

Middle Child Syndrome

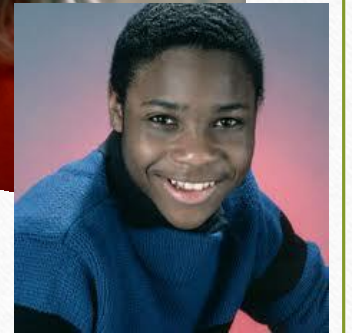
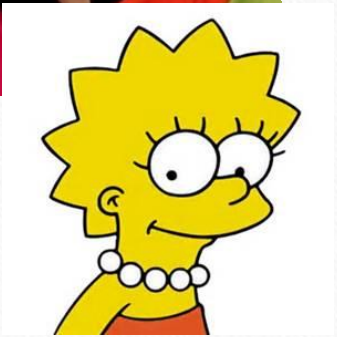
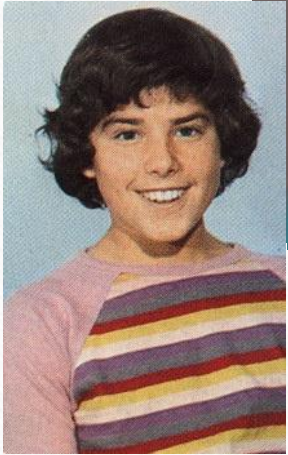
Essentials for Mid-level Giving Programs

June, 20, 2019

MISF Development Seminar/Webinar

What's the plan?

- What is mid-level giving?
- Who are my mid-level donors?
- Let's look at some sample programs.
- Key steps to develop or maintain a mid-level program.
- Why does mid-level giving matter?



Tremendous capacity – 10x their current gift



\$1,000 gift



\$10,000 capacity

Pipeline for major gifts

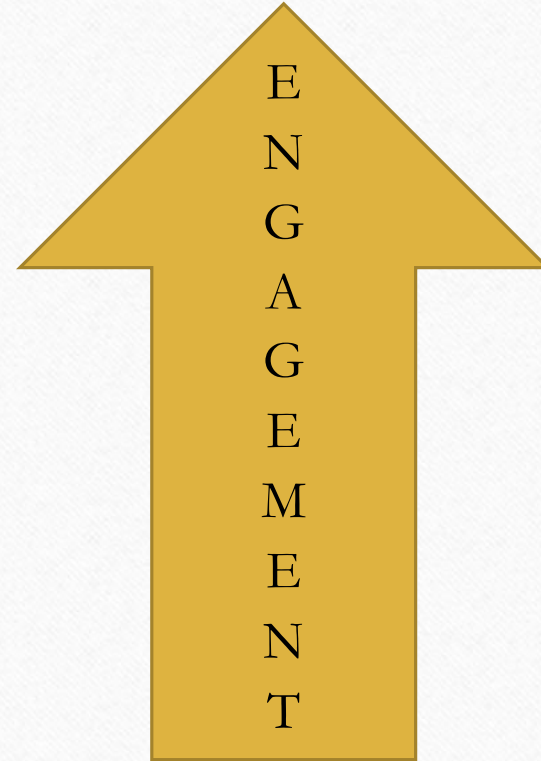
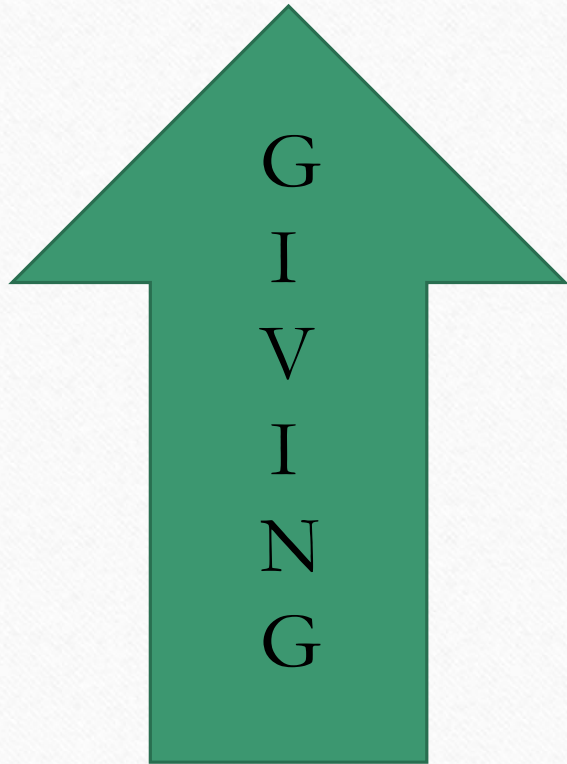


