

The Ultimate Guide to Mid-Level Giving

PURSUANT 

GivingDNA 

CONTENTS

— 3 —

PART 1

The Case for Developing a Mid-Level Giving Program

— 14 —

PART 2

How to Build a Mid-Level Giving Program

— 26 —

PART 3

The Data & Technology You Need to Power Your Mid-Level Giving Program

— 37 —

PART 4

How to Design a Communications Plan for Your Mid-Level Giving Program

THE ULTIMATE GUIDE TO MID-LEVEL GIVING



PART 1

The Case for Developing a Mid-Level Giving Program

PURSUANT. 

GivingDNA. 

Bad news first: The philanthropic boom fundraisers experienced throughout 2020 and in early 2021 appears to be over. The good news is **nonprofits have a chance to develop the untapped potential** in their donor rolls. **All isn't lost — it's just time for a reset.**



• 2022

Overall Donor Retention

↓ 3.5%

Number of Donors

↓ 10% YOY

The latest data show decreases across all key metrics. Dollars from large donors fell 1.7%, but the most concerning drops involve people: donor retention is down 3.5%, and the number of donors fell 10% year-over-year (YOY)¹. This tells us many donors acquired in 2021 — likely through crises like the COVID-19 pandemic or natural disaster relief efforts — did not return in 2022.

What's more, economic worry marked the end of 2022 and led to a decrease in large and major donor gifts. This drove down giving in the fourth quarter, which is contrary to typical year-end giving trends.

In 2023, opportunity is the name of the game, especially for your monthly giving program.

Donors who made at least seven donations decreased the least YOY, and these regular supporters are particularly poised to upgrade to a higher giving level.

The Antidote: Mid-Level Donors

As the nonprofit sector gets its bearings during this transition, fundraisers should consider turning to mid-level donors, supporters who fall somewhere between direct marketing (the one-to-many approach) and major gifts (carefully crafted one-on-one relationships). What each organization defines as mid-level depends on various factors — the size of the organization, its average gift size, and so on — but a common range falls between \$1,000 and \$10,000 donated annually.²

New research continues to underscore the significance of this group of supporters, and organizations are increasingly establishing or staffing up mid-level giving programs.

For example, adding to Sea Change Strategies' [recent study](#) of mid-level giving, Sylvia Brown, creator of the “Smart Donors . . . Make a Difference” online courses and workshops, partnered with Boston College School of Social Work assistant professor Cal Halvorsen last year to learn more about this important subset of donors. Looking at 1,260 Americans aged 35 and up whose total donations equaled \$2,000 to \$20,000, the duo found that the group contributed a higher share of their earnings (1.9 percent) than the national average.³

That's a powerful finding when coupled with results from Sea Change Strategies' earlier analysis: In the first of the organization's studies, mid-level donors, though small in number, produced as much as 33 percent of the income that nonprofits raised from individuals. No wonder, then, that Brown recommends fundraisers focus their attention on those with an annual income of \$100,000 to \$200,000 (roughly 20 percent of Americans).



Besides generosity, mid-level donors are characterized by their loyalty.

*When asked about their most significant gift in 2019, two-thirds of mid-level donors surveyed by Brown and Halvorsen said that they had **supported the same nonprofits for 5+ years.** Those kinds of numbers indicate mid-level donors are both predictable and valuable.*

In fact, if you examine your direct marketing program, you'll likely find that mid-level donors are its backbone. They're "your most loyal group of donors and retain at the highest levels," says Ryan Carpenter, vice president of client success at Pursuant.

Moreover, "they share your story with their social circles, which amplifies your footprint," says Whitney Norman, Pursuant's vice president of client solutions. Put another way, mid-level donors evangelize your organization, providing valuable (and free) word-of-mouth marketing.

More importantly, they're the prospects best suited to move up to your major gifts program. "On average,



two-thirds of your major donors start in direct marketing," says Krisitn Priest, Vice President, Client Strategy and resident mid-level giving expert. "Being proactive, creating a plan around mid-level donors, and elevating them is really going to help your major gifts program and your fundraising program as a whole."

Mid-level donors are simply the best segment for discovering major gift prospects not just for today, but for five years down the road. But, as their giving increases, they may drop off if they're not addressed or treated differently from your mass-market audience. You'll win loyalty when there's an intentional strategy for engaging, retaining, and perhaps nurturing mid-level donors for the next level of charitable giving.

And if they don't stair-step up to major gifts? They can still make a big impact as legacy donors. It's another way to think of the long-term stewardship of your mid-level program — as "a prime place for planned gifts," says Priest.



Roadblocks You May Face

As compelling as the generosity and loyalty of mid-level donors may be, you may still find roadblocks to creating a program just for them. Most budgets simply don't consider them. Plans for the fiscal year generally (and rightfully) dedicate resources towards major gifts and direct marketing efforts, leaving little for new initiatives.

*And then there's the **tech hurdle**.*

Without technology that can easily produce data insights such as where else your donors have contributed or who's in danger of lapsing, gathering the intel you need is time-consuming and cumbersome; it may not even yield information you can act on. Finding the right tech solutions, such as GivingDNA, can help you shape an efficient and effective program that can automate otherwise unwieldy tasks and free you and your team to focus on relationship-building campaigns.

What team, you say? With internal resources stretched thin and caution around adding head count for a program that is still being finetuned, it may feel like you don't have the resources you need to develop, launch and optimize a mid-level program. Finding the right partner, such as Pursuant, can help. The flexible structure of Pursuant's full-service agency allows you to benefit from the collective expertise of strategists, digital experts, print experts and data analysts to efficiently launch a mid-level giving program that maximizes the opportunity specific to your organization - and maintain it until (and if) you're ready to take it in-house.

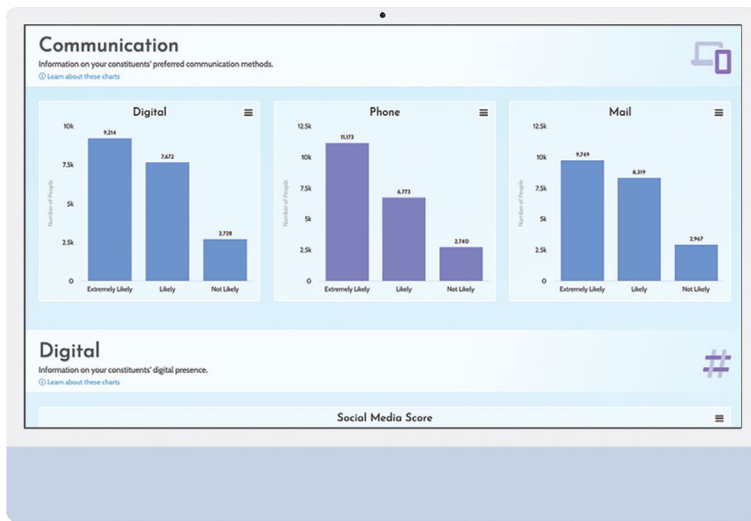
The Right Solution for Your Mid-Level Giving Program

To properly track your audiences — mass market, mid-level, major giving — you need a tool that can efficiently and effectively track them for your mid-level gift officer or team.

Take, for instance, GivingDNA. After users upload the portfolio lists of gift officers within their organization to the platform, each officer or their manager can easily access powerful visualizations of their progress towards yearly goals as well as the donor health of their lists. Officers can also see where constituents are located at a state level — maybe they're concentrated in a couple of states like Texas and Illinois, for example. In fact, users can drill down and discover concentrations at the county or parish level, which can be helpful when planning exclusive mid-level donor events or in-person visits with candidates for major giving programs.

Each visualization can also be downloaded with a single click, so gift officers can create reports for leadership or other colleagues without having to submit a request to a data or IT team. Managers can also quickly monitor their gift officers' performance to see who may need help or who others can tap to learn what's working best.

With a solution like GivingDNA + Pursuant's mid-level giving services, fundraising teams across every giving level and program can better meet their goals and support the mission of their nonprofits.



Kristin Priest, VP, Client Services, has helped Pursuant clients craft upgrade strategies that deepen relationships and increase revenue.

To learn more about our mid-level solutions, visit pursuant.com/midlevel

Respond to the Challenges in **4 Easy Steps**

Based on what we shared, you already have broad data on the value of mid-level donors. Now it's time to get specific on the potential returns that your mid-level audience offers your organization and cause.



1

Define Your Mid-Level

First, we have to define what mid-level means for your nonprofit. There are a few standard ways to do this. You could simply take the top 5 percent of your mass-market audience and call it a day, or you could define your mid-level as a range of \$500 to \$1,000 or up to whatever your major gift threshold is. Another option is the following equation:

$$\left(\text{Your average direct marketing gift} \times 3 \right) \times 12 = \text{Major Gift Threshold}$$

So, if your average direct marketing gift is \$35, you multiply that by three to end up with \$105. Then, you multiply that number by 12, which means the low end of your mid-level gift starts at \$1,260.

