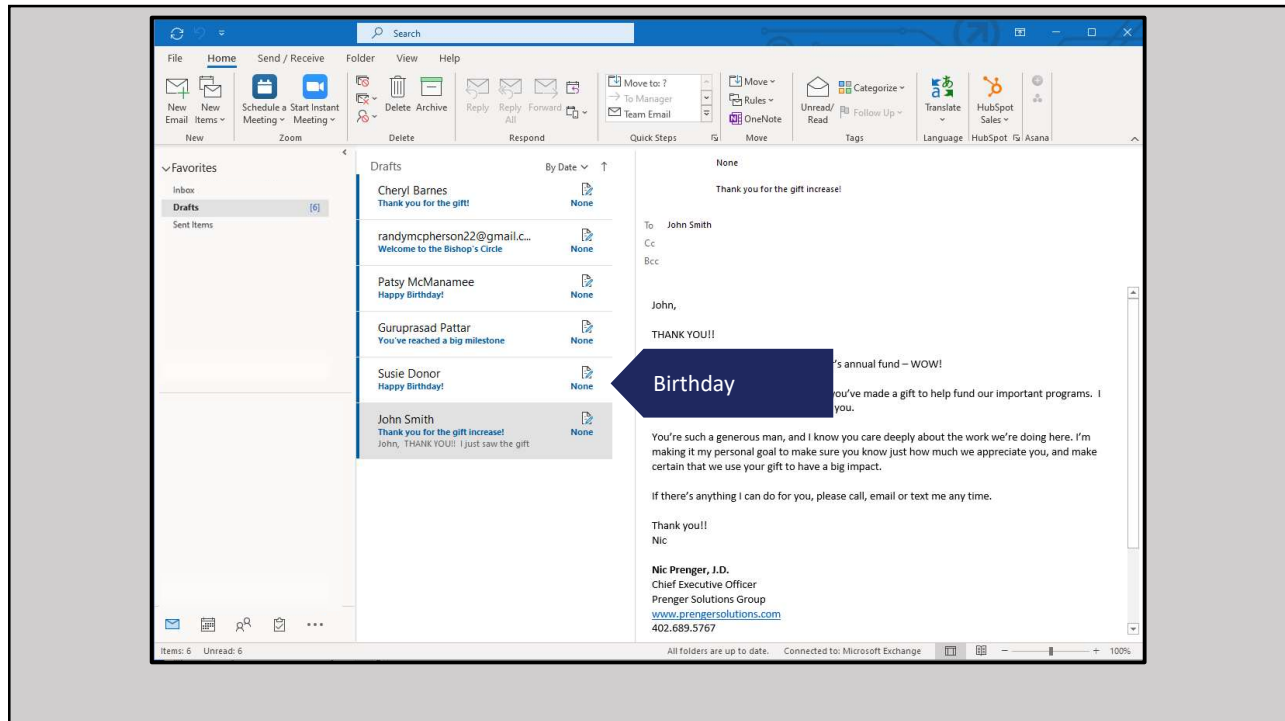
64

5 drafts, every morning

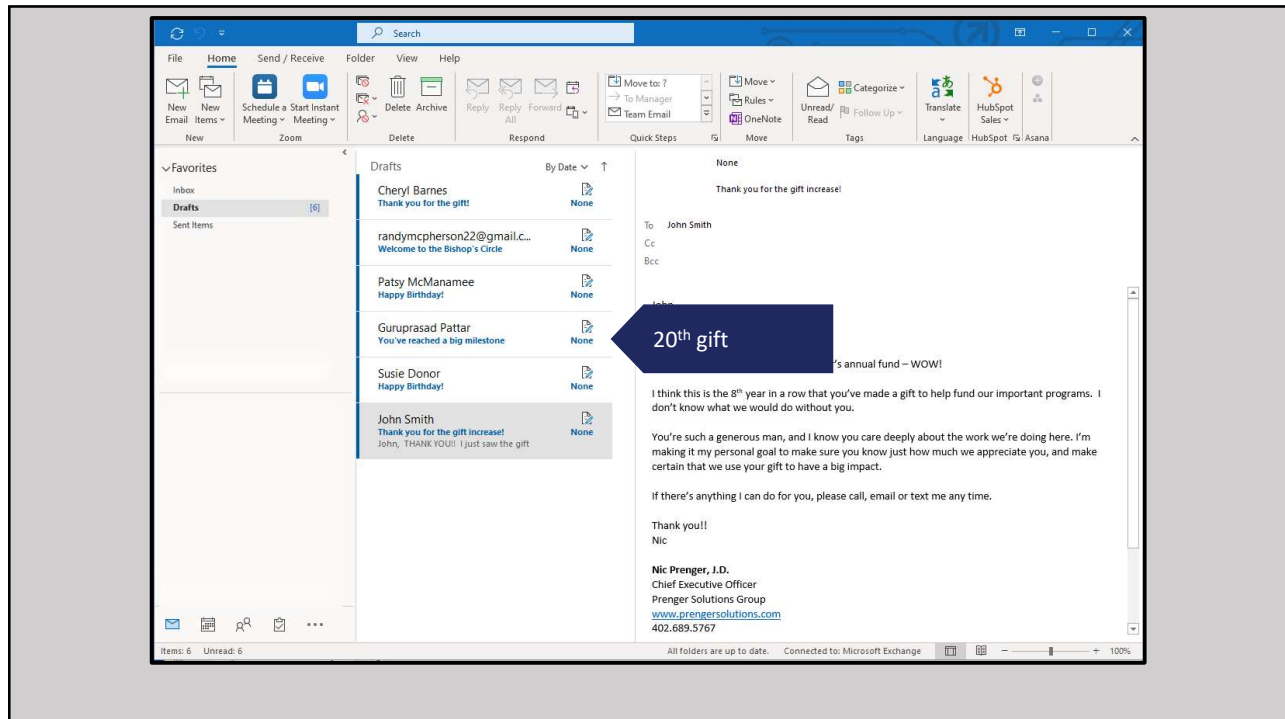
1. Click on a draft email
2. Delete if not a good fit
3. Personalize the message
4. Click and send

