

SEPT. 27, 2023

What to do at year-end to cultivate mid-level donors



Our Expert Speakers



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Architecture



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Corporate Social Responsibility

CyberGrants  WeSpire 

Fundraising and Engagement

 everyaction  Network for Good.

GiveGab  salsa  Mobilize

 ActionKit  DONORTRENDS

Case Management

 Social Solutions

are now part of

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We power those who power social impact.

Agenda



Why mid-level donors matter



Giving clubs



Personalization



Appropriate tagging



Rewarding mid-level donors



Assigning staff



Mid-level giving is for everyone

How you define mid level donor is specific to your organization

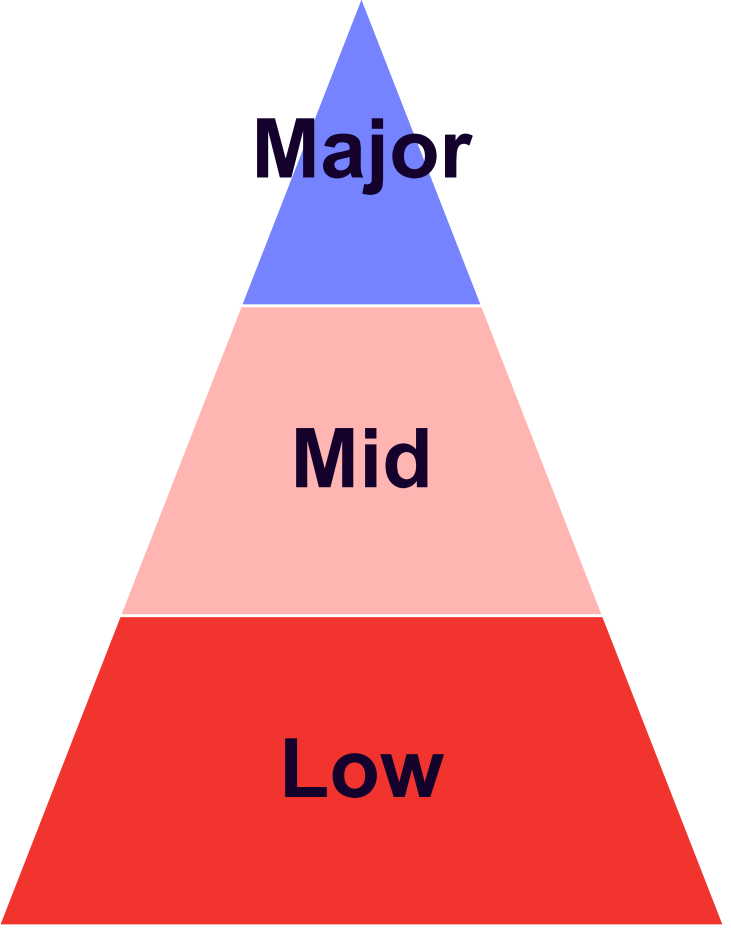
- Set a threshold so you can measure your results.
- Remember, mid-level donors are NOT your average donors.
- Consider cumulative giving

Every organization can have a mid-level donor program

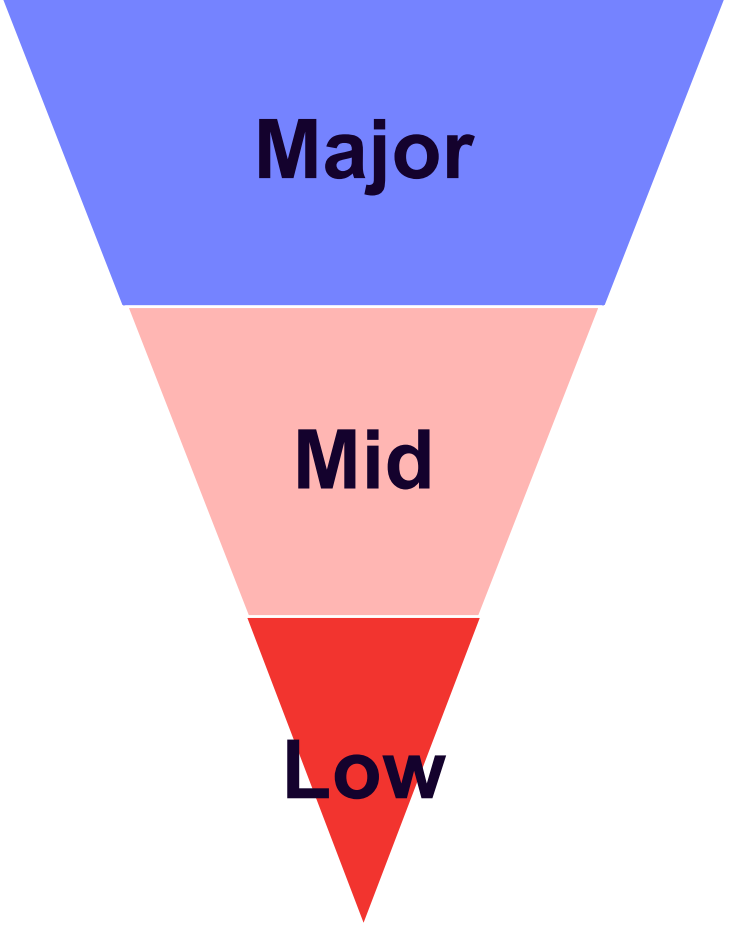
- If your organization is smaller, it just means the potential pool of mid-level donors is greater
- Mid level donors a crucial component of the major giving pipeline