2

Calculate Your Potential Addressable Audience

Once you have that sum, go back to your file and see how many constituents fit that profile. When you have that number, you'll be able to predict the potential return of a mid-level giving program, e.g., "By creating such a program, we can expect a return of X because our addressable audience with upgrade potential is Y." **When nonprofits create strategies for engaging and elevating their mid-level pool, there's a noticeable lift across that segment.**





3

Streamline Your Tech Stack

But remember: Efficiency is the name of the game. You'll want to invest in technology (or augment your existing tech stack) to automate this work. Besides assisting your other fundraising efforts, the right software will identify which mid-level donors to target and when.

4

Visualize the Donor Journey

And to help colleagues or leadership who may be skeptical of establishing a mid-level program, map the donor journey for them. There are plenty of well-known insights about annual fund and major gifts programs, but emerging data about the potential of mid-level giving programs is still trickling throughout the industry. By mapping the donor journey of your average mid-level donor, you (and your colleagues) will see that it includes touchpoints throughout the organization. From their start in direct marketing, mid-level donors who qualify would then move on to the newly created program just for them. The ones with potential to climb to major gifts would be passed on to that department. There's a role for everyone to play, which can help dissolve departmental silos and territorial teams.

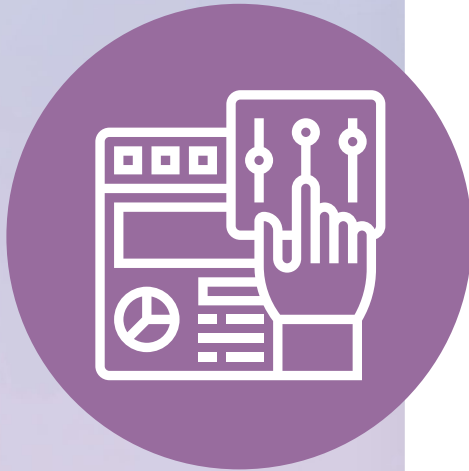
Raising funds for your organization's mission is a shared goal, and mid-level donors offer predictable, lucrative support to celebrate and honor. "They may not get their names on buildings, but they're the backbone of your direct marketing program and care deeply about your organization," says Carpenter. "They should be appreciated and listened to."



THE ULTIMATE GUIDE TO MID-LEVEL GIVING

PART 2

How to Build a Mid-Level Giving Program



PURSUANT. 

GivingDNA. 

Congratulations!

You're here, which means you understand the value of funding a mid-level giving program.

Or perhaps you are still working to gain buy-in and funding for your mid-level program. Or you're hoping to improve the program you already have. Wherever you are in that journey, this ebook will present you with concrete details about how the program will come together.

You've come to the right place. Here, we'll cover the building blocks that compose the foundation of your soon-to-be flourishing mid-level giving program. From understanding what "mid-level" means for your organization to learning the skills and traits that best characterize the colleagues who head up a mid-level program (as well as what they actually do in their roles), we run through what it takes to start such a program from scratch.

Let's get started!



FIRST STEP: Defining your mid-level tier(s)

Mid-level donors fall somewhere between your direct marketing audience (your one-to-many fundraising efforts) and major-gifts donors (who you cultivate with one-to-one relationships). The precise dollar amounts that characterize your mid-level program will depend on the organization, but common approaches for defining it include:

- » Taking the top 5 percent of your mass-market audience
- » Choosing a range from, say, \$1,000 to \$10,000 (or up to whatever your major-gifts threshold may be) that a donor contributes yearly
- » **Applying the following equation:**

$$\left(\text{Your average direct marketing gift} \times 3 \right) \times 12 = \text{Major Gift Threshold}$$

So, if your average direct marketing gift is \$25, you multiply that by three, which yields \$75. Then, you multiply that number by 12, giving you the low end of your mid-level; in this example, that would be supporters who contribute \$900 annually.

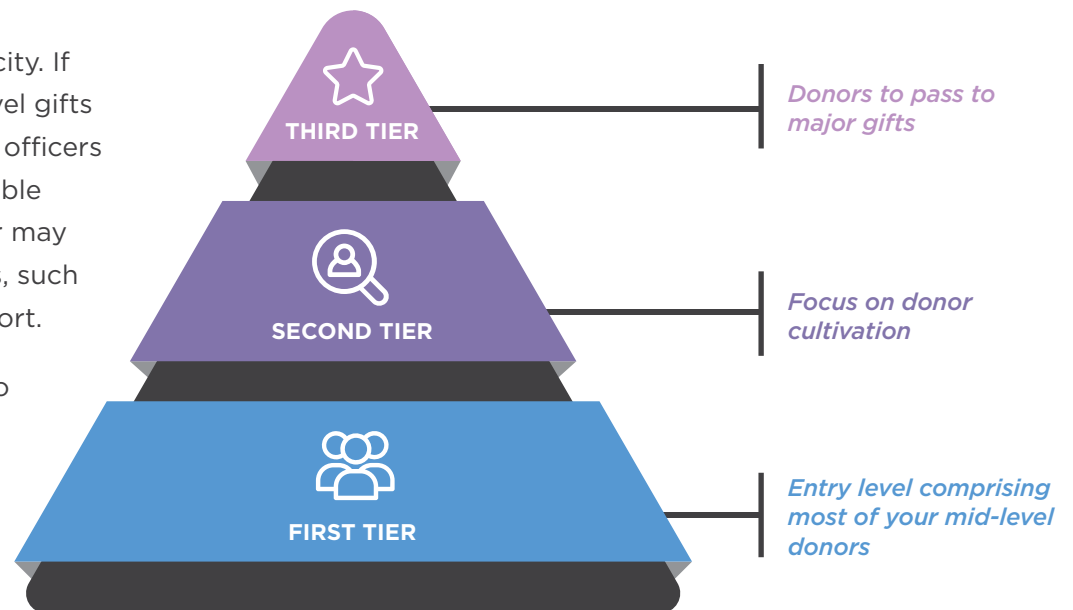
Whichever method you choose, once you have the parameters established, you'll want to revisit your file and see how many constituents fit the profile. Can you provide an elevated experience to all of them or perhaps some portion of the most valuable? Consider your staff's capacity when answering that question. For instance, if your mid-level consists of 3,000 names, you may not have the staff to adequately execute the program, which typically involves frequent personal and personalized outreach. If that's the case, then feel free to recast the net — maybe you move the lower end up to shrink your mid-level pool to a more manageable size, for example. Remember, you'll keep mid-level in your current direct marketing stream, so it's ok if you can't provide everyone a more personal experience.

Again, what's manageable depends on your staff's capacity. If your nonprofit is planning on having a dedicated mid-level gifts officer, their list will be larger than what your major gifts officers typically handle. So, if your major gifts officer is responsible for about 125 to 150 donors, then a mid-level gifts officer may handle 250 to 400 names if they don't have other duties, such as coordinating the organization's annual fundraising effort.

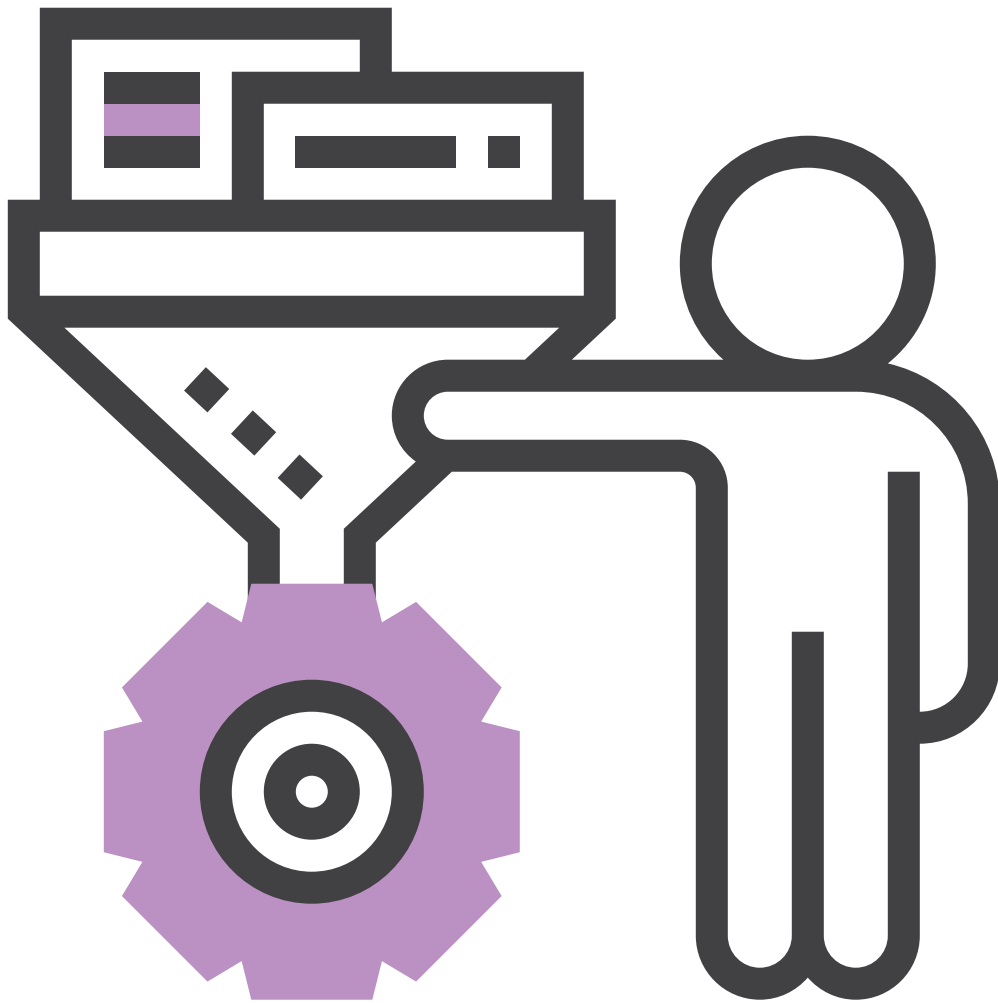
No matter the size of your mid-level group, you'll want to create tiers to help you strategize tasks. For the **entry tier**, which will comprise the majority of your mid-level donors, elevated email and mail outreach will suffice. **Above them will sit a group** that you or your team can personally cultivate, and **at the very top will be a much smaller subset** that you'll want to pass along to your colleagues in major gifts.