65

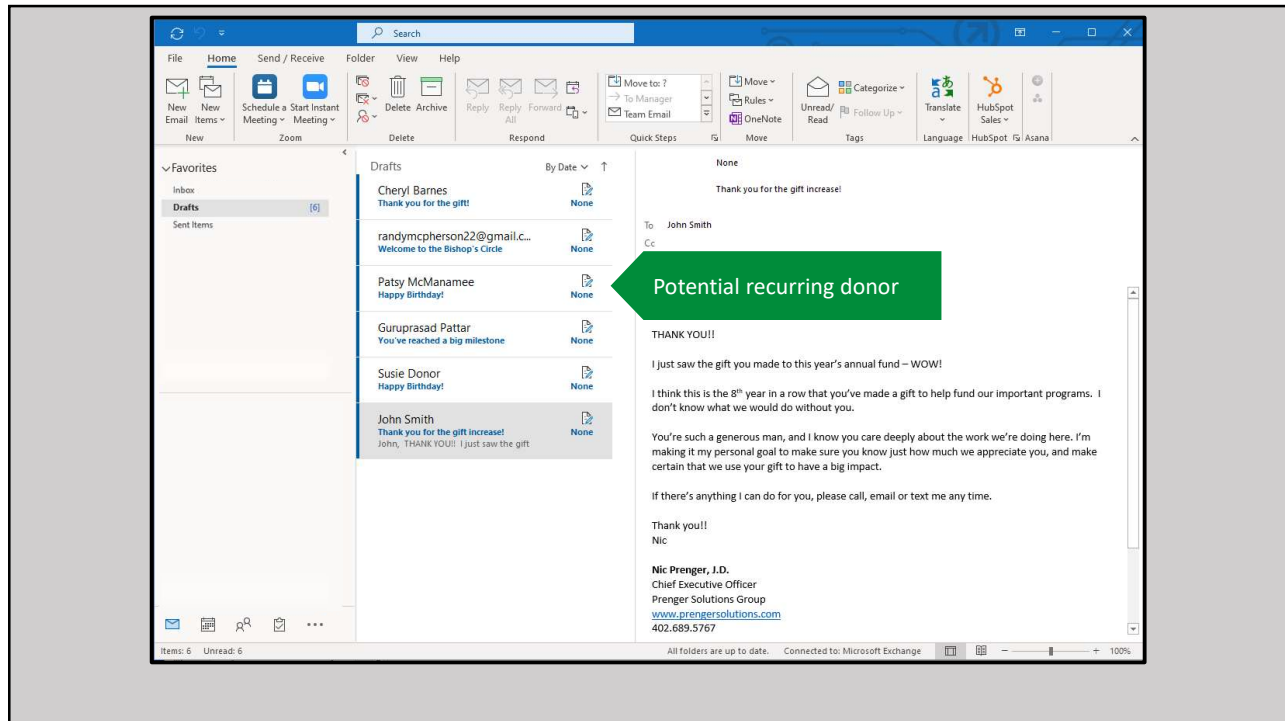
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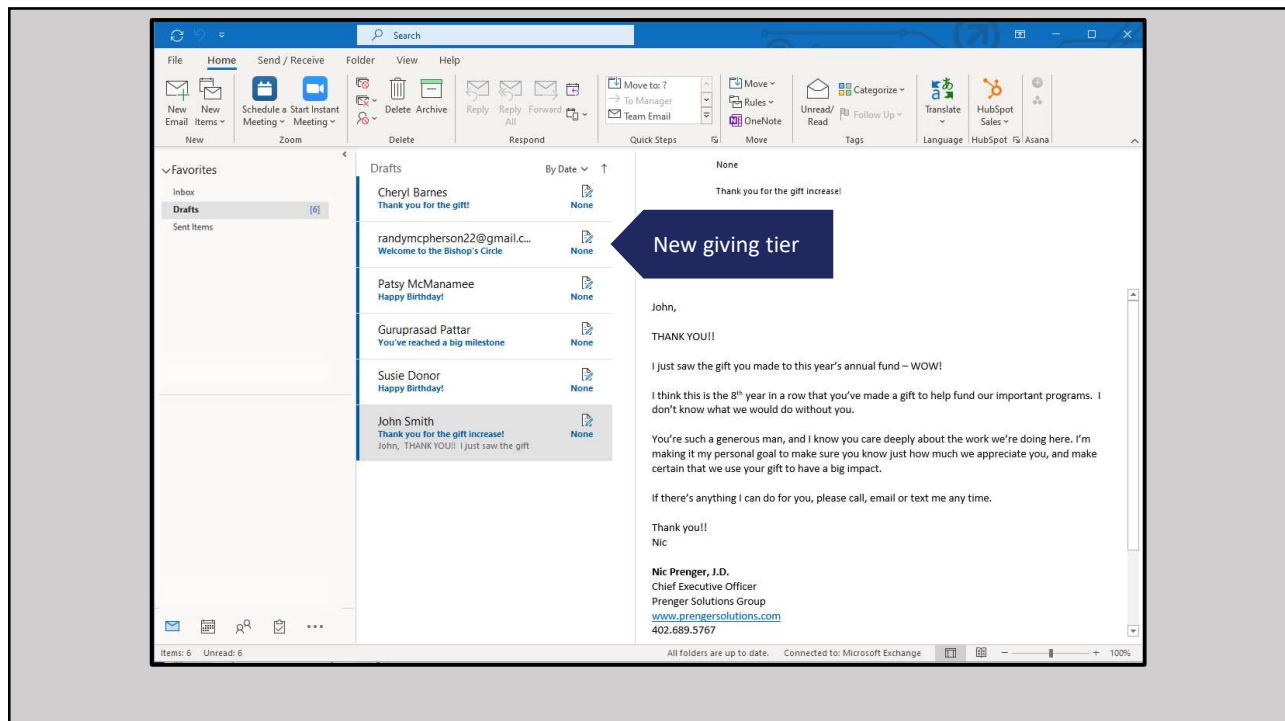
67



