

Diagnostic: Recurring Gifts

Read each of the following statements and rate your program according to the scale below. Don't spend too much time thinking about each statement; your first instinct is usually the best one. If you're not certain, make your best guess or go with your gut instinct. If you don't think it applies, or if you feel neutral about it, rate it as 3.

Strongly agree = 5 Agree = 4 Neutral = 3 Disagree = 2 Strongly disagree = 1

1	Recurring gifts are a core aspect of our annual giving strategy and are frequently used as a giving type by our donors.	
2	Our team has access to recurring gift expertise either within or outside of our organization.	
3	Recurring gift options have been implemented into all of our appeals and are being deployed by the appropriate staff/departments in order to best support annual giving efforts.	
4	We have clear and realistic goals when it comes to active recurring gifts.	
5	There is sufficient technology in place to support our recurring gift efforts.	
6	Our institution has a process in place to identify prospective recurring gift donors.	
7	An upgrade strategy exists for those who have been giving a recurring gift over an extended amount of time.	
8	Compelling messaging and branding efforts currently exist to promote our recurring gift efforts.	
9	The gift processing staff has been fully involved in the discussion about promoting, securing and maintaining recurring gifts.	
10	The benefits of a strong recurring gift program are well understood and have been communicated appropriately to those in leadership positions.	
11	Recurring gifts are being utilized with current faculty and staff through the use of monthly payroll deductions.	
12	There is a documented calendar of recurring gift appeals that is updated regularly and shared with relevant staff and volunteers throughout the year.	
13	Recurring gift options are available for all giving opportunities including giving day appeals and crowdfunding projects.	
14	A good process exists for initially acknowledging a new recurring gift.	
15	Recurring gift donors receive consistent communications about the impact of their contributions.	
16	There is a system in place to contact recurring gift donors whose credit card is set to expire or has recently expired.	

Diagnostic: Recurring Gifts (con't)

17	Recurring gift results are carefully analyzed and shared regularly.	
18	The cost of implementing and maintaining recurring gifts is understood and discussed annually in the budgeting process.	
19	Our donor retention rates are being positively impacted by an increase in recurring gifts.	
20	Peer networks play an important role in helping our team stay on top of best practices in recurring gifts.	

Total: _____