Increased
Giving

Continued
support and
increased
engagement

Major gift
officer
portfolio

Self-identification



Who are my mid-level donors?

- They are typically your most loyal supporters
- They give because they believe they are making a difference
 - They will leave if they are not shown the impact of their support
- Every organization has mid-level donors
 - Organization size does not matter
 - Donor file size does not matter

Pareto Principle: The 80-20 Rule

Your Donor File



Major
Donors
4%

Mid-level
Donors
16%

Case Studies





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- Program started in 2003
 - # of mid-level donors: 2,500
 - Gift range: \$1,000 - \$2,499
 - Staff: 6 part time associates working from home with 350 donors each
 - Strategies:
 - 12-13 mail pieces each year
 - Personalized thank you within 2 days of giving a gift
 - Handwritten notes and messages throughout the year
 - Invitations to U.S. operations events



Lutheran World Relief

- Program started in 2012
- # of mid-level donors: 4,000
- Gift range: \$1,000 - \$4,999
- Staff: 2 staff each with 30 “top tier” donors and 2,000 unranked donors
- Strategies:
 - Meet face-to-face with top 30 donors
 - Personalized thank you.
 - Invitations to special events and quarterly webinars
 - Special focus on International Women’s Day



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- Program started in 2005
 - # of mid-level donors: 4,100
 - Gift range: \$1,000 - \$4,999
 - Staff: 1 full time staff person managing the entire portfolio
 - Strategies:
 - Segmentation of the group
 - Personalized thank you's and messages
 - Regular impact updates – no ask included



Cretin-Derham Hall

- Program started in 2013
- # of mid-level donors: 600
- Gift range: \$250 - \$1,499
- Staff: 1 staff person manages this group
- Strategies:
 - Special acknowledgement in annual report
 - Mid-level branding – logo, letterhead, lapel pin
 - Face-to-face meetings when possible
 - Special mid-level events each year



CATHOLIC CHARITIES
of St. Paul and Minneapolis

- Program started in 2014
- # of mid-level donors: 800
- Gift range: \$1,000 - \$2,499
- Staff: 2 staff people managing portfolios of 400 each
- Strategies:
 - Personalized stewardship throughout the year
 - Timely, personalized thank you's → handwritten
 - Invitations to site tours and CEO lunches
 - Donor surveys

Keys to develop and maintain a mid-level giving program



1. Gather your data

- Determine the criteria for your mid-level and stick to it:
 - Appropriate dollar range
 - Years of giving
 - Engagement
- Number of donors → be realistic
- Keep your portfolio static so you can compare year over year



2. Treat mid-level donors as a distinct segment

- Treating mid-level donors as their own distinct group allows you to:
 - Personalize communication
 - Ask for specific gift amounts
 - Engage donors in meaningful ways – tours, lunch ‘n’ learn events, CEO meet and greets, etc...
 - Allow them to grow in their own time
 - Learn more about their philanthropic goals