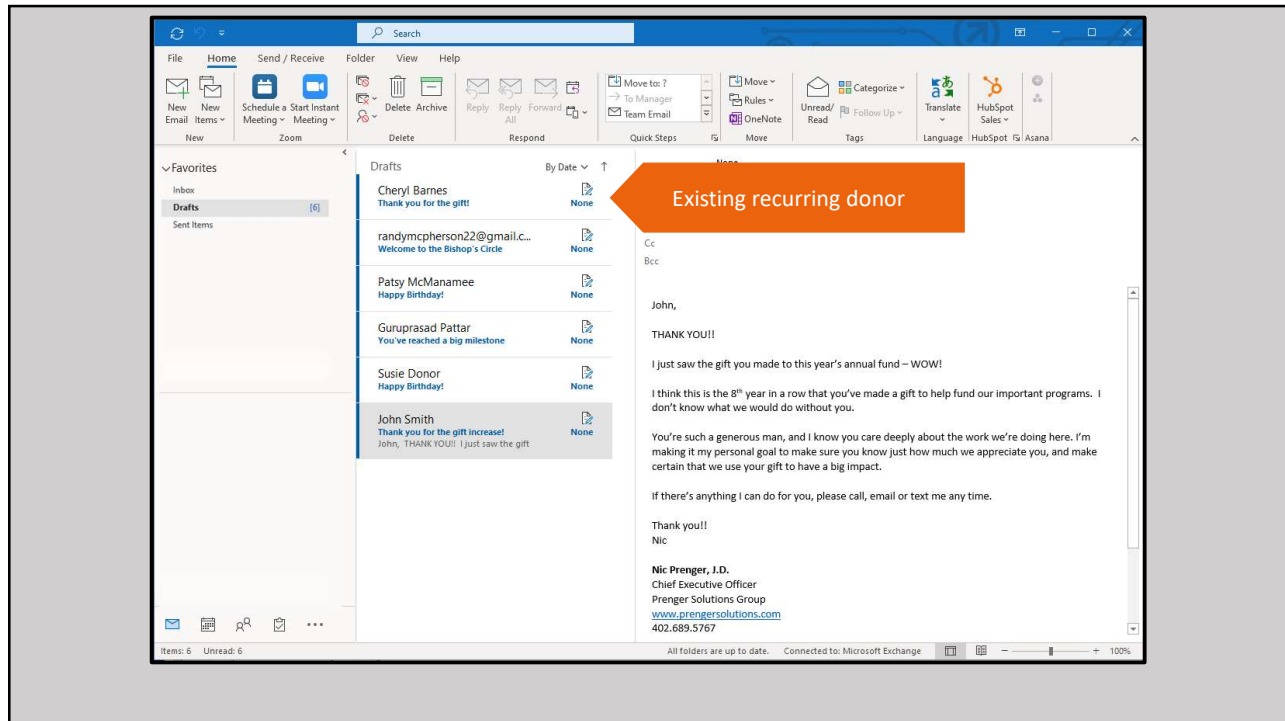
68



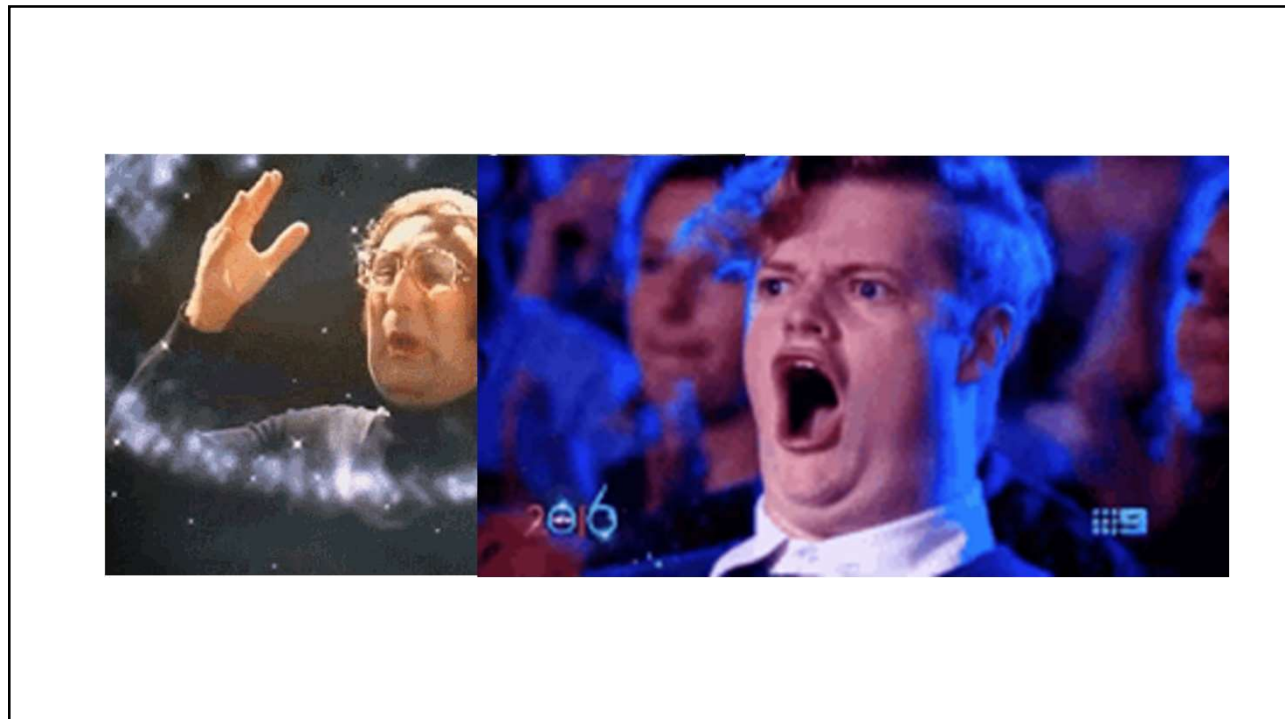