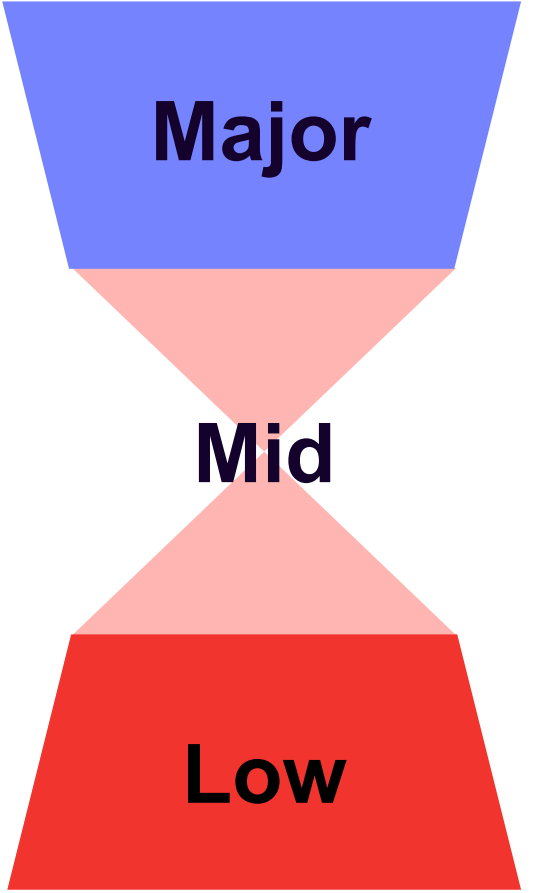
Donor Pyramids



1.



2.



3.

Giving Levels

Many organizations create various levels that they assign to donors based on yearly giving.

- Branded levels are better than generic
 - What is important is that you have levels and names. Please don't waste countless staff hours fretting over the specifics. That won't move the needle.
- This leveling should NOT include all donors
- It SHOULD include your mid-level donors.
- Be generous with credit when assigning levels
 - For example, include employee matching giving

BUT...



Giving levels are worthless if donors don't know they exist

Giving levels are worthless if donors don't know that they are at a certain level.

Giving levels are worthless if donors don't know why they should care that they are at a certain level.



Annual Report



At many organizations, the annual report is the only time that donors find out what level they are at.



Simultaneously, many organizations are limiting who receives an annual report, excluding mid-level donors.



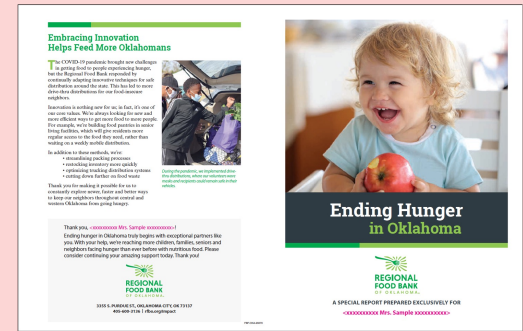
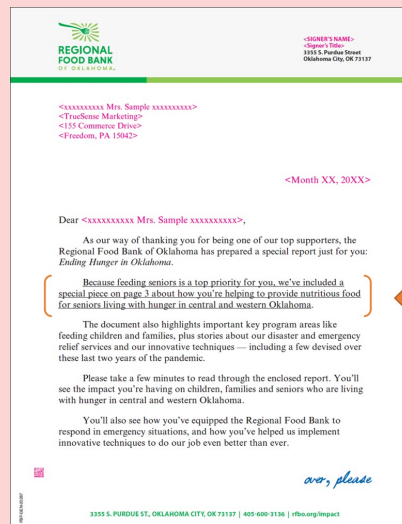
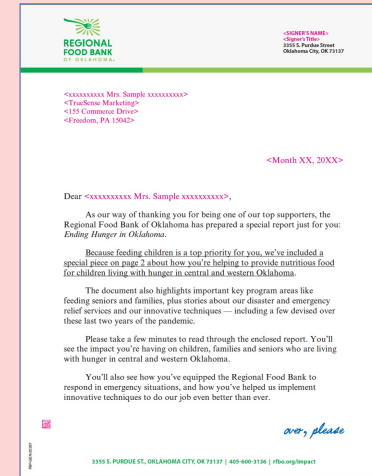
Thus, mid-level donors never actually learn they are assigned to a donor level at all.