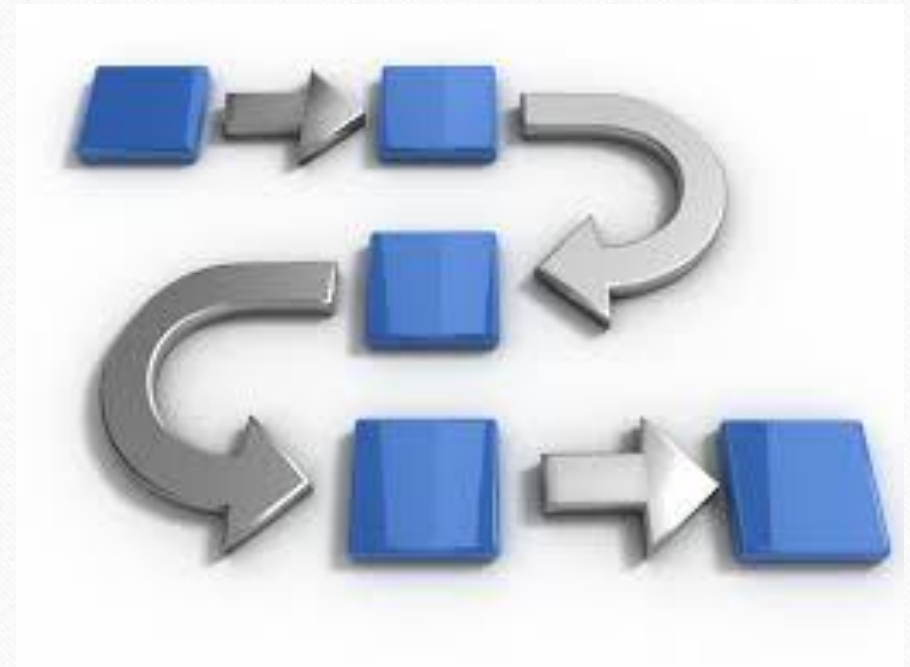
3. Staff your mid-level strategy

- Make your mid-level a priority and hold someone on staff accountable
- Provide your staff with collateral to be successful
 - Client stories
 - News clippings
 - Event invitations
 - Organization updates
 - High quality stationery/ mailing budget



4. Organize the workflow

- Create donors tiers:
 - Top 30 donors should be treated as major gift donors
 - Segment according to giving levels, age, program interest, etc...
 - Segmentation allows for efficiency and personalization
- Create measurable metrics:
 - Number of donor contacts
 - Fundraising goals



5. Immediate and High Quality Thank You

- Develop a system for thanking promptly
- Make a phone call
- SEND A HANDWRITTEN CARD
- Be genuine



6. Provide Exceptional Stewardship

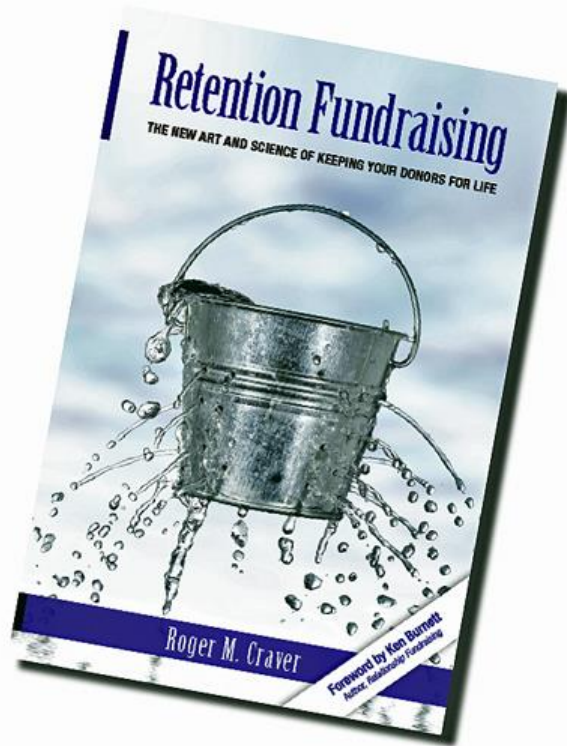
- Make a personal touch to your donors at least every other month
 - Show the impact of their support
 - Send a news or client story
 - Invite them to an event or site tour
 - Write to simply say thank you
 - Surprise and delight (Tom Ahern)



So...