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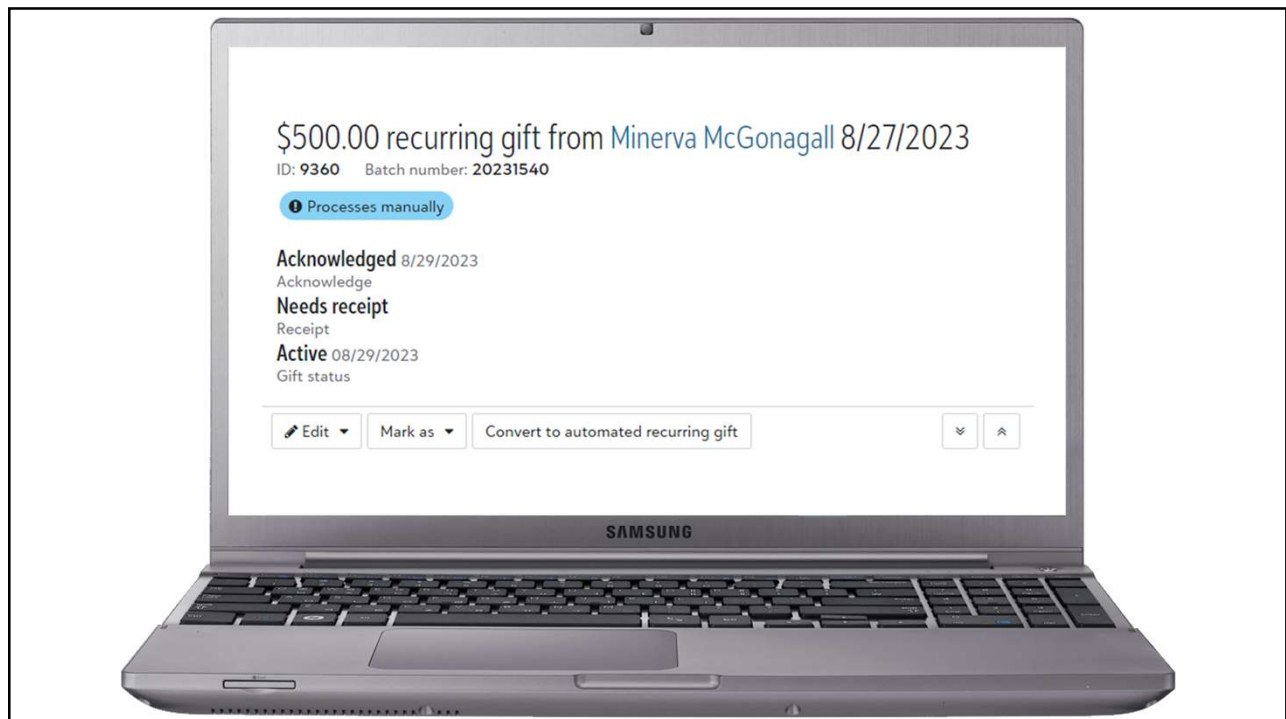


