

# Migration Without Disruption

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How to Upgrade Fundraising  
Platforms with Less Risk to  
Retention and Revenue

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# Balancing Innovation and Risk in Fundraising Technology

Nonprofit organizations are continuously reevaluating their digital fundraising platforms to improve donor engagement and operational efficiency. However, migrating to a new fundraising system – especially when recurring donors, also known as sustainers, are involved – carries risks that must be managed with care. This whitepaper provides a deep dive into the best practices for integrating constituent relationship management (CRM) systems with fundraising tools, strategies for safely transitioning recurring donor payment data, and tactics to optimize donor engagement after platform migration. It also highlights relevant nonprofit technology trends influencing engagement and fundraising. The goal is to arm nonprofit decision-makers with research-backed insights and actionable recommendations for a successful platform transition and improved long-term fundraising outcomes..

## Understanding the Stakes: Donor Retention and Migration Risks

Donor retention has been a persistent challenge in the nonprofit sector, and is becoming increasingly important as economic uncertainty continues year-after-year. [The Nonprofit Recurring Giving Benchmark Study](#) shows that fewer than half of donors give again year-over-year – the overall donor retention rate averages around **40–45%**. First-time donors are the least likely to return; only about **18–23%** of new donors are typically retained into the next year. Even repeat donors (those who have given more than once in the past) see retention rates of roughly 60%. These statistics highlight the challenge nonprofits face: without an intentional strategy, organizations could lose more donors than they retain annually.

Sustainer programs (recurring giving programs) offer a promising solution. Recurring donors contribute reliable income and exhibit significantly higher retention than one-time donors. For example, monthly donors have about a **90%** retention rate, far outpacing the **~46%** average for all donors. The [2024 M+R Benchmark](#) found about **63% of recurring donors were still giving 13 months later** (month-over-month retention for sustainers), compared to only 29% retention for one-time donors in the same period. This means that nonprofits should rely on a robust recurring giving program to dramatically improve long-term support and lifetime value of their donors. In fact, recurring donors are often said to be five times more valuable than one-time donors over their donor lifetime.

However, recurring donors come with their own risks during migration. Any disruption in processing can lead to significant revenue loss if payments are interrupted or mishandled. Industry analyses show that on average **2–3%** of recurring donors' payments fail each month, which can compound to **25–30%** of sustainer donors lost over a year if not addressed. Notably, about two-thirds of recurring gift cancellations happen automatically due to payment failures (e.g. declined cards), rather than the donor intentionally canceling their gift. This underscores that a large portion of sustainer attrition is preventable – it's a technical challenge rather than a loss of donor goodwill. Nonprofits need proactive strategies to address these risks through donor engagement, clear communication, and extensive migration planning.



# Children's Aid Foundation of Canada Retention focused Migration

Potential loss of recurring donors, an integral piece to fundraising strategy, was identified as a main risks of transition. Migrating recurring donors to a new platform is a common pain point for organizations—it is not as simple as uploading a data file to the new technology host. The process requires manual intervention, with donors needing to take specific steps to authorize and complete the transition.

Staff carefully prepared for the transition, revamping their recurring giving program, focusing on data hygiene, and developing an extensive and engaging communications plan to smooth donors' transition to the new platform.

Ongoing outreach guided these valuable supporters through the transition process. The legacy platform remained operational for nearly a year, allowing ample time for donors to switch.

Meticulous preparations and efforts paid off. The organization was able to retain 90% of its recurring donors, with 55% of those retained upgrading their monthly gift size during their time on Engaging Networks.

## Key Considerations when Migrating Your Fundraising Platforms

When migrating to a new fundraising platform, nonprofits must consider technology compatibility, payment continuity, and donor experience. Successful transitions begin with a structured evaluation of current systems and how data will be migrated to ensure no loss of donor records or payment details.