Why do I need to start or
maintain my
mid-level giving program?

Retain your donors



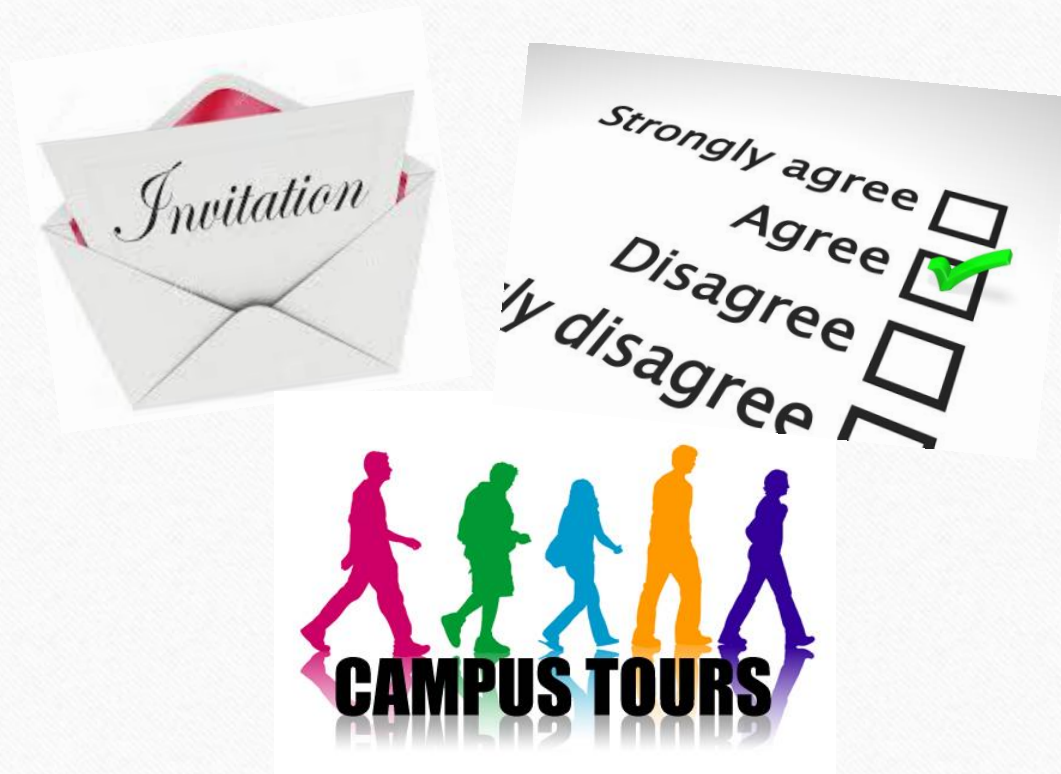
- Save money
- Bring donors closer to your mission → partners
- Give them the very best donor journey

Raise more money for your mission



- Invite your mid-level donor to give more
- Provide a quick, quality thank you
- Show them the impact of their gift
- Invite them to engage
- Watch philanthropy grow

Engage your donors



- Let them know you care
- Make them feel essential to your success
- Show impact in person
- Ask for advice and feedback

Invest in your future financial security



- Diversify your funding stream
- Create a pipeline of major and planned giving donors
- Learn from your donors to make your processes better

Resources for more information

- Veritus Group – Jeff Schreifels and Richard Perry
- Pareto Fundraising – Sean Triner
- The Agitator – Roger Craver and Tom Belford
- Sea Change Strategies – Alia McKee and Mark Rovner

Questions?

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