Let data be your guide in creating this hierarchy with a tool like GivingDNA. The right platform can help you be more efficient, effective, and hasten time-sucking tasks, freeing you and your team to focus on relationship-building initiatives.

If your tech stack isn't robust enough to automate segmentation tasks or identify prospects, consider leveling up.



MID-LEVEL DONOR EXPERIENCE HIERARCHY



Data points to gather as you develop your tiers include:

- » **Discretionary income**
- » **External giving**
What other causes do they support?
- » **Supports similar causes**
Do they give to organizations like yours?
- » **Affinity**
How closely do their philanthropic interests mirror your mission?
- » **Wealth**
- » **Past donations to your nonprofit**
- » **Communication preferences**
In which channel do they prefer to engage with your organization?
- » **How they've engaged with your organization**
For example, do they attend events or volunteer?

*Such data can give your fundraising efforts a **real boost.***

Take, for example, the experience of CESC, a social services nonprofit in Florida. Due to unexpected and expensive operational changes brought on by the pandemic, the organization needed to raise their revenue by 50 percent at EOY 2020. Using GivingDNA to uncover their constituents' philanthropic affinities, demographics, and wealth, CESC and Pursuant worked together to identify discrete audiences. CESC then took those insights and drafted messaging that aligned with the different groups for targeted communications to prompt a greater response and, hopefully, higher levels of giving. In other words, CESC built one-to-many communications that felt relevant and highly personal. Would the effort pan out?

The results were indeed impressive. With a collective response rate of 12 percent from the segmented audiences and an average gift size of \$197, CESC had raised \$124,000 in the months of November and December. By year's end, **the nonprofit had grown its YOY revenue by 84 percent, a full 34 percentage points higher than their initial goal of 50 percent**, suggesting that the right combination of software and communication strategy can make an outsized impact on an organization's fundraising.

The right combination of software and communication strategy can **make an outsized impact** on an organization's fundraising.

Success in 4 steps

Tools like GivingDNA will enrich your efforts, but they're just one part of the equation. There are a few other considerations to keep in mind.



1

Build a winning team

Once you have the right tools in place, you need a team that can properly wield them. What personalities and skill sets are best suited for that?

Ideally, you want to find teammates who have a collaborative mindset because mid-level giving programs require partnering with direct marketing and major gifts teams. Along those same lines, candidates who excel at relationship-building should rise to the top. Mid-level giving programs involve cultivating relationships with donors who may be passed on to major gifts, so someone who can seed those kinds of high-touch engagements will be key.

If candidates also have a background in both direct marketing and major gifts, even better. Strong data analysis skills will round them out.

2

Establish a cross-functional workflow

Once you have the right team in place, establish a workflow with the direct marketing and major gifts teams. Together with both, map the complete donor journey to identify all the touchpoints across the organization. The exercise will cut across silos, channels, and donor levels, helping teams better understand the global effort involved in meeting the organization's mission.

"You'll uncover opportunities to surprise and delight donors, as well as chances to engage them in more meaningful ways," says Kristin Priest, vice president of client services at Pursuant. "It's really important that every member of those teams plays a part in that conversation and understands their unique contribution in creating the ideal donor experience."

In short, you're getting buy-in throughout the organization, and you're establishing a transparent workflow that everyone can follow. For instance, when a donor gives X amount, your colleagues in direct marketing will give you a head's up that the donor has just upgraded to mid-level. Conversely, when a donor has been primed for major gifts, you'll reach out to that team.



3

Old friend donor pyramid, meet new friend donor vortex!

Remember, though, that donor identities are fluid. They may flow between mid-level and major gifts back to the annual fund — and that's OK. “Mid-level isn't a tenured position,” says Carpenter. “Just because a donor gave you a qualifying gift eight years ago and now they give you \$50 per year, it doesn't mean they should be on your mid-level list. You're trying to create an elevated experience for those who are currently supporting you at the mid-level. It's OK if some drop back into your annual fund group.”

To stay on top of that fluidity, monitor your data on a regular basis — perhaps quarterly. Track who's new, who's in danger of lapsing, and who you've lost. Rejigger strategies and tasks based on the data.

4

Inventory Your Content

You'll also want to get familiar with the full suite of communications your supporters are receiving. From mass-market to major gifts, to marketing, consider the content suite already at your disposal and find ways to adapt or repurpose. Then step back and look at it comprehensively. Consider the areas of redundancy and identify content gaps you need to fill. Evaluate your content through the lens of what your mid-level donors want and expect. Fundraising and Marketing agencies like Pursuant are one great place to start. Consider implementing listening experiences that provide more authentic insights into what your supporters care about on social, through surveys, and by using gamification.

Use these learnings to inform thoughtful tests across your communications. Are some messages resonating better than others? “Today digital listening tools are accessible to nearly every nonprofit,” says Jennifer Bielat, executive vice president of client strategy. “They are helpful indicators of your donors' desire to engage with your organization in a deeper way, and help you understand how they want to engage.”

To brand or not to brand

Next, decide if it makes sense to brand your mid-level program.

Without one, “the program is merely an internal way of looking at those donors who give at a certain level, and that’s going to reduce their impact as a group for your org,” says Carpenter.

At the same time, if your nonprofit already has a monthly donor program, a branded mid-level program might compete with it. And some nonprofits may have a lower threshold for major gifts — \$5,000 and above, say — and that program may also have an existing brand identity.

But if those considerations don’t exist, then creating an external-facing brand for your mid-level program can be a very good idea. Just look to organizations like Feeding America, Year Up, and CARE for successful examples and how some have named theirs — The Opportunity Society at Year Up, for instance.

After you’ve named your mid-level giving program, develop a visual identity for it — a logo or set of images informed by data about your mid-level audience — and reinforce the brand throughout the organization’s communications. These efforts will nurture a sense of community and broadcast the importance of mid-level donors to your mission.



Don’t go overboard with special benefits for them, though. **“These people don’t want premiums. They don’t want sweaters and hats,” says Carpenter. “They care about your organization and want to know more about it, so think about benefits for them as more about insider information and exclusivity.** Is there a quarterly call or letter from the president that goes out to major gift donors? Can mid-level donors get the letter or join the call, too? Don’t be afraid to use what you already have as you focus on the exclusivity piece.”

In fact, because the pandemic has accelerated our adoption of digital tools, think about using formats like Zoom or Facebook Live to create exclusive events. Donors’ increased comfort with online formats invite your creativity as a fundraiser while also providing a path to scale your efforts.

The care and feeding of your mid-level donors

Now that you've established a workflow with the mass marketing and major gifts teams, how will your mid-level program distinguish itself from theirs? Remember that mid-

level programs are a blend of those two, so you'll borrow tactics and strategies from both. You'll continue the direct marketing efforts that got your mid-level donors to your program in the first place, but maybe you'll add a branded special appeal every quarter. You could even create a newsletter specifically for them.

Take a cue from your major gifts team and nurture one-on-one relationships with the top 5 percent of your tiered group. Prepare a list, allocate time to check in weekly with the folks on it, and remember to take notes of feedback you receive, special requests, and so on — just like your colleagues in major gifts do.

If you have an especially long list or your organization is lean, get help from trusted volunteers but make sure to give

them a call guide. Ideally, the calls aren't just simple thank-yous or check-ins but fact-finding missions where you or your team of volunteers engage donors in a conversation that helps

you better understand their motivations, the role that your organization plays in their life, and other information that paints a better picture of who they are. (Feel free to take inspiration from [this guide](#).) If you use volunteers, be sure to debrief afterwards but also encourage them to take notes during the calls.

It's likely to take some time to prime this cohort for the major gifts team, so be patient. There will be weeks or months when you don't have names to pass on to them. Or it might be that the major gifts team is slammed and can't take on new prospects just yet. It's likely that only 1-2 percent of mid-level donors overall will upgrade to major

gifts but don't be disheartened. That's a meaningful number of qualified prospects for your pipeline.



Tinker away!

