

## Mid-Sized Environmental Nonprofit with Average DRR

**Context:** A mid-sized environmental nonprofit with a \$1M budget focuses on climate change advocacy and has a mix of online donors, event attendees, and a small group of major donors. It uses CRM for donor management and has a dedicated fundraising team.

**Starting DRR (2024):** 42% overall (within the industry average of 35-45%), with 25% for first-time donors, 65% for repeat donors, and 70% for major donors (\$1,000+).

**Challenge:** First-time donors acquired through online campaigns have low retention, and major donor retention is stagnating due to limited personal engagement.

**Growth benchmark:** Increase overall DRR to 46% by the end of 2025 (a 4% increase), with first-time donor DRR to 30% (a 5% increase) and major donor DRR to 75% (a 5% increase).

### Strategies:

- ☒ **Enhanced onboarding for first-time donors:** Implement a 5-part email drip campaign for new donors, including a welcome, impact story, survey, recurring giving pitch, and invitation to a virtual webinar on climate action.
- ☒ **Major Donor Stewardship:** Assign a staff member to manage relationships with major donors, scheduling quarterly check-in calls and offering exclusive updates on policy wins.
- ☒ **Recurring giving campaign:** Launch a “Green Sustainer” monthly giving program with a branded landing page and promote it during year-end appeals.
- ☒ **Lapsed donor re-engagement:** Send a “We Miss You” email campaign to donors who lapsed in 2023 or 2024, highlighting recent achievements and offering a matching gift incentive.

### Tracking methods:

- ☒ Use Bloomerang’s built-in retention report to calculate DRR quarterly, segmenting by donor type (first-time, repeat, major).
- ☒ Create a dashboard in Google Data Studio to visualize DRR trends and campaign performance (e.g., email open rates, webinar registrations).
- ☒ Track recurring giving sign-ups and lapsed donor reactivation rates to measure strategy impact.

**Progress (Mid-2025):**

- ☒ First-time donor DRR rises to 28% due to the onboarding campaign and 5% conversion to monthly giving.
- ☒ Major donor DRR reaches 73% as personalized outreach strengthens relationships.
- ☒ Overall DRR climbs to 44%, boosted by 50 reactivated lapsed donors.

**Outcome (End of 2025):**

- ☒ Overall DRR reaches 46%, meeting the target.
- ☒ First-time donor DRR hits 30%, with 7% of new donors becoming monthly givers.
- ☒ Major donor DRR reaches 75%, with two major donors upgrading to \$5,000 gifts.
- ☒ The “Green Sustainer” program grows by 20%, contributing to revenue stability.

**Key insight:** Mid-sized nonprofits can achieve moderate DRR growth by balancing broad strategies (e.g., onboarding, recurring giving) with targeted efforts for high-value donors.