The Donor Retention Checklist

Donor retention is how you translate your nonprofit’s acquisition and conversion efforts into long-term revenue. Based on findings from our annual report, The State of Modern Philanthropy 2022, this checklist will help you nurture donors into life-long supporters by building relationships that last.

Step One: Engage Donors Before They’re Most Likely to Leave

It takes more time and resources to acquire a new donor than to keep one you already have. Be aware of donor churn trends to ensure you keep supporters coming back. The first month after a recurring gift, especially, will likely inform how long it’s retained.
The Donor Retention Checklist

☐ **Build a Proactive Nurture Strategy to Reduce the Risk of Churn**

☐ **Re-engage recurring donors within the first six months of their first gift**

☐ Personalize outreach in the weeks following a recurring gift

☐ Launch a monthly automated email campaign

☐ Invite new donors to an event to strengthen relationships

**DID YOU KNOW?** Following these proactive steps can help you mitigate early churn, as an average of 10% of recurring donors cancel gifts after one month, and 23% cancel by month six.

☐ **Mitigate the risk of losing supporters with regular outreach**

☐ Send handwritten cards to thank donors for their year-end support

☐ Host a special event in the new year to celebrate your donors’ generosity

☐ Incentivize one-time donors to give recurring gifts

☐ Reiterate the value donations have on your community and beneficiaries

**DID YOU KNOW?** Monthly recurring donors are 1.4x more likely to churn in January than any other month, so a thoughtful stewardship strategy can help you inspire them to stay connected in the new year.
Step Two: Segment Your Retention Strategy by Campaign

Leverage the benefits of different campaign types to keep donors excited about supporting your cause.

☐ Keep Post-Event Momentum Rolling With Additional Ways to Get Involved
  ☐ Repromote photos from past events to build excitement
  ☐ Recognize and thank major donors during and after an event
  ☐ Encourage attendee fundraising through personal fundraising pages

[DID YOU KNOW?] Ticketed events constitute 5.7% of donations above $1,000 but have the highest churn rates for recurring gifts.

☐ Optimize Donation Pages to Convert Returning Donor Traffic
  ☐ Design a user-friendly donation website with a streamlined checkout flow
  ☐ Share the value of recurring giving on each page to entice sustained giving

[DID YOU KNOW?] When a donor made a second donation in 2021, either to the same organization or a new one, 60% did so through a donation page.

☐ Make it easy to donate regularly with flexible payment options
  ☐ Send personalized receipts to each donor to ensure they feel appreciated

☐ Promote Peer-to-Peer Fundraising as an Accessible Way to Remain Engaged
  ☐ Let donors fundraise to raise money for financial flexiblity
  ☐ Designate a group of employees or volunteers to keep fundraisers motivated
  ☐ Make it simple for fundraisers to share on social and reach goals

[DID YOU KNOW?] Campaigns with peer-to-peer raise 3.8x more on average compared to all other time-based campaigns.
Step Three: Entice Donors to Stay

Get ahead of times when donors are most likely to cancel gifts by proactively offering a stellar giving experience.

- **Promote Easy, Affordable Recurring Giving Options**
  - Use storytelling and visuals to show the impact of consistent gifts
  - Give donors the ability to easily update their giving frequencies
  - Encourage annual donors to give small, frequent donations
  - Invite monthly donors to increase their recurring gift amounts
  
  **DID YOU KNOW?** Among different giving frequencies, recurring gifts donated at a monthly frequency have the highest retention rate.

- **Make Repeat Transactions Seamless With the Right Payment Options**
  - Present a pop-up payment form on your website to greet returning visitors
  - Offer ACH (bank transfer) to reduce outdated credit card risks
  - Incorporate mobile-first payments like PayPal, Venmo, and cryptocurrency
  - Track which payments lead to results for you, and highlight them
  
  **DID YOU KNOW?** The size of a recurring donation is 29% larger on average when made through ACH (bank transfer).
The State of Modern Philanthropy 2022: The Path to Lasting Donor Connections

Explore *The State of Modern Philanthropy 2022* for a deeper dive into our findings on what makes for successful donor acquisition, conversion, and retention efforts.