

Pushpay.

### Recurring Giving Playbook

# Let's refine your recurring giving gameplan

Growing generosity doesn't happen without intention, and that's doubly true when it comes to recurring. But the effort is worth it: building a healthy group of donors committed to automated giving can boost donations, improve your parish's ability to forecast finances, and help givers step deeper into their faith.

This Recurring Giving Playbook is your leadership team's actionable stepby-step guide for elevating recurring giving to new heights, by implementing proven strategies that some of your most successful peers have relied on for years.

Inside you'll find the mindsets, strategies, and tools churches have used to skyrocket their recurring giving. And the best part is, you don't need months or years to leverage this playbook—you can start rolling out these concepts today!

### 20% higher-than-average share of recurring giving.



One in a local cluster of mid-sized parishes that elevates reach, connection, and community through technology.



Suburban church that relies on technology for building connections and generosity in their Catholic community.



Large middle-America parish that emphasizes dynamic innovation to support their future.



### Shepherd your donors

De-emphasize physical gifts and lead givers where you want them to go.

Physical gifts aren't going to completely disappear anytime soon. There are certain donors—especially among older generations—that simply won't abandon cash and check giving.

But digital recurring givers donate an average of 28% above and beyond their recurring gifts. That volume can't be ignored.

Getting someone new to engage with your church online (in any capacity!) is a step toward them becoming a recurring giver. While supporting physical donations shouldn't be completely ignored, moving parishioners toward digital should be emphasized and driven by highlighting all the ways donors and staff alike benefit from an online experience.

communicate how digital giving eases the burden on your team:

No parish wants their staff to struggle. When you speak about giving, be forthright and let everyone know how much time and effort is saved behind the scenes when donations are made digitally. You can even highlight specific examples of what your staff's accomplished when they're not stuck in the office.

Share other benefits of your custom app: Maybe a middle-aged couple is reluctant to give digitally—but when they hear about all the great content you're posting online, they finally decide to download the app. Suddenly, giving through their phone feels like a no-brainer.

Strength in numbers: The majority of your givers are already online—share this fact! Consider opening your giving moment by casually mentioning the percentage of donors who already use your digital tools. That figure will lend credibility to your online platform.

Make recurring the default option on your giving screen: No matter how clearly and often you speak to recurring's importance for your ministry, and even though it's clearly an option on your giving screen, you'd be surprised how many people simply forget or skip over this option. By making it the default giving option in your app, you're actively encouraging donors to use this option.

You know that online giving—and especially recurring—creates a better experience for your donors and your leadership team. But some of your parish doesn't understand that dynamic yet, so instead of telling them to dive in head first, lead them there slowly.



"Using Pushpay, there is a builtin 'ask' in the software that is regularly prompting people to move to a recurring gift. We don't push recurring overtly, but we subtly encourage people to consider making this commitment."

**PARISH** 



"We have QR codes posted in the bulletin and in the church for direct access to our giving page, where people can easily [set up recurring]."





## Invite them into your story

Recurring giving is a byproduct of emotional and spiritual investment.

A lot is said about an individual's journey, in their faith and into the life of the Church—and an alternative way to think of a journey is as a story.

Your parish has a story, which has been molded by the people who've committed themselves to your ministry. But that commitment doesn't happen overnight. If a person or family isn't signed up for recurring giving, it's likely because their journey, their story, isn't yet entwined deeply with the story of your church.

To develop recurring givers, work with intention to bring those people into the story of your parish.

### **Explore an individual's hurdles:**

When engaging one-on-one with a member who's not yet signed up for recurring giving, ask questions about their reluctance to take the next step. It shouldn't feel like pushing or prying; you're just seeking a better understanding of where they are in their journey.

Personalized messages
should be goal-oriented: Each
communication touchpoint
should be rooted in learning a
donor's story. Revisit your existing
message templates, and ensure
they feel like heartfelt invitations
to specific next steps, while also
helping you discover more about
the person behind the gifts.

Find an approach to analytics that works for you: People aren't just numbers on a screen, but understanding data is critical to better connection. If your recurring giving metrics aren't where you want them to be, consider reevaluating your church's approach to actionable analytics. Experiment with limiting or expanding the number of statistics you're placing emphasis on, or which giving red flags and bottlenecks you might have overlooked. Be sure you're optimizing your use of all the software workflow queues and donor development tools you have at your disposable—work smarter, not harder!

Most of us automate the financial obligations that are most important in our lives. Car payments, phone and electric bills, rent or mortgage—these are all set to autopay. Once a member of your community is fully entwined in the story of your parish—and your parish is embedded in their life story—they'll race to use recurring giving.