Don't be afraid to experiment in your outreach to mid-level donors. For example, handwritten notes sent to mid-level donors performed exceptionally well for Ryan Carpenter, vice president of client success at Pursuant, in his past work with nonprofits. They had the great call-back percentages across all age groups, he says, more than voicemails and personal emails even.

On the other hand, salons and receptions — normally reserved for the major gifts experience — aren't necessarily appropriate for the mid-level, he thinks. "But it may work for your cause. It's a great space to get people to meet in an intimate way to talk about your organization," says Carpenter. "If that gets a mid-level gift for you or converts someone to a major gift donor, I encourage you to do it."

The point is: **experiment. If something works, fantastic; keep it up. If not, try something different.**

Metrics, metrics, and more metrics

Once your program is up and running, how do you measure its success?

There are a few metrics we suggest tracking:

- » **Year-over-year (YOY) revenue.** You won't be able to get good numbers for this until two years after the program has been established, but it's an excellent barometer of your program's success.
- » **Who and how many you've passed on to major gifts and how much they've donated.** These figures quantify the impact of a mid-level program on the growth of the major gifts pipeline.
- » **Personal outreach.** If you're consistently conducting personal outreach, review performance across your program as whole, not just by channel. For example, look at mail and email campaigns, online donations, event attendance, and volunteer sign-ups. You want to see how mid-level donors are giving across your organization. Check, too, how much of that is follow-up behavior. Did they buy a ticket to an event or increase their contribution after talking to someone on your team?
- » **Retention.** Were you able to keep 60 to 70 percent of your mid-level donors? Aim for that baseline.
- » **Lifetime Value (LTV).** This figure will help you forecast the total lifetime giving of your mid-level donors and help you prioritize whom would respond to an elevated experience.



These are just a handful of the metrics that can inform a program evaluation, and you'll want to ensure that colleagues on partner teams have KPIs and incentives that support yours. For instance, how many names from the direct marketing team were elevated to mid-level? How many prospects from the mid-level did major gifts officers engage? By establishing these metrics on other teams, you'll encourage cross-collaboration, which ultimately lifts all boats.

While results are channel-dependent, look for measurable effects about six months after establishing the program. We'd love to hear how it goes, so please don't be shy about getting in touch and letting us know what's worked for you so far and where we could improve our recommendations based on the results you've collected.

And if you need a little help figuring out how to communicate with mid-level donors, check out our guide or the series as a whole!

THE ULTIMATE GUIDE TO MID-LEVEL GIVING



PART 3

The Data & Technology You Need to Power Your Mid-Level Giving Program

PURSUANT. 

GivingDNA. 

In earlier ebooks, we discussed talking points for establishing a mid-level giving program, as well as the nuts and bolts of starting the program once it's been greenlit.

One constant and key theme has been our emphasis on **personalization**.



Personal and personalized outreach is important

— in fact, 59 percent of donors surveyed by Accenture⁴ in 2017 said personalization would raise their donations by 10 percent, while 8 percent said it would increase their donation by up to 50 percent more — it's particularly helpful when cultivating mid-level donors. Because they sit between your mass-market and major-gift supporters, mid-level donors need personalization to acclimate them to the personal outreach they'll receive if they move on to the major-gift level.

Their place between mass-market and major-gift subgroups also means that, although you won't have as many mid-level donors as supporters in your direct marketing audience, they'll still outnumber your major-gift audience.

As a result, your personalization efforts for mid-level donors will need to be hyper-efficient, especially if your team is lean or consists of a single mid-level gift officer.



59% said **personalization would increase their donations** by



10%



8% said **personalization would increase their donations** by



50%

Personalization goes beyond populating the 'first, last' fields in a mail merge. Effective, comprehensive personalization means tailoring your message to a constituent's unique interests — such as why they give to you, their donation or volunteer history, where they live, etc. With the right data in place, the possibilities are endless.



The importance of personalization can't be underestimated.

Data and Technology Can Help

Your organization can achieve that hyper-efficiency with the help of data points and technology. “Today, there are more diverse and reliable donor data that you really should use to best understand your donors,” says Ryan Carpenter, vice president of client success at Pursuant.

From zero-party data, such as the email that a donor provides you, to third-party data from a vendor like Acxiom, there are reams and reams of information that can help you better get to know your donors. **“You can find out what they care about, their wealth, the channels that they’re engaging through — it’s all going to help you understand how to create a unique experience for these individuals,”** says Carpenter.

When you consider that personalized calls to action (CTA) convert 202 percent better than other kinds of CTAs included in emails, according to HubSpot,⁵ or how approximately 71 percent of donors surveyed by Abila⁶ in 2016 said that they feel more engaged with a nonprofit when they receive content that’s personalized, the importance of personalization (and the data that powers it) can’t be underestimated.

Drilling Down on Data

Yet all that data can be intimidating. Which data should you include when trying to understand who your mid-level donors are, and which data should you use to gauge the success of your mid-level giving program?

You probably already have some of the data to answer the first question because you needed it to determine what constitutes your mid-level giving range, but let's review the categories just to be sure:

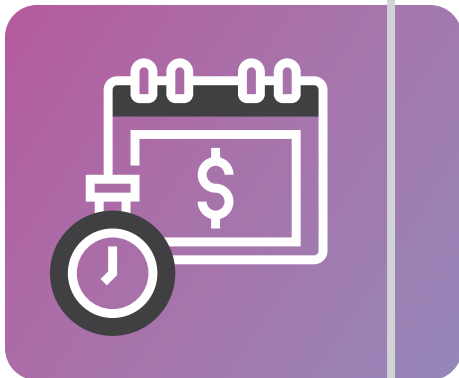
- » **Affinity.** How closely does your nonprofit's mission align with donors' interests and passions?
- » **Philanthropy elsewhere.** Do other charities they support complement or mirror your organization's mission?
- » **The direction of a donor's contribution and its frequency.** Have their donations been trending downward or upward? Have they been giving more often, or are they in danger of lapsing?
- » **Wealth.** What's a donor's giving capacity?
- » **Personal engagement.** How have they been engaging with your nonprofit — by volunteering, publishing social media posts about the organization, sending a yearly check, and so on? Create codes for these interactions: positive engagement, neutral engagement, negative engagement, or no connection.



If you're wondering how to access that information, don't worry — we'll get to that in a moment. We understand that some nonprofits may not have such data in their file or only get it appended every few or so years when licensing information from a data intelligence company.



Let's start with the data you need to **track and assess the health of your mid-level giving program:**

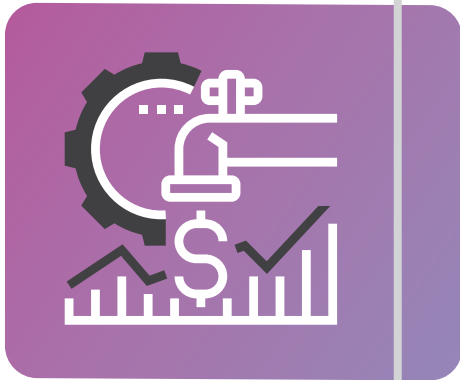


Year-over-year (YOY) revenue.

You won't be able to compare apples to apples until after the second year of the program has ended, but after its first year, you can compare the performance of your mid-level to the prior year, when there was no program or there was a different strategy in place.

You could also conduct quarterly evaluations of various metrics (such as the number of links clicked in a newsletter curated specifically for mid-level donors or their attendance at virtual events) so that you have a clear idea of your progress. By measuring your progress quarterly, you have time to course-correct if some tactics aren't showing the return you'd like.

Then, when the second year of the program is over, you can make that direct YOY revenue comparison you couldn't in the two previous years.

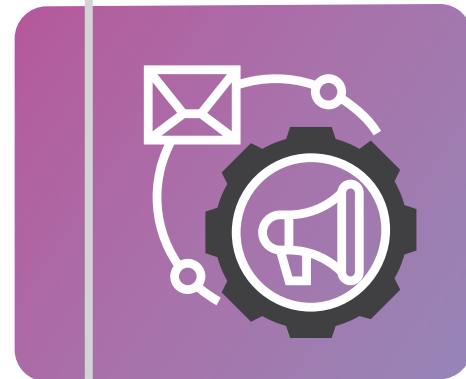


Growth of major-gifts pipeline.

How many mid-level donors did you cultivate and pass on to your colleagues in major gifts? How much did they donate? Compiling these numbers will underscore the collaborative framework needed for the success of all teams regardless of which donor class they serve.

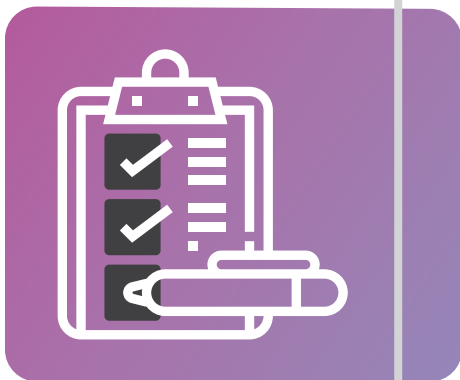
Personal outreach and response rates.

