

Donor Retention Rate Calculation Worksheet

One of the primary keys to fundraising success is donor retention. We must keep the donors that we work so hard to bring on board. As a first step to improving donor retention at your organization you need to calculate your current retention rate. This will serve as your baseline number to measure the effectiveness of your stewardship and donor cultivation activities.

Follow these simple steps to calculate your donor retention rate:

- 1) Pull a report for your database (or manually calculate) of all unique donors who gave two fiscal years ago (e.g. FY2017 if you are doing this calculation during FY2019). “Unique donors” means that you count each donor only once, regardless of how often they gave in a particular year.

of unique donors two fiscal years ago = _____

- 2) Pull a report of all unique donors who gave two fiscal years ago AND who gave again last fiscal year.

of unique donors who gave both two fiscal years ago AND last fiscal year = _____

- 3) Divide #2 by #1 and multiply by 100.

(_____ / _____) * 100 = _____ % donor retention