Key Considerations

Single or multichannel?
One appeal or several? Each can work if done correctly.

- Stand out in the mailbox.
- Personalize when you can.
- Reiterate their importance through highly affirmational copy.
- Create a holistic look-and-feel in both channels.



Because feeding children is a top priority for you, we've included a special piece on page 2 about how you're helping to provide nutritious food for children living with hunger in central and western Oklahoma.

Because disaster relief is a top priority for you, we've included a special piece on page 2 about how you're helping us to respond quickly to urgent, unexpected needs.

Because feeding families is a top priority for you, we've included a special piece on page 3 about how you're helping to provide nutritious food for families living with hunger in central and western Oklahoma.

Because innovation and efficiency are top priorities for you, we've included a special piece on page 4 about how we're implementing new methods to make our work more effective, getting more food to those who need it most as fast as possible.

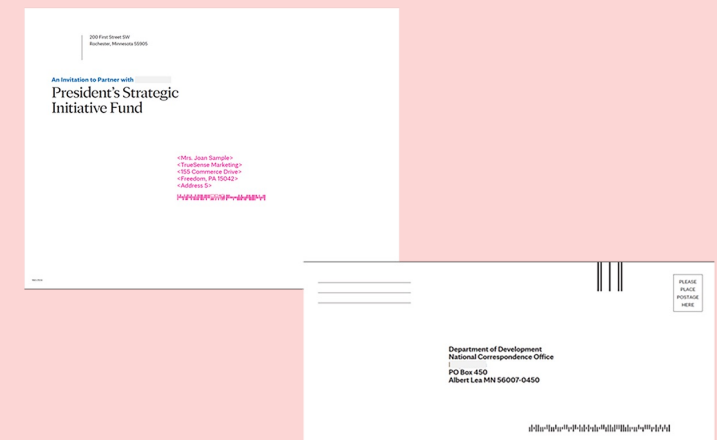
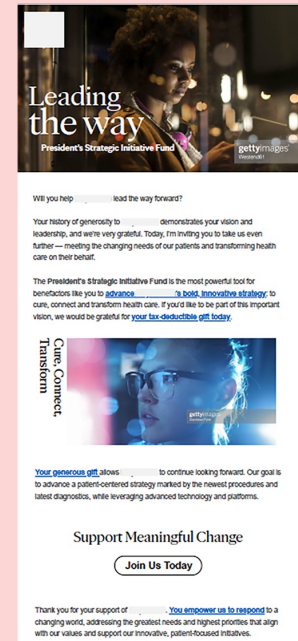
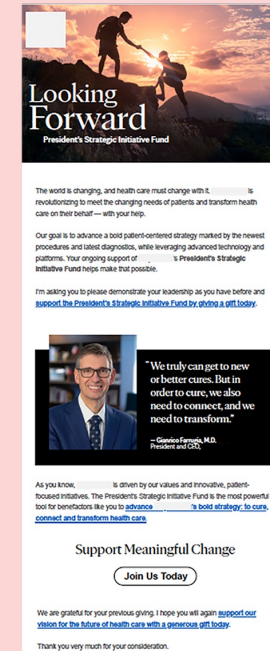
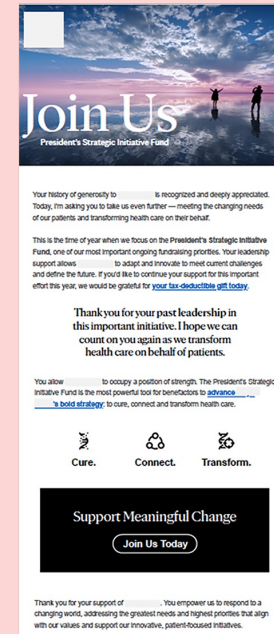
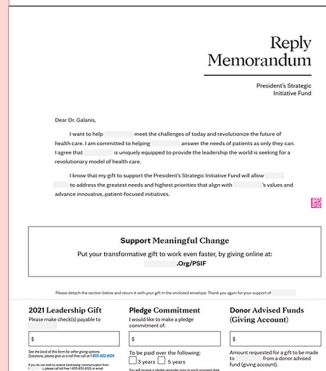
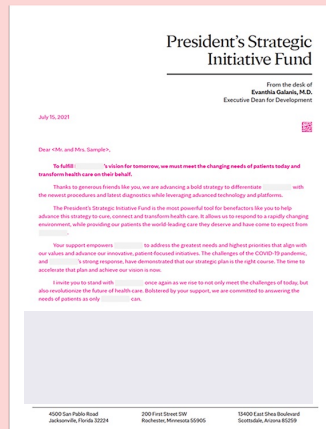
Your exceptional partnership is having a profound impact in several key program areas in the fight against hunger, including:

- Food for Kids
- Food for Seniors
- Food for Communities
- Food for Health
- Emergency Relief
- Innovative Techniques

Key Considerations

Provide the donor with lots of information about the program or need, and their impact.


- Impact Report
- Informational Landing Page
- Downloadable PDF



Key Considerations

Have a compelling reason for asking for the donor's help.

- A match.
- A specific program or need.
- Something of proven interest to the donor.
- Use direct response tactics like deadlines, countdown timers, etc.




Take Advantage of the Spring Challenge for Your Gift to Have Double the Impact

Dear Patty,

The health care environment is changing rapidly, and advances in technology, data-driven knowledge and new patient needs will define the next generation of care. As the authority in medicine, [redacted] sees these challenges as an opportunity, and feels an obligation to lead a revolution in medicine that will bring hope and healing to patients regardless of location. **Because of friends like you, we are in a position of strength to usher in this transformation.**

Inspired by this transformational vision, a generous benefactor has recently come forward with a gift of \$100,000 to support our commitment to innovative clinical practice and research. They have also challenged our community to join these efforts and **raise an additional \$100,000**. Imagine the impact we can have if we join together to help deliver new and more advanced medicine!

Your gift to the spring challenge will have twice the impact in support of our strategic priorities, and it will help establish the next generation of medicine.

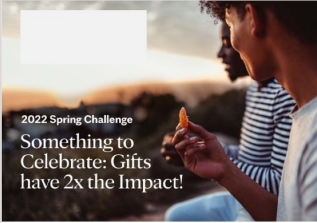


Read more about the \$100,000 Spring Challenge and the power of your philanthropy.

[Download Now](#)

Please accept our thanks for being a vital part of the community, and for your generous support.

Sincerely,



2022 Spring Challenge

Something to Celebrate: Gifts have 2x the Impact!

A generous benefactor has given a gift of \$100,000 to support [redacted]. I'm writing to remind you that they have also challenged us to raise an additional \$100,000 from benefactors and friends like you before July 31.

Patty, your gift to the spring challenge will have twice the impact to help advance innovative research and patient-centered care. It will also help [redacted] lead the way into the next generation of medicine.

These last few years have been a powerful reminder to all of us how the world relies on [redacted] for answers, for hope and for healing. That hope, in turn, is only possible because of the support of benefactors like you!

27 : 05 : 05

Days Hours Minutes

[Give Now](#)

Patty, your connection to [redacted] demonstrates your deep belief in our mission to provide the very best care through breakthroughs in research and clinical practice. **You understand that philanthropy is essential to carry out that mission, and we are grateful for your support. That's why I am asking you to give a gift today**, to help usher in the next generation of care when it is needed most.

Thank you so much.


Sincerely,

iOS Fallback Display

Deadline:
July 31

Post Match Display

The challenge opportunity has ended, but your support still makes a difference. **Please give today!**



Dear Patty,

The deadline for joining our benefactor's challenge to raise \$100,000 is approaching quickly.

If you have already given a gift to help meet this challenge, thank you very much as we appreciate your generous support. **If you haven't yet given a gift, I hope you will do so now.** Your gift will have twice the impact to support innovative clinical practice and research at [redacted].

We are grateful for your support. Our benefactors play a critical role as [redacted] leads the way into the future of health care.

Please give now, when the impact of your gift will be doubled. Thank you very much.

Sincerely,

Key Considerations

Offer multiple ways to give.

- Mail
- Online
 - Mid-Level ask-array
 - Dynamic ask-array
 - Branded ask-array
 - Don't downgrade!