If you regularly conduct personal outreach, provide the outcomes across all channels. How did your direct mail and email campaigns perform? What about attendance at events for mid-level donors? Did their behavior change as a result of your outreach? For example, did they buy a ticket to an event or become a monthly sustainer after you or someone from your team contacted them?



Change in status.

Who upgraded their donations? Who lowered theirs? Who held steady at the same contribution level? Who lapsed or became new donors?



Gathering or managing this information may feel

overwhelming, especially when the tools and resources available to you don't easily handle the volume of data you've compiled. Or you might suffer another common problem: It's time-consuming to parse the information. "It's hard to manipulate some of this reporting on your own," says Carpenter, "and if you're at a smaller organization, you may not have the time or staff who can open up an Excel spreadsheet, run a pivot table, and create charts in a timely manner."

Fortunately, we live in an age when such tasks can be easily automated.

There are a bevy of technological tools and resources at our disposal, and their role in our organizations' longevity has only become more prominent as the pandemic pushed us towards ever-more digital solutions. To survive in this transformed world, nonprofits must bolster their tech stack or jettison legacy systems that no longer meet fundraisers' needs.

Such changes are necessary because "a mid-level program requires you to understand your donor almost as much as your major gift program — but at a much bigger scale," says Dawn Galasso, Vice President of GivingDNA. "The only way to achieve this is by having a technology partner who can look at the organization's internal data, add external data, and then segment that group by interests quickly and at scale."



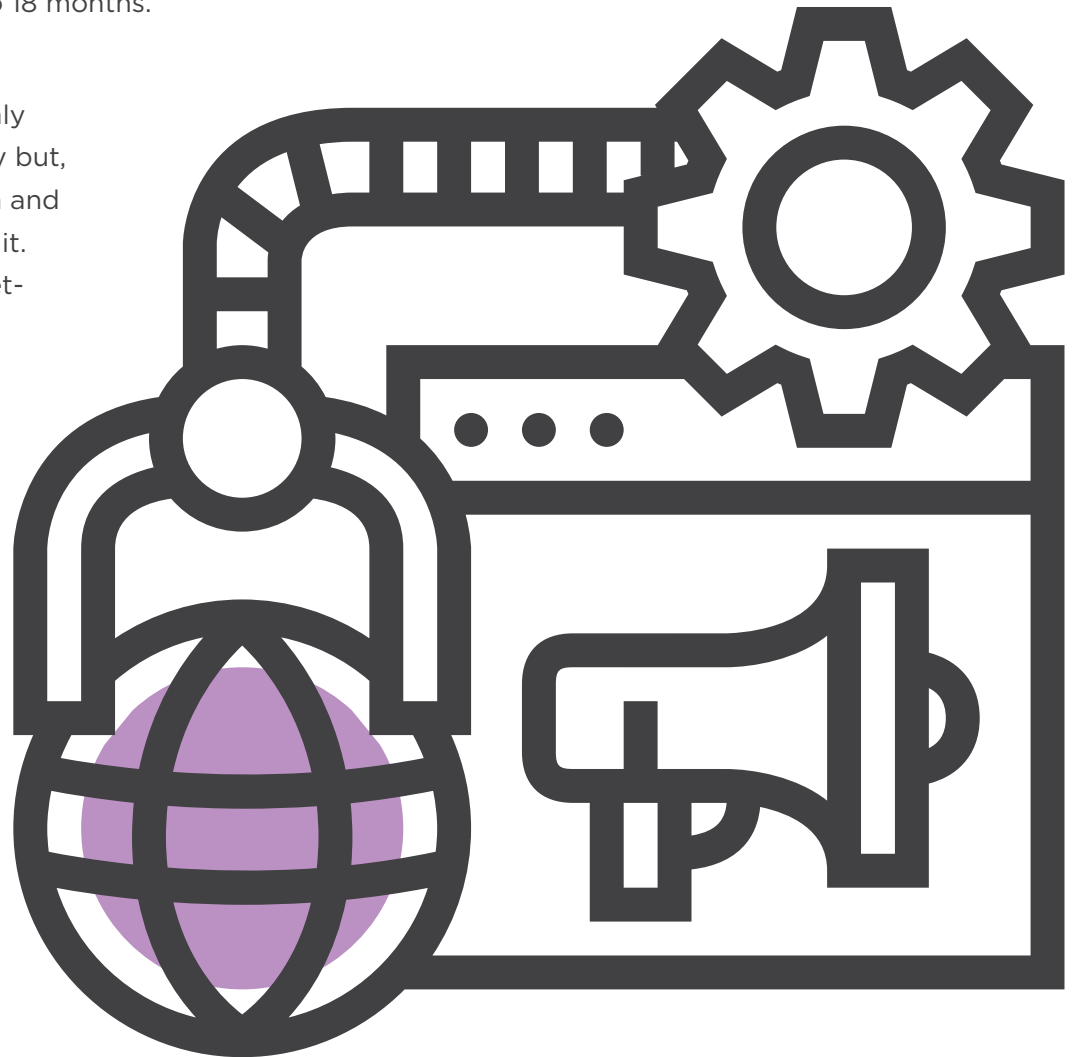
“A mid-level program requires you to understand your donor almost as much as your major gift program — **but at a much bigger scale.**”

Acknowledging the Challenges

But finding technology (and the partner support behind it) that meets your needs is easier said than done. Of course, you can turn to big players like Blackbaud and Salesforce. They're powerful platforms and well-known, but building dashboards within them can be difficult and time-intensive. Anecdotally, some organizations and IT professionals have reported⁷ the Salesforce set-up process taking anywhere from three to 18 months.

Then, it can be hard to secure in-house IT assistance. You need staff who can not only maintain and troubleshoot the technology but, more critically, who can interpret the data and know how to extract the most value from it. "A mid-level program is definitely not a set-it-and-forget-it program. You want to consistently review and optimize your approaches based on the results you're getting so that you can refine as necessary," says Whitney Norman, vice president of client solutions at Pursuant.

"There are program components that can be automated," she continues, "which can be really beneficial, especially for those operating in lean shops."



The **Right Solution** for Your Data Needs

So, what should you look for in a tech solution that will support your mid-level program (and other donor giving levels)? While there are a host of options out there, let's focus on the GivingDNA platform from Pursuant as an example and review a few case studies to learn how organizations have benefitted from its use.



THE
POCKET
TESTAMENT
LEAGUE®

The Pocket Testament League: *Stopping the Slide*

Between 2017 and 2020, The Pocket Testament League, a Christian nonprofit that distributes printed copies of the biblical New Testament gospels, saw declining orders of gospels. Revenue was sliding, so the organization turned to GivingDNA to learn which constituents to target in a phone campaign.

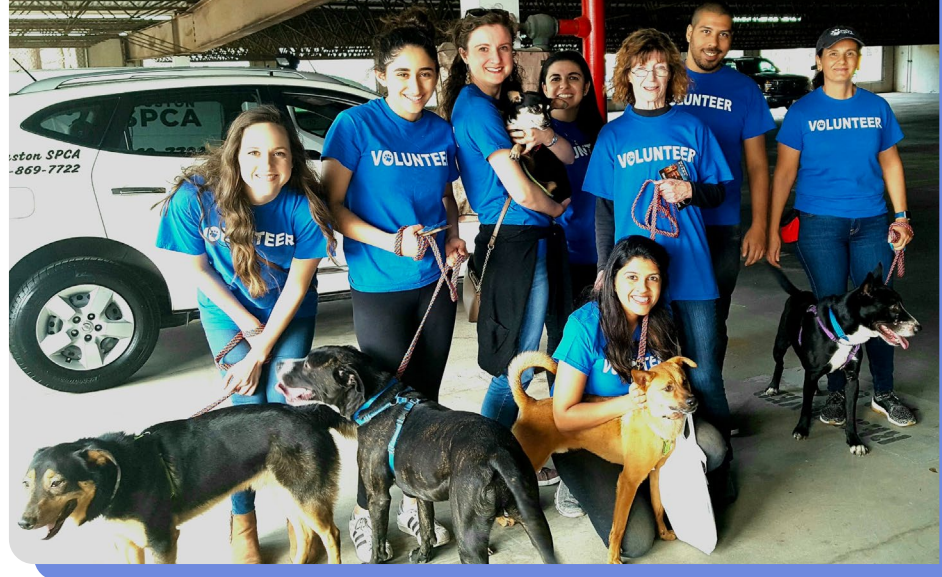
The move **added approximately 85 new mid-level donors** to The Pocket Testament League's call list, as well as a **34 percent jump in the average gift contributed post-call**. **YOY revenue rose 26%** due to a higher number of gospel orders.

Second Harvest Middle Tennessee: *Rapid Identification of Major Donors*

The pandemic compelled many to donate to regional food banks like Second Harvest Middle Tennessee, swelling the nonprofit's file. The organization was struggling with wealth screening as it worked to identify and prioritize the prospects with capacity to become major gift donors or to increase the size of their contribution.

