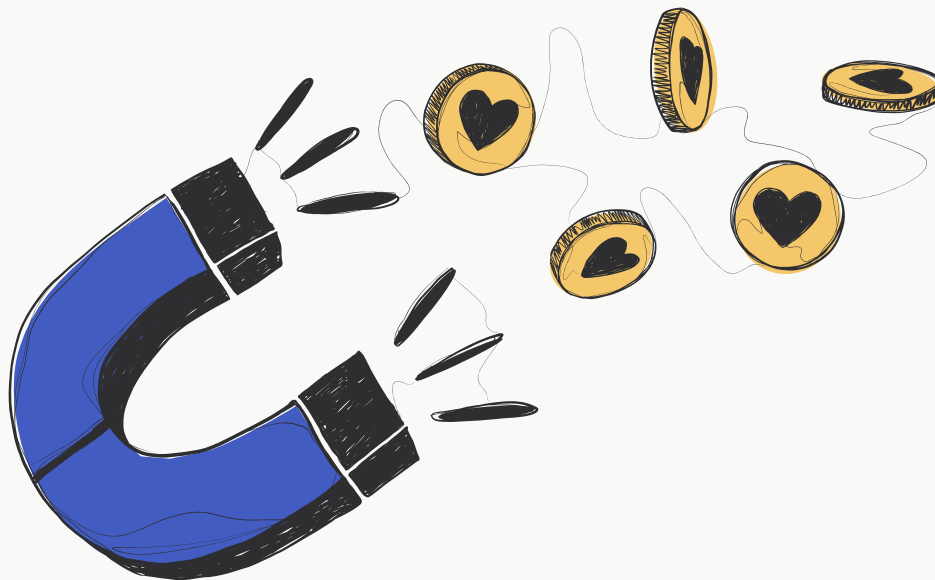


The Donor Retention Checklist

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 flexibility
- 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.