72

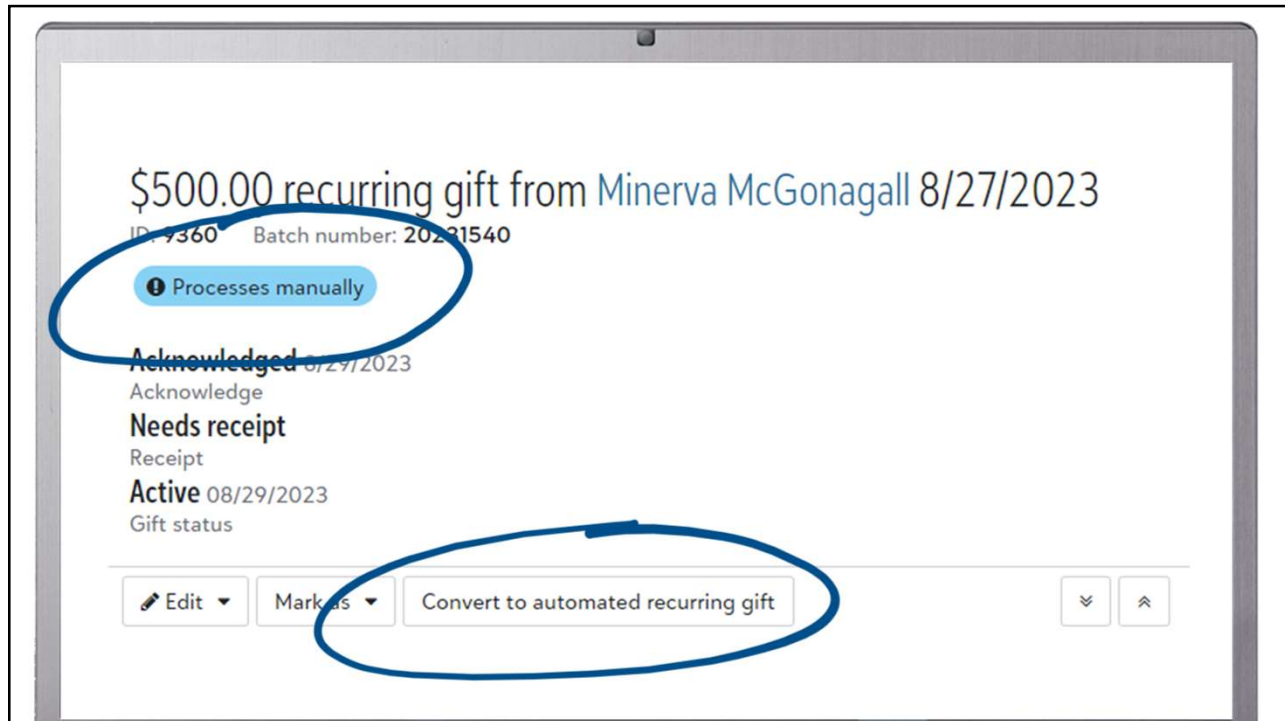
Using automation to process recurring gifts