The time-consuming task was quickly streamlined with GivingDNA. The platform produced a refreshed portfolio that allowed the nonprofit's major gift officers to replace assigned donors who had been underperforming with top prospects. **The focused time and attention on these key prospects netted Second Harvest Middle Tennessee a YOY revenue jump of 70 percent.**





Houston SPCA: *Strengthening the Connection Between Donors, Mission, and Organization*

As schedules and work environments shifted to accommodate remote and digital lifestyles, public interest for new pets or animals to foster rose, according to many studies. This heightened demand strained the Houston SPCA, one of the nation's leading animal rescue and protection organizations, and the nonprofit sought a fast, efficient solution for evaluating key donors. But, above that, Houston SPCA wanted to better understand their audience: what drew them to the organization, what's kept them engaged, and, more importantly, how to maintain that engagement.

In fewer than fifteen minutes, the nonprofit attests, GivingDNA had identified where Houston SPCA should invest its resources, as well as informed its messaging and the channels and groups that should receive the communications. An initiative that would have otherwise taken weeks and months to set up was accelerated, and the organization had a robust profile of prospects to target.

The results have been nothing short of astounding. **Four families that had never donated more than \$2,500 in prior years gave \$100,000 each, and dozens increased their giving to \$10,000 and above.** Most critically, **donor engagement has surged 26.8 percent**, improving Houston SPCA's chances at retention.

THE ULTIMATE GUIDE TO MID-LEVEL GIVING



PART 4

How to Design a Communications Plan for Your Mid-Level Giving Program

PURSUANT. 

GivingDNA. 

In earlier installments of this series, we established how **mid-level donors are a special class.**

They're more loyal (and thus more predictable) than other groups, and they offer a pool of supporters to funnel into your **major gifts program**.⁸ They deserve a communications plan tailored to their unique characteristics, so we've identified factors to keep in mind as you design a plan meant to speak to them.



But first, a reminder.

In all your communications — from your mass-market audience engagement to your major gift donor cultivation — remember the importance of personalization. As we noted previously, **59 percent of donors** surveyed by Accenture⁹ in 2017 said **personalization would raise their donations by 10 percent, while 8 percent said it would increase their contribution by up to 50 percent more.** It literally pays to personalize your communications, but you can't just add the recipient's name in a greeting and call it a day. Effective personalization means tailoring your message to a constituent's unique interests — why they give to you, their donation or volunteer history, where they live, and so on. With the right data in place, the possibilities are endless.

And, because you want to groom your mid-level donors for the high-touch, ultra-personal communications that characterize relationships at the major gifts level, acclimating them to hyper personalized outreach before they move to that level is key.



59% said **personalization would increase their donations** by



10%



8% said **personalization would increase their donations** by



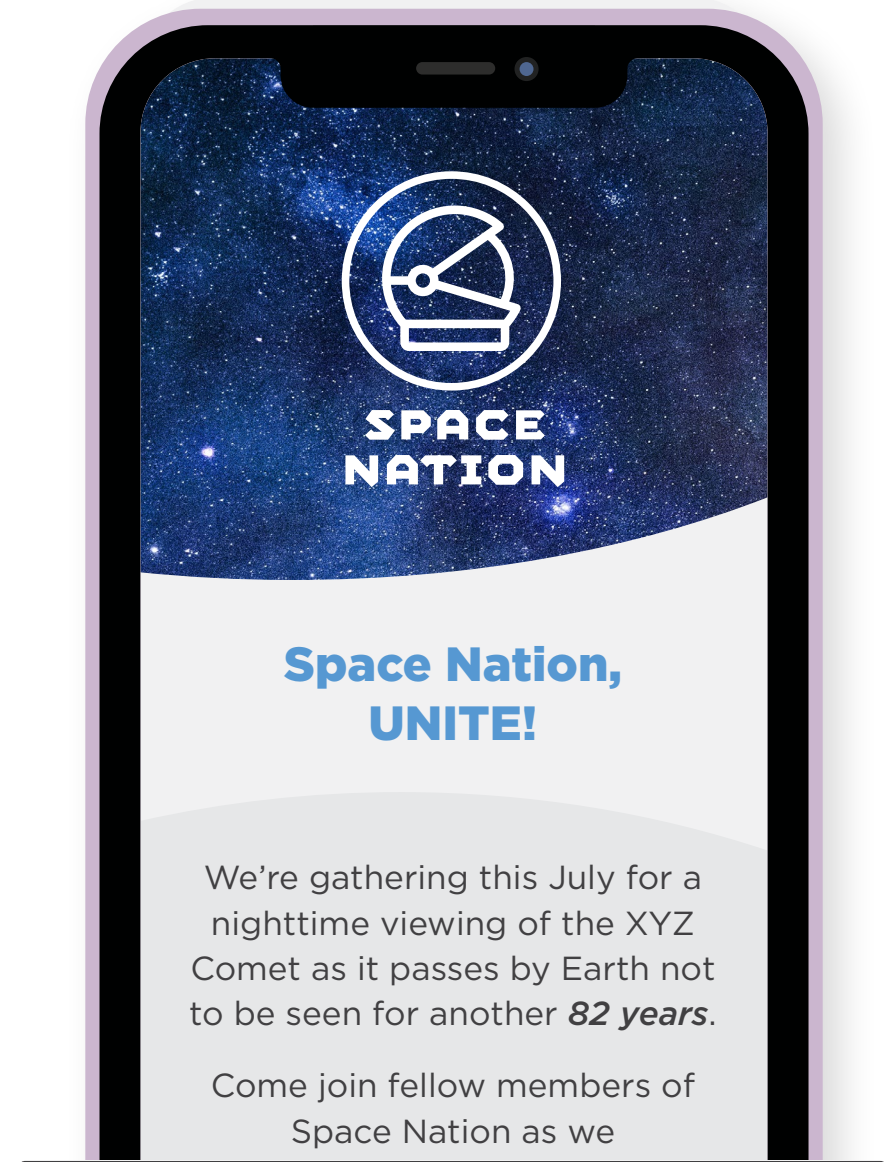
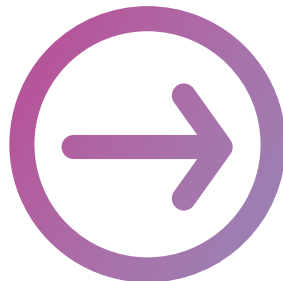
50%

Emphasizing Community Through Branding

Also important to mid-level donors is community and connection. We've seen it be especially meaningful to this group of donors, which is why a branded program can be so beneficial.

And, by naming it, the program moves from being an internal initiative to one that's externally recognized. If yours was an astronomy association, for example, you could call your mid-level program Space Nation, a play on "space station," and inject a bit of whimsy and personality to the group.

Branding also provides an opportunity to craft a special logo that quickly communicates the program visually. You can reinforce this visual message by repeating it in your copy:



Taking It Slow

But remember: You don't have to create a special society or group for your mid-level donors. You may already have a branded monthly sustainer program, for instance, or one reserved for those super contributors who donate transformative amounts to your organization. Creating another branded donor program could generate one more than is necessary.

In other words, it's OK to keep your mid-level donors in direct marketing sent to your annual fund. You may only need to change one or two touches that elevates their experience from the one designed for your mass-market audience. You might, for example, alter the frequency of your communications — in addition to your monthly outreach, maybe you send a quarterly newsletter containing exclusive information just for them and refrain from donation appeals. “Be brave about limiting your asks,” says Kristin Priest, vice president of client strategy at Pursuant. “Make them really good and deeply impactful.”

And some of your mid-level donors may have indicated that they'd prefer less, not more, communication from you. Honor those requests, as uncomfortable as that may be. “It can be scary, because no one wants to turn off their email or direct mail marketing,” says Ryan Carpenter, vice president of client success at Pursuant. “I'm not saying offer that up, but whenever we have a chance to talk to someone, we always want to understand their preferences.”

On the positive side, when those requests have been fulfilled, Pursuant found that donors “gave more on average every year,” says Carpenter. “I can't remember a time when that wasn't the case.”

Of course, size also matters. The number of donors who meet your criteria for a mid-level program could be too large for your mid-level officer or team to transfer to a personal communication track. Instead, identify as many of the highest priority donors as you can manage and funnel them to that track. “If it's everybody on your mid-level list, fantastic,” says Carpenter, “but if it's only twenty-five of your best mid-level donors, that's a great start too.”

Again, it's OK to move more slowly.

You don't need to make drastic changes, and you don't want to stray too far afield from the communication tactics that brought your mid-level donors to where they are today.





*To create your list of mid-level donors, you hopefully **leveraged data and technology**. Now, you can use the same tools and platforms to glean insights about your mid-level donors.*

Data-Powered Communications

To create your list of mid-level donors, you hopefully leveraged **data and technology**.¹⁰ Now, you can use the same tools and platforms to glean insights about your mid-level donors. Do they tend to live in certain types of areas — rural versus urban locations, for example? Have they participated in surveys where they told you which of your programs interest them? For instance, if your nonprofit offers animal protection and rescue services, did they show greater interest in puppy adoptions versus programs for fostering kittens?

This data can inform your communications, both visual and written. If you know which donors showed interest in puppy adoption programs, for example, you might use images of puppies in your direct mail campaigns to them, and your copy could tell the story of an abandoned puppy who found a home with a family that had recently lost their beloved hound.