- **Evaluate Platform Functionality and Scalability:** Nonprofits often outgrow their platforms due to limited features or lack of integration capabilities. Before migrating, organizations should assess whether the new system offers the features they need to achieve their goals -- advanced segmentation, reporting, and automation tools to optimize donor engagement. Ensuring that the new platform can scale with the nonprofit's needs will reduce the likelihood of another migration in a few years.
- **Secure Recurring Donor Payments:** Given that recurring gifts form the backbone of sustainable nonprofit revenue, it is essential to migrate sustainer payment tokens correctly. Each payment gateway has its own tokenization format, meaning nonprofits must ensure the new platform supports seamless token transfer or retokenization without requiring donors to re-enter payment details. Failure to do so could result in lost donations and donor frustration.

- **Plan for a Data-Centric Transition:** The success of a migration depends on the accuracy and completeness of donor data. This means mapping out key data points—including donor history, transaction records, communication preferences, and engagement insights—and ensuring they are correctly transferred to the new system. Running parallel systems during the migration period can help validate the accuracy of data before fully switching over.
- **Prioritize Donor Communication:** Donors must be informed about upcoming changes, especially sustainers. Proactive communication ensures donors feel reassured that their contributions will continue without interruption. Personalized outreach via email, direct mail, and even phone calls for high-value donors can help retain trust and minimize churn.

## Best Practices for Integrating Your Fundraising Tools with Your CRM

A smooth integration between your nonprofit's CRM (donor database) and fundraising platforms is essential for effective donor management and engagement. When systems are siloed, staff may struggle with inconsistent information leading to a loss in efficiency. **The more integrated your nonprofit's software is, the easier it is to transfer data between solutions, saving time and reducing human error.**

Engaging Networks offers an all-in-one, integrated solution perfect for nonprofits looking for a seamless data-syncs with your database of record.

### Optimizing System Integration for Efficiency

Establishing a **single source of truth** is crucial. Commit to one centralized database for all donor information. All fundraising systems (donation forms, email records, advocacy tools, etc.) should feed data into the primary CRM to ensure you have a complete, up-to-date supporter record. Mapping and syncing key data fields is another priority—nonprofits should audit the data points collected by their fundraising platform (e.g., donation amounts, dates, campaign identifiers, donor contact info, communication preferences) and confirm that corresponding fields exist in the CRM.

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Additionally, nonprofits should automate processes wherever possible. CRM workflow tools can trigger personalized donor acknowledgments, fundraising reminders, and even automated lapsed donor outreach sequences. Ensuring that gift processing, donor communication, and campaign tracking flow seamlessly between systems enhances efficiency and ensures that no donor interaction is overlooked.

## The Role of Payment Processors in Sustainer Programs

Choosing the correct payment processor is essential for donor retention and recurring giving success. The right payment processor can ensure **reliable recurring transaction processing, and flexible payment options** that meet donor needs. Failed transactions are one of the leading causes of donor attrition, so selecting a gateway that minimizes errors and supports smooth payment processing is critical. This is the reason Engaging Networks offers 14 payment gateway options, now including Blackbaud Merchant Services, for nonprofits to use. If you're unsure which payment processor works best for your nonprofit, [we created a quiz to help with your decision.](#)

### Reducing Recurring Gift Failures

Timing is very important when initiating a new payment Processor. Avoiding major fundraising seasons and allowing enough time for the switch—typically five to six weeks—can help mitigate disruptions. Additionally, clear and proactive donor communication reassures sustainers that their giving will not be interrupted.

Once the migration is complete, nonprofits should **monitor payment success rates** to catch and resolve any processing issues early. A reacquisition strategy should also be in place to re-engage recently lapsed sustainers. By prioritizing security, reliability, and donor convenience, organizations can ensure a smooth transition that strengthens long-term donor relationships and financial stability.

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## Conclusion

Migrating to a new fundraising platform is a significant investment, but with careful planning and the right approach, nonprofits can enhance their donor relationships, improve operational efficiency, and future-proof their technology investments. By thoroughly evaluating current systems, prioritizing integration, ensuring seamless payment processing, and managing the transition with a structured approach, organizations can make the shift without compromising donor trust or revenue stability. Investing in the right technology today ensures a stronger, more sustainable future for nonprofit missions.

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engage their communities, and advance their missions. For over 20 years, we've powered tens of millions of donations from over 190 countries and raised over \$2 billion for social good. Engaging Networks is a flexible, completely customizable and innovative software platform for nonprofits. Request a demo to learn more about how we can help your organization. [Click here to learn more.](#)