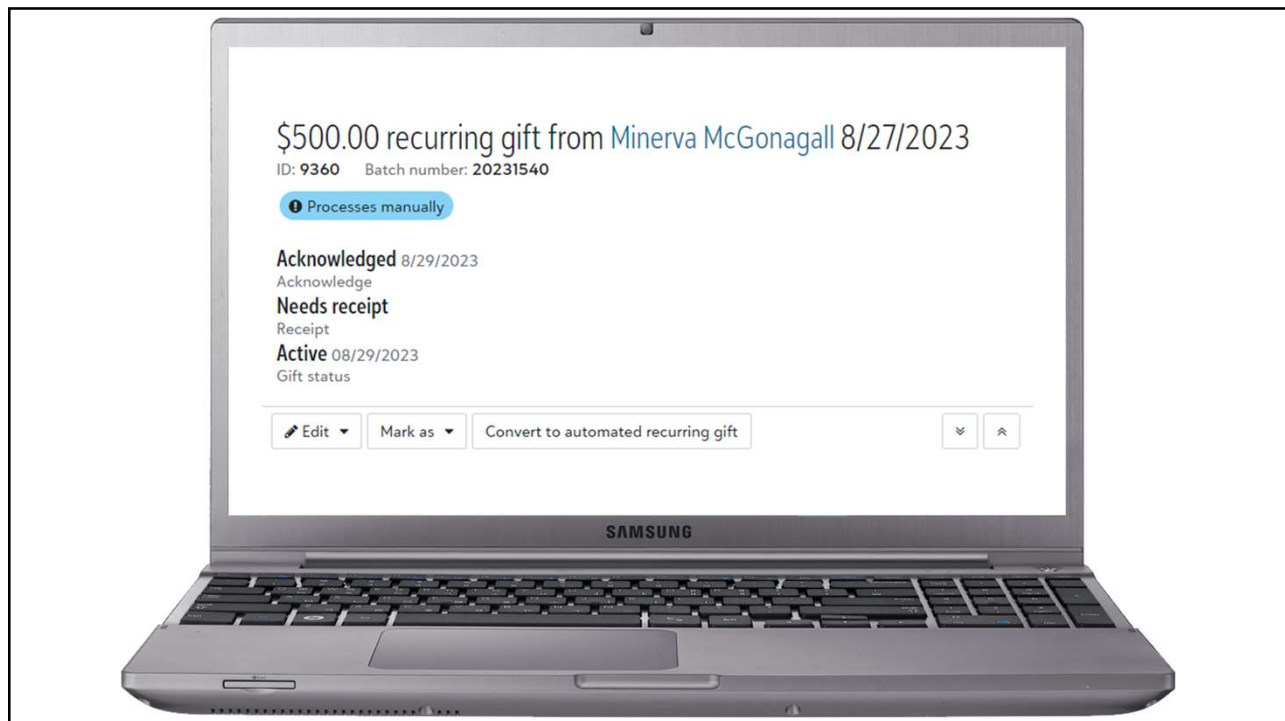
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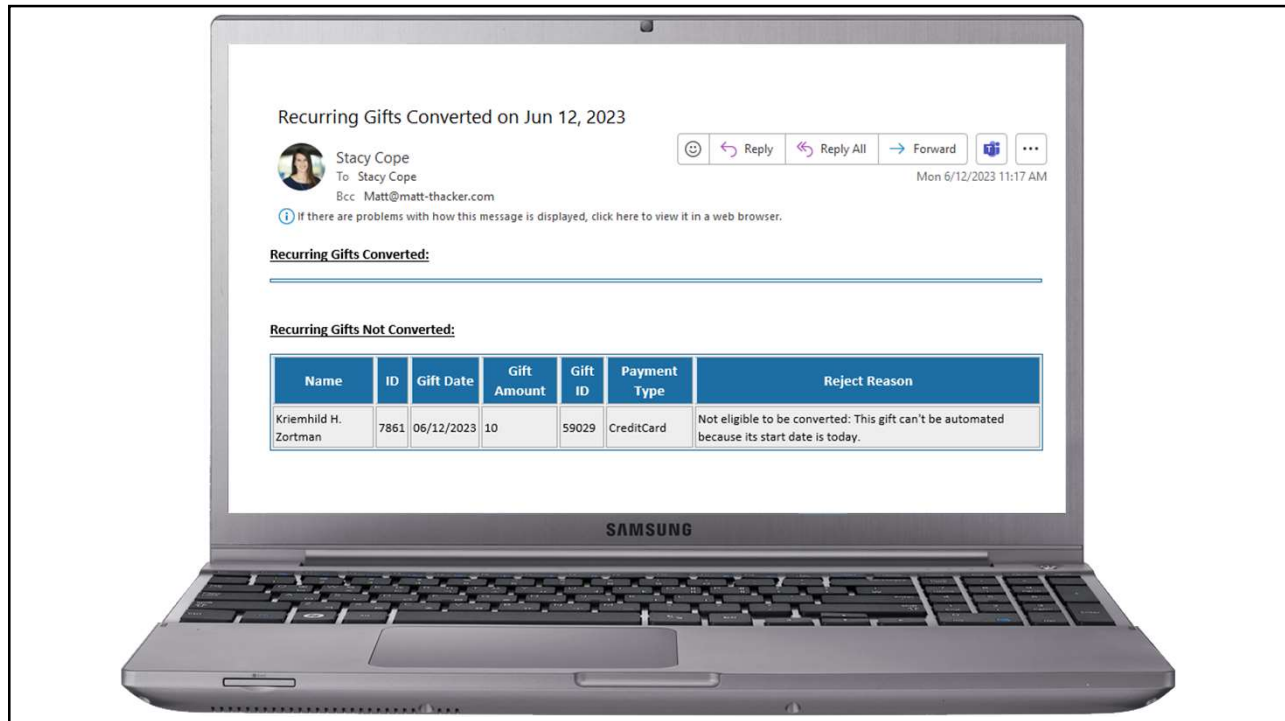
74



