

betterworld

The nonprofit's guide to
switching fundraising platforms
without disrupting donations.



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Introduction.

90% of nonprofits use three or more core tech tools, while [57%](#) plan to add or replace at least one system within the next year.

As organizations grow, many reach a point where switching fundraising platforms becomes the next logical step. The main goal during any platform switch is donor continuity, keeping donations, recurring gifts, and donor relationships intact throughout the transition.

To help you switch fundraising platforms, here is a strategic plan to protect donors and gifts at each stage. We'll cover what to audit, how to handle data and recurring gifts, testing and timelines, plus a 30-day post-launch plan.

What nonprofits need to protect during a fundraising platform switch.

When moving to a new fundraising system, you must protect all critical components of your fundraising operation. In practice, that means carefully auditing and transferring everything from **donor and gift data to donation forms, campaigns, and integrations**.

Any gaps or errors could delay gifts or confuse donors. For context, around [54%](#) of nonprofits report incomplete or inaccurate data as a major obstacle, so data hygiene is crucial.

The table below highlights the key areas and why each matters:

Migration area	What to review	Why it matters
Donor data	Donor profiles (names, emails, addresses, IDs), tags, segments, giving history, communication preferences	Preserves complete donor records and enables accurate reporting.
Gift data	Donation records (amounts, dates, funds/campaigns, payment methods, receipts, refunds, soft credits)	Keeps financial records clean for accounting and tax reporting.
Recurring gifts	Active monthly donors, gift frequency, payment status, saved payment tokens	Protects predictable revenue streams; avoids donor churn.
Donation forms	Main giving page, monthly giving page, active campaign/event forms, ticketing/auction pages	Ensures donors can find and complete gifts without interruption.
Payment flows	One-time and recurring donations, credit card and ACH processing, donor-covered fees	Prevents launch-day failures; ensures smooth donor experience.
Integrations	Connected systems (CRM, email/email marketing, accounting/finance, reporting, events, automation)	Maintains critical workflows and up-to-date data across platforms.
Team readiness	Staff roles and permissions, reporting and data export processes, training needs	Empowers staff to use the new system confidently and accurately.
30-day review	Early performance metrics (gift volume, failed payments, receipt delivery, donor feedback, staff questions)	Catches any post-launch issues quickly so you can adjust.



How to switch fundraising platforms without disrupting donors?

Switching fundraising platforms? A clear plan can make the difference between a smooth transition and one that disrupts donors and donations.

Here are the key steps every nonprofit should take to protect donor relationships and keep fundraising running without interruption.

Start with a current platform audit.

Before doing anything else, understand exactly what exists today. A thorough audit of your current platform will guide the migration plan. Key audit areas include:

Audit the following:

- **Fundraising pages and campaigns**
List every active donation form, campaign, event, auction, crowdfunding, peer-to-peer, and monthly giving page. Identify which pages must remain live and which can be retired.
- **Donor and donation data**
Review donor profiles, contact details, tags, giving history, recurring gifts, offline donations, pledges, refunds, and communication preferences.
- **Reports and workflows**
Document the reports your team relies on, who uses them, staff permissions, and any internal processes tied to fundraising.
- **Integrations**
List every connected tool, including your CRM, email platform, accounting software, reporting tools, automation, event software, and any manual imports or exports.

The audit should produce a clear picture of the current setup in each area. This will reveal exactly what needs to be recreated, reconnected, or retired in the new platform.

Prepare donor and donation data.

Data migration is a big task, so clean up what you can before moving anything. Sort through donor and gift data carefully:

- **Donor data to review**
Check names, email addresses, phone numbers, mailing addresses, and unique IDs. Verify contact info is up-to-date. Review donor tags/segments and delete or merge confusing labels.
- **Donation data to review**
Inspect each gift record's details: donation amount, date, campaign or fund, payment method (credit card, ACH, etc.), and whether it's marked as recurring. Check donor-covered fees or in-kind information. Flag any offline donations or refunds. Ensure tax receipt info is complete for each gift.
- **Data cleanup tasks:**
 - I. **Duplicates** – Merge or remove duplicate donor records.
 - II. **Incomplete contacts** – Fill in missing emails/addresses where possible.
 - III. **Inconsistent names** – Standardize campaign or fund names used on gifts.
 - IV. **Old tags/segments** – Delete outdated segments that no longer apply.
 - V. **Inactive donors** – Flag truly inactive profiles (these might not need full migration).
 - VI. **Recurring status** – Verify which recurring plans are active vs paused or canceled.
 - VII. **Mismatched gifts** – Look for any gifts tied to wrong campaign tags; correct them now.

Plan recurring donation migration carefully.