PARISH C

"We talk about time, talent and treasure in all messaging, and mention the church budget is entirely based on donations from parishioners and other community supporters."



"One of our subtle language items is instead of using the word 'gift' or 'donation,' we try to use the word 'investment.' We are asking people to invest in our church and the good works we are accomplishing in the name of the Lord."





### Spread the word

Communicate the value of recurring to make your church's vision a reality.

Every parish has goals. Community buy-in is what makes them a reality, be it in six weeks, six months, or six years.

But painting a picture of your envisioned future is just the first step toward engaging and exciting your congregation. Being of the same mind isn't enough: Everyone needs to agree on how you're going to get there. And recurring giving is one of your ministry's most powerful tools for paving the way forward.

Don't let the value of recurring get lost in translation. Take active steps to ensure all leaders, staff, and volunteers understand how your parish has chosen to communicate about recurring.

Ensure consistent messaging across the board: Even the best communicators—and often, especially the best communicators—go off-script, and might relay a concept or idea that doesn't gel with your fine-tuned messaging strategy. Emphasize the importance of sticking with a unified message.

Utilize campaigns to reignite passion: The next time you launch a major fundraising campaign that's sure to engage a significant portion of the community, emphasize your software's ability to use recurring to donate their pledge incrementally over time. Besides the benefits for your team, you'll be showcasing how easy and stress-free recurring makes givers' lives.

**Choose your messengers** wisely: On the flip side of the coin, giving moments shouldn't always be presented by a pastor or rehearsed member of your team. Invite passionate, well-spoken members of the community who've embraced recurring to share their experience. That presentation could focus on their peace of mind, the value they know recurring adds for your staff, a project they've seen come to fruition, or any other topic that would resonate with your congregation. As mentioned earlier, your longtime donors are viewed as a trusted channel by newer members—amplify their voice!

The importance of having a single source of truth cannot be overstated. Everyone you trust to speak about recurring on behalf of your ministry needs messaging training.

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"When we made the decision to introduce Pushpay, we made sure our people realized the impact and ease of recurring. Today we have 80% of our parishioners on recurring, so it really helps with budgeting and cash flow."

PARISH A



"People need a little encouragement for the first gift. Once we have that first gift—and maybe it's not for the regular offertory, but for a drive or specific cause—people are then more likely to offer a regular recurring gift."





## Share the impact

You're doing everything right financially. Show them.

There's a lot of pessimism in today's world, not to mention economic hardship in communities across the country. Regardless of how worthy the cause, the thought that goes through most peoples' minds before committing their hard-earned funds is, "What's the result of this dollar?"

When someone's considering signing up for recurring, they're weighing the idea of continually committing funds. A single gift is one thing; a regular automated gift for years to come is a whole other beast. To take that next step, they need to trust the money's not being squandered.

The good news is that you, being a responsible steward, can easily put their minds at ease.

Live your commitment to fiscal responsibility: Sure, sometimes things go wrong and budgets are missed. But when you're able to consistently show—especially toward the end of the year—that leadership hasn't overstretched financially or needs to raise last-minute funds, you build trust that strengthens your church.

Open your books: No one's saying you should print out line-item copies for everyone who walks through your doors. But devise a format to converse honestly about finances that feels organic to your ministry. Maybe that's sharing high-level reports, holding open forums, or meeting with designated members of the parish on a regular basis.

### Abstain from discussing barriers:

Never frame communications about fundraising in a negative light. Tell people what you're spending money on, not what you would spend on if they only gave a little more.

Remember the power of wordof-mouth: Your long-time
members are a pocket of truth
for newcomers. When someone's
feeling out whether they want
to take financial next steps with
your church, they place faith in
the opinions of their more tenured
peers. As such, the trust you build
with parishioners by implementing
policies of openness and honesty
inevitably trickles through the
pews, and will result in a slow but
steady groundswell of generosity.

There's no single correct way to approach the concept of financial transparency. Chances are your leadership team will have different opinions on how to do so. The important thing, however, is that your community feels that you're being transparent. Achieve that, and they'll trust you with their recurring gifts.



### You can't start any sooner than right now.

The mission of your parish deserves to be brought to fruition. Recurring giving is an incredible avenue for getting you there, but leveraging its full potential in your community requires planning and intention.

Hopefully some of the strategies in this playbook are applicable to your situation, or have kickstarted a train of thought that will help you elevate recurring as soon as possible. If you'd like to discuss how Pushpay's tools can be further utilized to deliver results and drive recurring, schedule a software demo with a Pushpay expert, who will be happy to connect and discuss how we can help you achieve the mission of your parish.

Book a demo



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