That's an example of data in service of personalization. **At the very least, you always want to use data to automate a personalized greeting.** “Dear Tommy” versus “Dear supporter” will always land better than a generic salutation, so try whenever possible to greet donors by name.

Watch What You Say: You/Me/We Language

Are donors at the center of your communications? The language you use in your outreach will answer that question. Here's what we mean:



Language

“Thanks to you, 47 families in our community were able to...”

This kind of wording centers the donor experience. It shows the impact their contributions and involvement have had. You can complete the sentence with quantifiable metrics, and don't worry—you don't need to write a novel. It just has to illustrate the effects of the donor's participation and support.

Be sure that it doesn't feel transactional, though. “It's not, ‘Here's what your \$300 will buy.’ That'll make them feel like customers,” says Priest. “It's more about something they can help accomplish, not purchase.”



Language

“In 2021, the Fund for New York City achieved its goal of...”

This kind of wording puts the focus on your nonprofit. It's traditional marketing language that explains why donors should support your organization. “It's what comes most naturally to organizations, and it's worth keeping because it builds trust,” Priest says. Nonprofits often overuse it, however, so temper where and when you apply it.



“Together, we can provide hope and safety to victims of domestic abuse.”

This kind of wording builds community, which, as we noted earlier, is a meaningful element for mid-level donors.

Pursuant and others in the field find that the you/me/we language is important in ensuring donors at all giving levels feel a strong sense of ownership in helping produce clear solutions.

For organizations that may not have a dedicated mid-level giving officer strategizing curated experiences, ensuring the right voice is critical because their print and digital communications have to speak for them.

“Our hypothesis is that the mass market and annual fund groups benefit from a more general level of information and engagement, while major donors have the benefit of really personalized experiences and relationships,” says Whitney Norman, vice president of client solutions at Pursuant. “So, at the mid-level, the significance of this you/me/we language is elevated.” Besides the importance of community that we discussed earlier (“Together, we...” language, for example), **mid-level donors want to understand the impact that their contributions have** — “You made XX happen” language. When organizations miss the mark by using me-focused language (“ABC nonprofit accomplished...,” for instance), mid-level donors are at higher risk for feeling uninspired and disengaging.

Tying It All Together: Key Communication Elements

While the following list isn't exhaustive and may not apply to every message, it offers good guidelines for what your communications should encompass.



1. Personalized greeting.

Beyond including this in the salutation, incorporate it into the body of your communications, be it email, postcard, or web page. The message should be tailored to the donor throughout the copy. **We can't stress the importance of personalization enough.**

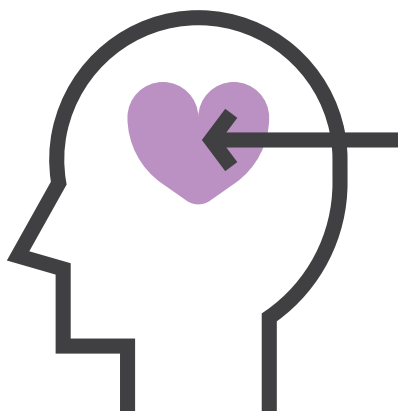


2. The hook.

What will “hook” your reader in — why are you writing? This is where mid-level communications teams can struggle, so create a communications calendar or draw from an existing one developed by colleagues in major gifts. That will help you understand, build on, or reference the current donor experience. Think, for example, of what they may have recently experienced through channels like:

- ▶ **Social media.** Is there a phenomenon like the ALS ice bucket challenge or viral post that your organization can jump on? Is there a social media campaign your own nonprofit is currently running?
- ▶ **News reference.** This is a good way to show that your organization is making waves — something like, “Did you see the [put your local TV station or other media outlet here] story about our [put your initiative or program here]?”
- ▶ **Direct mail.** What have your teammates in development and marketing sent recently?
- ▶ **Events.** Is there an upcoming event that you can call their attention to?

You may be writing a simple stewardship or thank-you email or letter and won’t need a hook, but these can be good prompts when you’re trying to cultivate a relationship.¹¹



3. Donor impact.

When you’re writing in response to a gift, thank you isn’t enough. Tell them the impact that their donation will or did have. Sometimes that will be statistics or other success markets; sometimes the impact is more abstract: “I wish you could have been in the room with me when I told our doctors and nurses that this year’s donations — your gift — means we can continue serving the unhoused population of downtown Los Angeles free of charge.”

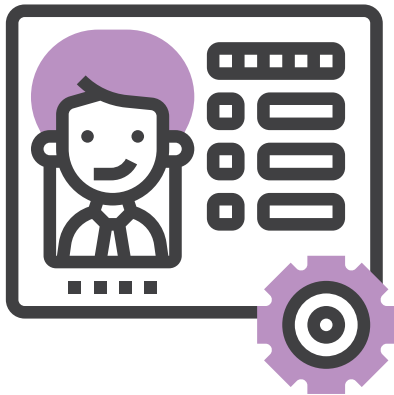


4. The perk or special experience.

Is there a benefit or special offering you can extend to draw them closer to your organization — maybe a resource, invitation to a mid-level-only webinar, or link to a landing page built just for them? **The key is limited access.** You want to surprise and delight your mid-level donors, but neither does the offer need to be hidden or secretive. For instance, are there aspects of the offer that can be highlighted on social media to provide public recognition? “You don’t always have to build an individually customized experience, but you can craft one that’s curated,” Priest says.

Of course, it can be difficult to identify new or appropriate benefits each time, so consider swapping this section out with news about an upcoming drive or other action your organization is undertaking.

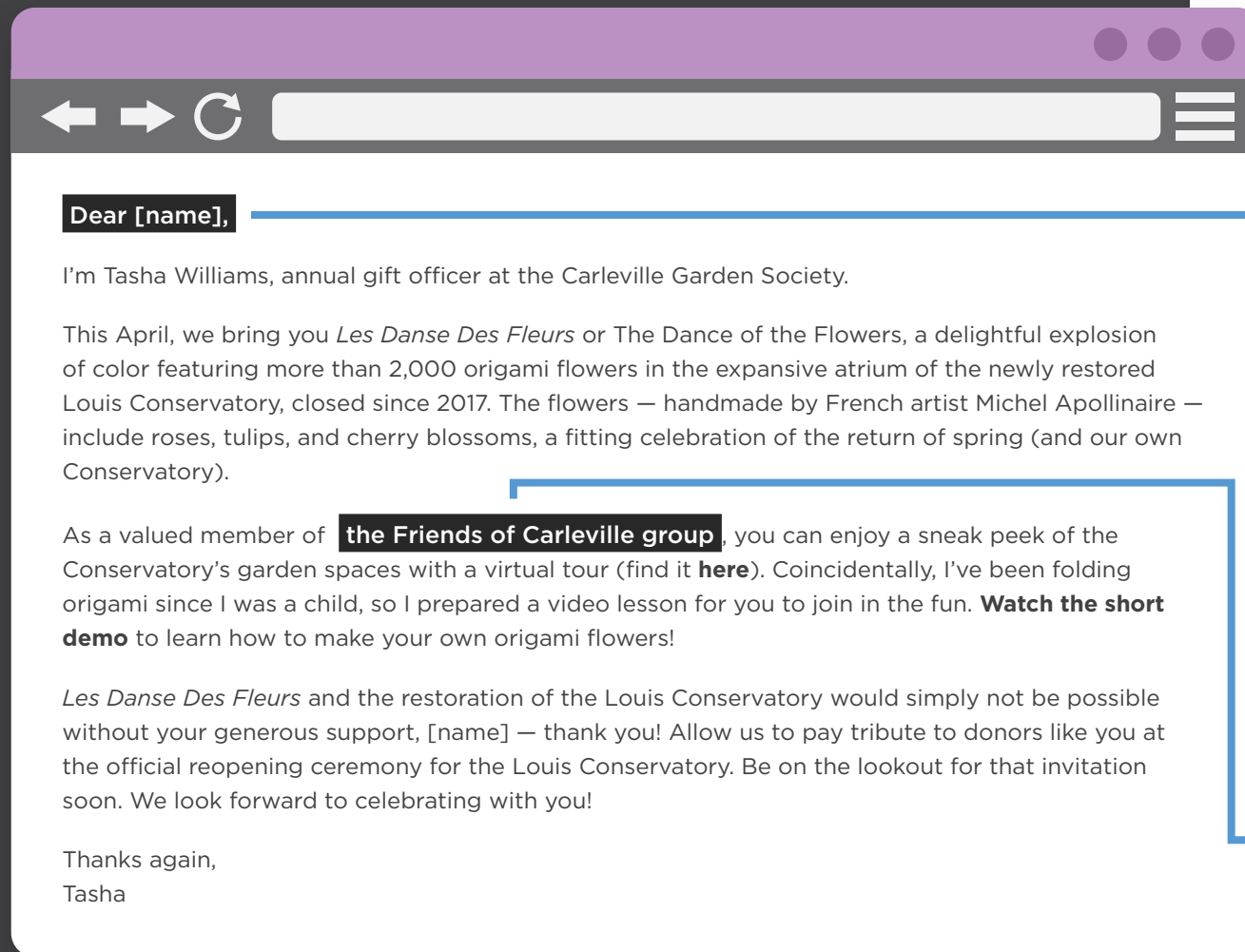
You don’t *always* have to build an individually customized experience, but you can **craft one that’s curated.**



5. Closing.

Offer to be a resource if they have questions or need assistance accessing their benefits. Share your email and cell phone number.

