

The Power of Mid-Level Giving

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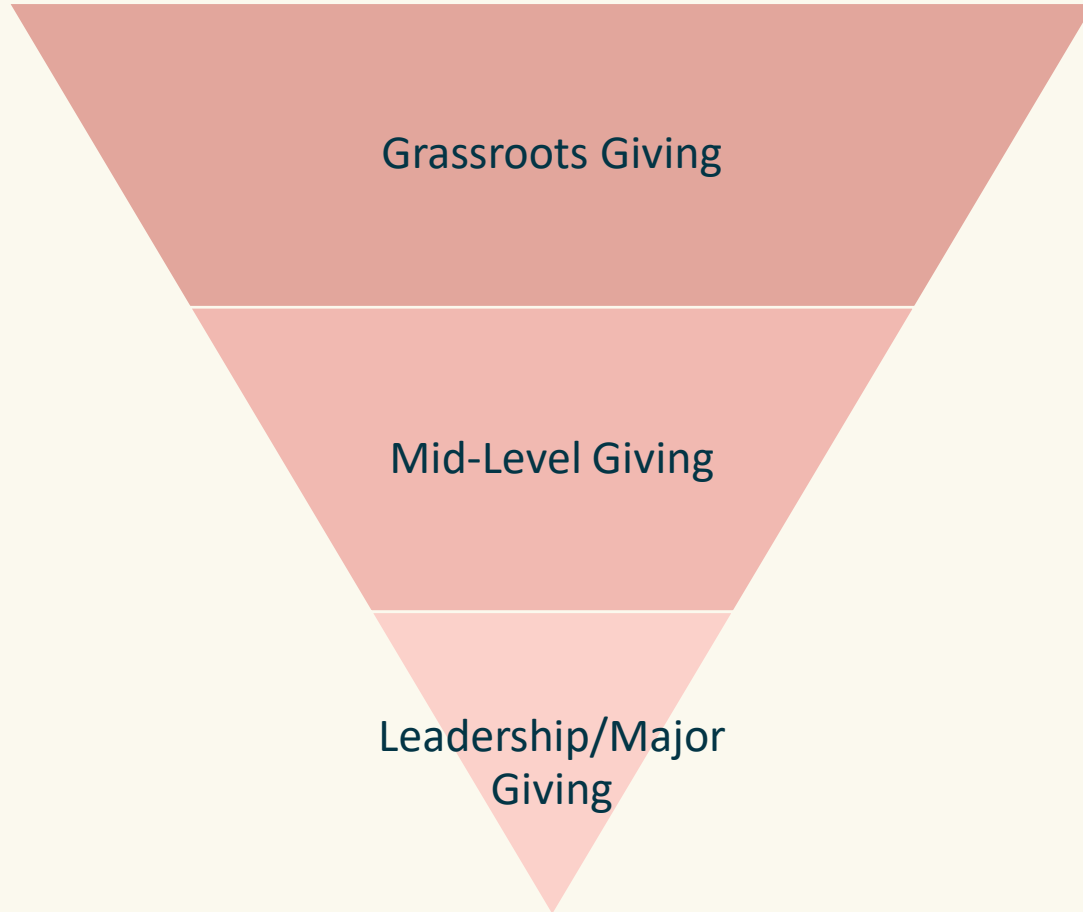
Agenda

- What is mid-level giving?
- Why have a mid-level giving program
- How to build a mid-level giving program





Individual Donor Pipeline



- 1:some vs. 1:1 or 1:many
- Getting to know our donors and why they give
- Introducing them to our work more deeply



What “counts?” It depends!

- How much time do you have?
 - What feels like a significant gift to you personally?
 - What makes sense in the context of your org’s donor base?
- Consider:
 - High wealth rated folks not yet giving major gifts to your org
 - Loyal donors/high lifetime value donors
 - Donors who made a major gift then lapsed
 - Donors MGO has not yet been able to qualify

Why Mid-Level Giving



More resources for your mission

- Keep (retention rate)
- Lift (average gift size)
- Move (to major gifts)
 - 2-3% of mid-level donors /year

Sample calculations

	Year 1	Year 3
# in Portfolio	600	600
Total Revenue	\$880,000	\$1,110,000
Retention Rate	52.9%	59.1%
Average Gift Size	\$103	\$124
Moved to MG	18	54



Align with your values

- **Break down silos within the team**
 - REALLY understand direct mail
 - Improve segmentation of digital marketing
 - Formalize portfolio management & business protocols
 - Source for new leadership donors
 - Capacity to handle less engaged leadership donors
 - Corporate volunteers -> personal supporters
- **Make volunteerism accessible to all**
 - Thank you calls
 - Personalized notes
 - Donor research for database cleanup
- **Treat all donors well, but not the same**
 - Donors know our time is valuable – they may be more concerned about this than you are!



Job satisfaction & career growth

- Learn major gifts skills in a lower stakes way
- Career growth into MGO role, potentially even with the same donors
- Demand as more nonprofits start mid-level programs
- It's fun to connect meaningfully to donors!
- Get volunteers and board members more comfortable with fundraising

How to build a mid-level program



Are you ready for mid-level?

- You have grassroots donors and an acquisition/retention strategy for them
- You have a major gifts program (or are starting one at the same time)
- You have a system for collecting impact stories or are willing to create one



The Math

- 1 FT MLO caseload = 600 donors
- Tier A (10%), B (25%), C (65%)
- Introduction Series
 - Letter, 2-3 Call attempts, Survey, Closing Note
 - Go until you reach them or have tried all your touchpoints
 - What interests them about the org's work?
 - What is the best way for me to personally communicate?
- ~6 semi-personal scheduled touchpoints per year on top of DM and thank you's
- 1/3 will be happy to hear from you
- 1/3 you won't be able to reach – keep them in your portfolio!
- 1/3 will not want to hear from you further – remove them



Sample Activities

- Thank you calls
 - Learning from your donors how they would like to engage
 - Personal or “personal” email
 - Handwritten notes
 - Exclusive small group experiences (tours, volunteer shifts, CEO briefings)
 - Impact & Need Stories
- What is it NOT?
 - Printed mail – layer it on top of your direct marketing!
 - Direct solicitation
 - Highly personalized



Resources



Veritus Group is a mid, major, and planned gift training and consulting agency. They offer both free and paid resources and thought leadership to help you start and sustain a mid-level program.



This training content was developed in partnership with Feeding America and Aperio Philanthropy.

Go to feedingamerica.org to learn more about how Feeding America is supporting food banks across the country to realize their vision of an America without hunger.



Aperio Philanthropy partners with nonprofits around the country providing hands-on fundraising consulting to help organizations grow and thrive. Go to aperiophilanthropy.com to learn more.



Discussion

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