Recurring donors are often a nonprofit's most reliable source of revenue, which makes them one of the highest-risk areas during a platform switch. Unlike one-time donations, recurring gifts rely on saved payment tokens.

Since payment processors use different token formats, some recurring plans can be transferred, while others may require donors to update their payment information.

Before the migration, answer these questions:

- How many active recurring donors do we have, and what is our total monthly recurring revenue?
- Which recurring gifts are active, paused, failed, or canceled?
- Which payment methods are donors using (credit card, ACH, etc.)?
- Can recurring payment tokens be transferred, or will donors need to re-enter their payment details?
- Which donors should receive advance communication or instructions?
- Who will monitor recurring donations and failed payments after launch?

Communicate with recurring donors before the switch so they know what to expect and whether they need to take any action. After launch, closely monitor recurring gifts and failed payments to resolve issues quickly and avoid unnecessary donor churn.

Rebuild the most important donation forms first.

Rather than waiting until the last minute to replicate every old form, prioritize the forms that drive most of your revenue.

Priority donation pages

Priority	Page or form	Migration note
1	Main donation page	Rebuild and test thoroughly before launch
2	Monthly giving page	Rebuild alongside recurring gift migration
3	Active campaign pages	Move before making the new platform public
4	Upcoming event pages	Prioritize by event date
5	Peer-to-peer campaign pages	Coordinate with fundraisers and rebuild early
6	Older campaign pages	Retire, redirect, or rebuild later if needed

Donation form elements to review

Before publishing each form, check:

- **Suggested amounts** – Review preset donation levels.
- **Recurring giving** – Make the monthly giving option easy to find.
- **Donor-covered fees** – Verify the option and fee calculations.
- **Mobile experience** – Test every form on phones and tablets.
- **Payment methods** – Confirm all supported payment options work correctly.
- **Campaign labels** – Check that funds or campaign names are accurate.
- **Confirmation and receipts** – Review thank-you pages and email receipts.
- **Internal notifications** – Confirm staff receive donation alerts where needed.

Test payment processing before launch.

Before launching the new platform, test every donation scenario your supporters might use.

Review one-time and recurring donations, all payment methods, donor-covered fees, mobile giving, confirmation pages, receipt emails, reporting, integrations, and failed payment or refund workflows.

Resolving issues before launch helps prevent donor frustration and lost donations.

Test area

What to check

One-time gift

Processes successfully and displays confirmation

Recurring gift

Subscription is created with the correct details

Card & ACH payment

All payment methods process correctly

Donor-covered fees

Fees are calculated and displayed correctly

Mobile donation

Forms work smoothly on mobile devices

Receipt email

Donor receives the correct confirmation and receipt

Admin & reports

Gifts appear in the correct reports and dashboards

Integrations

Donation data syncs with connected systems

Failed payments & refunds

Errors and refunds are handled correctly

Review integrations before switching platforms.

Review every system connected to your fundraising platform before the migration. You should aim to prevent broken workflows, missing data, and reporting issues after launch.

Questions to ask:

- Which systems need donor or donation data?
- Which donor and gift fields must sync?
- How often should data sync, and what triggers it?
- Who owns each integration?
- Which reports or workflows depend on it?
- What is the backup plan if a sync fails?
- How will each integration be tested before launch?

Integration type	What to review	Team owner
CRM	Donor records and gift syncing	Development
Email platform	Donor lists, segments, campaigns	Marketing
Finance tool	Gift exports and accounting reconciliation	Finance/Accounting
Reporting system	Campaign and revenue dashboards	Leadership/Analytics
Automation tool	Workflow triggers (thank-you emails, etc.)	Operations
Event system	Registrations and attendee data	Events

Redirect active campaigns and update donation links.

When your donation platform changes, update every public link so donors always reach a working donation page. Plan which campaigns will move immediately, which will stay on the old platform temporarily, and where redirects are needed.

Questions to ask:

- Which donation and campaign URLs need updating?
- Which campaigns should remain on the current platform during the transition?
- Which pages need redirects?
- Which teams are responsible for updating links?
- Have external partners been given the new donation URLs?
- How will broken links be monitored after launch?

Channel

What to update

Website

Donate buttons, embedded forms, and campaign page URLs

Email

Campaign templates, newsletters, and automated emails

Social media

Profile links and active campaign posts

Events

Registration pages, QR codes, and sponsor links

Ads

Campaign URLs and QR codes

Internal

Board, staff, and volunteer resources

Partners

External websites linking to donation pages

After launch, monitor for broken links and 404 errors, and add redirects where needed to avoid losing donations.

Train your team before launch.

A successful platform switch depends on more than the software. Train each team on the workflows they use every day so they can work confidently from day one and avoid unnecessary mistakes after launch.