Now let's look at a couple of examples that show these communication elements in action.

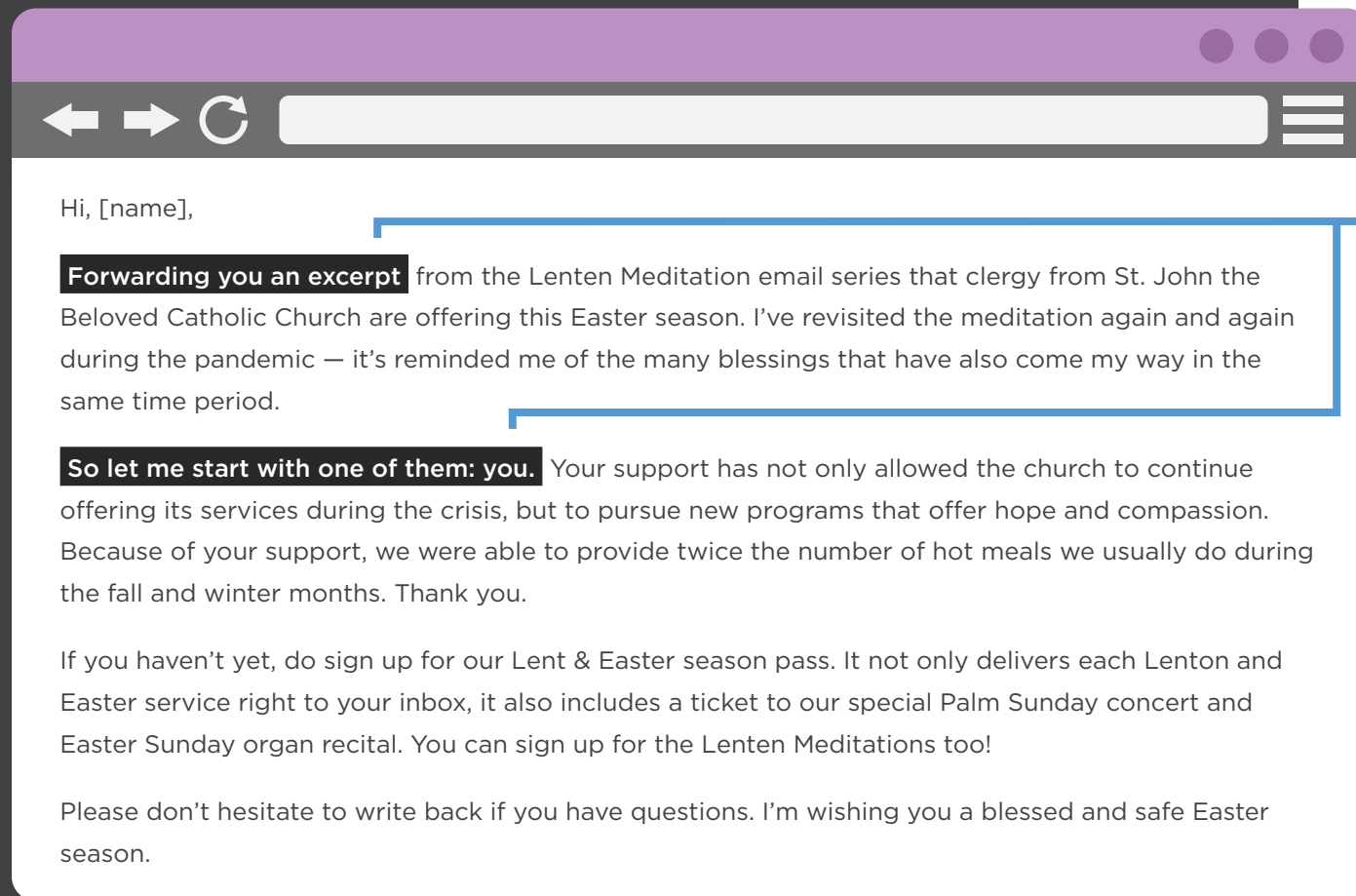


Leverage technology to auto-fill donor names. If that tech isn't available to you, personalize your outreach by immediately offering context. Start with something like, "Because you attended XYZ event, I thought you would..." or "As a longtime volunteer at our beach clean-ups..." — whatever helps them feel seen and valued.

Here, you're calling out the branding of your mid-level donor group.

In this particular case, the gift officer just happened to be an origami enthusiast, so her team took advantage of her expertise and transformed it into a special offering, along with the virtual tour. **It's a great example of developing creative benefits for mid-level donors without expending a big cost outlay.** (Note, too, how the email fueled anticipation for the invitation to the reopening ceremony.)

In the next example, the appeal is more modest but authentically human, which you find in the conversational, less formal voice and tone.



Note the less formal voice. Communications to mid-level donors want to feel human and honest.

Both are simply examples. Refer to them as you develop your own communications and, when possible, incorporate as many of the pointers we've shared here. We'd love to hear about your experience, so don't be shy about sharing your excitement over positive growth or lamenting more sluggish responses. **With decades of experience under our belt, we've been through the highs and lows of fundraising and are here to celebrate your wins, as well as problem-solve thorny issues.**

Looking for ways to identify the best candidates for upgrading to a mid-level or major gift?

The GivingDNA platform was built to help time-strapped fundraisers understand the giving motivations, behaviors, and attributes of their most passionate donors and then create targeted segments to engage them. Learn more and get a demo here:

pursuant.com/midlevel

Pursuant, an Allegiance Group company, is a marketing and fundraising firm dedicated to helping nonprofit organizations increase the visibility of their mission, engage with constituents, acquire new donors, and drive donor loyalty. GivingDNA is a wealth screening and data analytics platform. Together, Pursuant+GivingDNA leverage analytics to inform marketing and fundraising strategy with impactful creative and messaging.



214.866.7700
info@pursuant.com

- 1** “Quarterly Fundraising Report™ Year-to-Date Nonprofit Sector Trends,” *Fundraising Effectiveness Project*, Q4 2022, <https://data.givingtuesday.org/fep-report/>, Accessed 21 Apr. 2021
- 2** Meyer Partners, “5 Keys to Successfully Cultivate and Upgrade Mid-Level Donors,” *Nonprofit Pro*, n.d., <https://www.nonprofitpro.com/promo/5-keys-successfully-cultivate-mid-level-donors/>. Accessed 24 June 2021.
- 3** Sylvia Brown, “As Donors Return to Old Patterns of Giving, Here’s How to Ensure Nonprofits Get the Resources They Need,” *The Chronicle of Philanthropy*, 24 May 2021, <https://www.philanthropy.com/article/as-donors-return-to-old-patterns-of-giving-heres-how-to-ensure-nonprofits-get-the-resources-they-need>. Accessed 3 June 2021.
- 4** “Personalization Pays Off When It Comes to Fundraising,” *Associations Now*, 30 Nov. 2017, <https://associationsnow.com/2017/11/personalization-pays-off-comes-fundraising>. Accessed 12 March 2022.
- 5** “Personalization Calls to Action Perform 202% Better Than Basic CTAs,” *Hubspot*, 28 June 2018, <https://blog.hubspot.com/marketing/personalized-calls-to-action-convert-better-data#sm.000awoxgniktcoi11jl2et1nit4os>. Accessed 12 March 2022.
- 6** “Donor Loyalty Study: A Deep Dive into Donor Behaviors and Attitudes,” *Abila*, 2016, <https://www.thenonproffitimes.com/wp-content/uploads/2016/04/Donor-Loyalty-Study.pdf>. Accessed 12 March 2022.
- 7** Berman, David. “How Many Hours Does It Take to Implement and ... - Quora.” *Quora*, 25 July 2016, <https://www.quora.com/How-many-hours-does-it-take-to-implement-and-customize-Salesforce-com-CRM-for-a-small-business-or-non-profit-organization/answer/David-Berman-28>.
- 8** Priest, K. (2019, November 19). Podcast: How to Maximize Your Major Gift Program in 90 Days. Pursuant. <https://resources.pursuant.com/podcast-how-to-maximize-your-major-gift-program-in-90-days>.
- 9** Bratcher, E. (2017, November 30). Personalization Pays Off When It Comes to Fundraising. *Associations Now*. <https://associationsnow.com/2017/11/personalization-pays-off-comes-fundraising/>.
- 10** How to Build a Mid-Level Giving Program: Branding, Metrics, and More. (2022, January 19). Pursuant. <https://resources.pursuant.com/how-to-build-a-mid-level-giving-program-part-3-of-3>.
- 11** 5 Keys to Killer Thank Yous That Retain Donors. (2014, August 5). Pursuant. <https://resources.pursuant.com/retention-upgrade/5-keys-killer-thank-yous-retain-donors/>.