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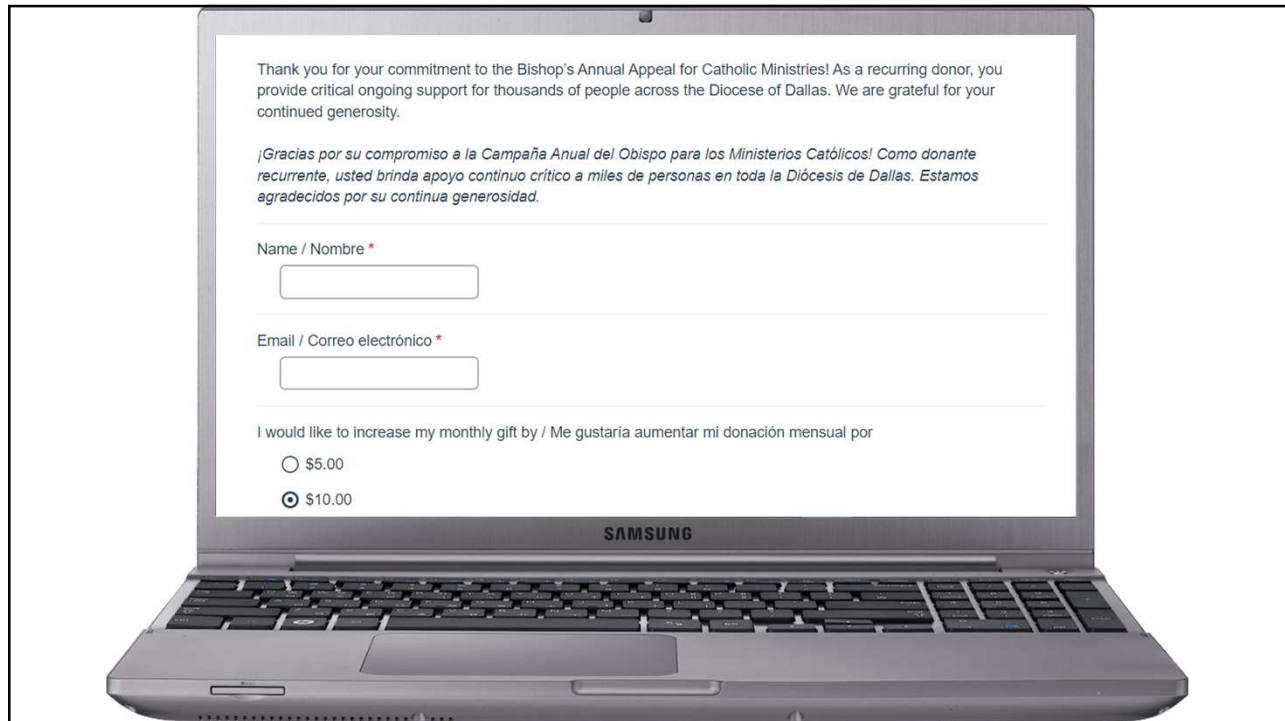