Team	Training focus
Development	Donor records, gift entry, campaign pages, recurring gifts
Finance	Financial reports, reconciliation, receipt emails, exports
Events	Ticketing, registrations, check-in, reporting
Marketing	Donation forms, campaign links, email integration
Donor Relations	Donor history, receipts, supporter inquiries
Administrators	System settings, user roles, permissions, integrations
Leadership	Dashboards, revenue reports, campaign performance

Give each team time to complete hands-on practice before launch so they are comfortable using the new platform in real fundraising situations.



A simple fundraising platform migration timeline.

While every organization is different, a phased approach helps manage the workload. Here's a sample 6-week timeline for a medium-to-large nonprofit:

Phase	Focus	Key actions
Weeks 1–2	Audit & planning	Review current forms, campaigns, donor/donation data, recurring gifts, reports, and integrations (see sections above).
Weeks 3–4	Data and setup	Clean and export data, rebuild priority donation forms, configure campaigns, and set up key integrations.
Weeks 5–6	Testing & training	Perform payment and form testing, simulate gift flows, finalize integrations, and train staff.
Launch Week	Go live	Cut over to the new system: update public links, start processing donations on new platform, and monitor traffic.
First 30 days	Review & improve	Track early donations vs. expected, fix any issues in forms or workflows, compare key reports to baseline, and gather staff/donor feedback.

For very large organizations, you might extend each phase or run steps in parallel. The important thing is not to rush testing or skip training.



What to do if your nonprofit is still in a contract?

It is common to worry, “What if we’re locked into our current platform?” The good news is that you do not have to wait to start preparing.

Use the remaining contract period to plan your migration, organize your data, and test your new platform so you’re ready to switch when the contract ends.

Preparation checklist:

- Audit your current platform, including forms, data, features, and costs.
- Compare fundraising platforms, pricing, and key features.
- Clean up donor and donation data.
- Build and test sample donation forms.
- Document existing workflows and reports.
- Review how integrations will be migrated.
- Create a staff training and phased launch plan.

One advantage of platforms like BetterWorld is that it offers a free plan you can start with right away. Even under contract, you can create a free BetterWorld account and begin planning and prototyping on it with no risk.



30-day post-migration plan.

Remember: launch day isn't the finish line. In the month after going live, continue monitoring and tweaking.

Time period	Main focus	What to review
Days 1–7	Donation continuity	Donation volume, receipts, recurring gifts, failed payments, campaign reporting, donor and staff issues
Days 8–15	Internal workflows	Staff feedback, report access, donor records, integrations, finance reconciliation
Days 16–30	Optimization	Donation forms, broken links, donor-covered fees, monthly giving, legacy pages, internal documentation, training gaps

After 30 days, you should have most kinks worked out. Keep iterating and improving: the best fundraising platforms allow continuous A/B testing and upgrades over time.



Frequently asked questions.

1. How long does it take to switch fundraising platforms?

It varies by organization size and complexity. A midsize nonprofit might spend 4–6 weeks auditing and setting up, then 2–3 weeks testing and training, as outlined above. Larger orgs may take longer.

2. What is the biggest risk when switching fundraising platforms?

The biggest risk is losing donors or revenue, especially recurring donors, during the transition. Data errors are another major risk. That's why donor continuity is the #1 priority. Proper planning helps avoid these pitfalls.

3. Can recurring donations be moved to a new fundraising platform?

Yes, but with careful planning. Some platforms allow you to import payment tokens so donors don't have to re-enter info. Otherwise, you'll need to ask donors to set up their gifts again on the new system. As noted above, Migrating recurring donors usually requires manual steps and proactive donor communication.

4. Can nonprofits start planning a switch while still in a contract?

Absolutely. Planning and preparation can and should happen well before a contract ends. Use the time to audit and clean data, draft forms in the new system, and train your staff on new workflows. Platforms like BetterWorld let you create a free account immediately, so you can build and test without waiting for the old contract to expire.



Simplify fundraising with BetterWorld.

Switching to a fundraising platform does not mean you have to disrupt your current fundraising. BetterWorld lets you start preparing right away with a free plan that includes unlimited campaigns, all fundraising tools, and a 0% platform fee.

Instead of managing multiple disconnected tools, your team can manage fundraising from a single system while reducing data silos and manual work.

If you're considering a platform move, we recommend starting early. Sign up for a free BetterWorld account today and begin recreating your main donation pages and importing sample data.

Our free plan lets you test alongside your current system and refine everything without time pressure. When your current contract ends, you'll be ready to switch on your timeline.

[Sign up for free](#) or [Request a demo](#) to get started!