77

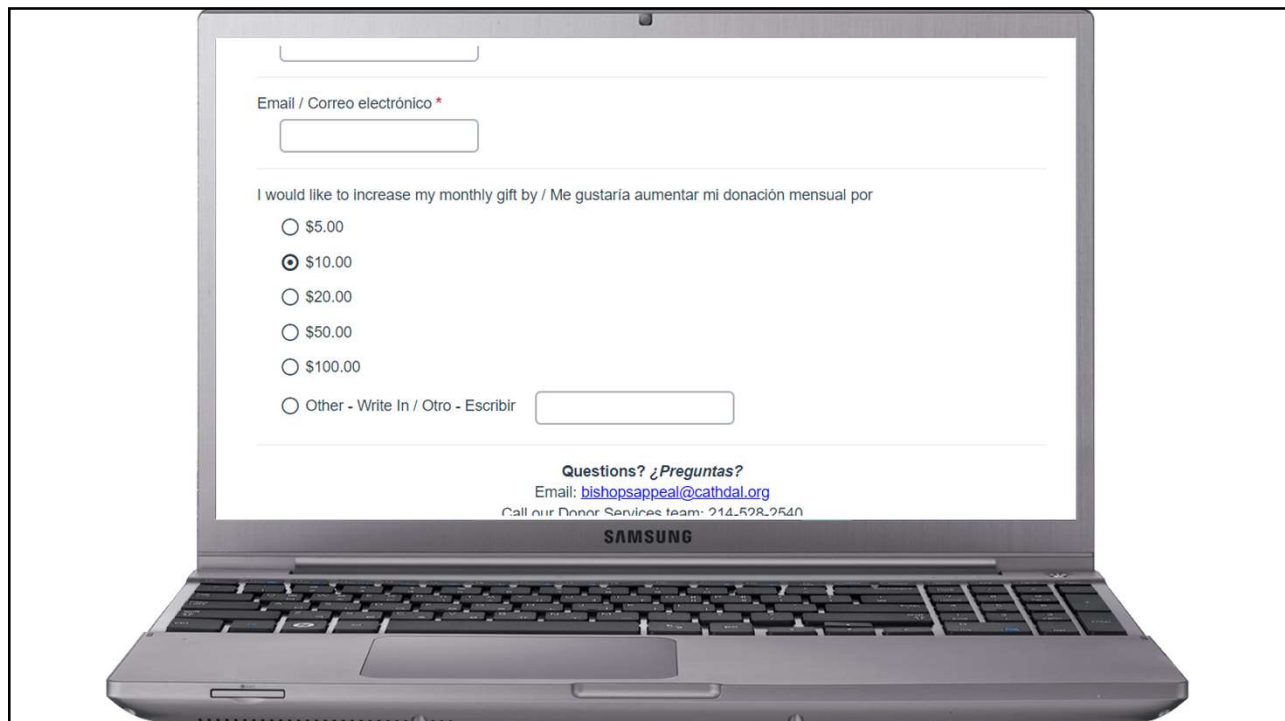
Using automation to **increase** recurring gifts



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• WEBINAR

Tips and Hacks for Creating Reports and Dashboards in Raiser's Edge

PSG
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September 10
1:00 pm CT

Hosted by: Rob Simms, Austen Brown,
Nic Prenger & Stacy Cope

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AUTOMATE GENIUS **ASK GENIUS** **PSG**
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PSG's 10-Minute **Insider's Guide to**
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September 12 | 11:00 am CT

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