Gift Details

\$ 250	\$ 500	\$ 1,000	\$ 2,500	\$ 5,000	Other
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Gift Details

\$ 1,000	\$ 2,500	\$ 3,500	\$ 5,000	\$ 7,500	Other
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The screenshot shows a donation form with a modal overlay. The modal has a blue header with the text "Thank you!" and a close button. Below the header is a photo of a family (Andre, a Roswell Park patient, and his family) with the caption "Andre, a Roswell Park patient, and his family". The main text of the modal asks: "Before we process your gift, will you consider becoming a monthly Roswell Park donor? By making a \$10 monthly gift, you will do even more to advance the latest in lifesaving cancer research and patient care. Thank you!". There are two buttons: "Yes! I would like to become a \$10 monthly donor." and "No thanks, please process my one-time gift.". Below the buttons is the text: "You are able to change or cancel your monthly gift at any time." The background form shows fields for ZIP/Postal Code (15206), Country (United States), Payment Info, Credit Card Number (4111111111111111), Expiration Date (01/20), and CVV Number (111).

Key Considerations

Offer multiple ways to give.

- Mail
- Online
 - Mid-Level ask-array
 - Dynamic ask-array
 - Branded ask-array
 - Don't downgrade!
- DAFs, stock, planned giving, etc.
 - Ways to give *to the campaign*
 - Ways to give/get involved *after the campaign gift*

Dear Patty,

I want to thank you for your recent gift to [REDACTED]. We truly appreciate the trust and commitment you've shown to [REDACTED] through your history of generosity.

It's because of that dedication that I would like to give you more information about supporting [REDACTED] through Donor-Advised Funds (DAFs). If you would like to discuss other giving options, we would appreciate the chance to connect with you! We would also be happy to answer any questions you may have about [REDACTED] and our funding priorities.

For more information, please click the link below. It will take you to a brief form where you can tell us what you'd like to know more about. We will get in touch with you as soon as we can.

[Let's Continue the Conversation](#)

Once again, Patty, thank you for your support of [REDACTED], and particularly for your recent gift. We are very grateful.

Sincerely,

Thank you for your generous support!

Thank you again for your recent gift. We appreciate the opportunity to continue the conversation. Please let us know what interests you. We will be in touch soon!

Donor-Advised Funds (DAF)

Please contact me to continue the conversation

First Name * Last Name *

Email Address * Phone Number

I would prefer to be contacted by:
 Email Phone

Thank You!

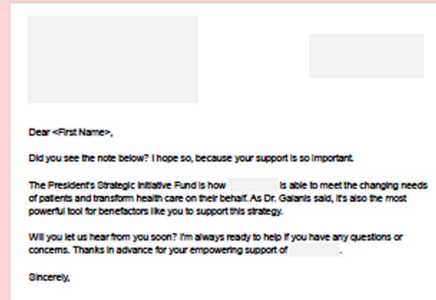
We appreciate your willingness to be contacted about [REDACTED], and how you can help advance medical research, education and patient care at the world leader in health care. Benefactors like you are essential members of the Mayo Clinic community, and we are very grateful for your trust and support. We will be in touch soon!

Department of Development

Donor Advised Fund: YES
I have a different topic I'd like to know more about: YES
First Name: Firstname
Last Name: Lastname
Email Address: Firstname@email.com
Phone Number: 123-456-7890
Contact Preference: Email

Key Considerations

Provide collateral to mid-level staff members



Your history of generosity to [redacted] is recognized and deeply appreciated. Today, I'm asking you to take us even further — meeting the changing needs of our patients and transforming health care on their behalf.

This is the time of year when we focus on the President's Strategic Initiative Fund, one of our most important ongoing fundraising priorities. Generous benefactor support allows [redacted] to adapt and innovate to meet current challenges and define the future. If you'd like to be part of this important effort, we would be grateful for your tax-deductible gift today.

We need your support of this important initiative. I hope we can count on you as we transform health care on behalf of patients.

You allow [redacted] to occupy a position of strength. The President's Strategic Initiative Fund is the most powerful tool for benefactors to [advance \[redacted\]'s bold strategy](#): to cure, connect and transform health care.



Cure.



Connect.



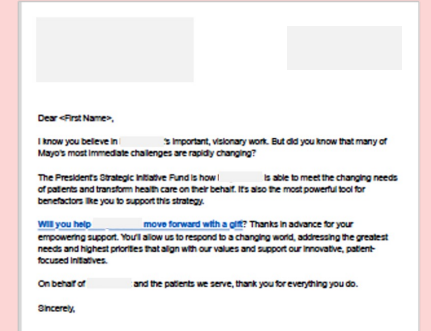
Transform.

Support Meaningful Change

Join Us Today

Thank you for your support of [redacted]. You empower us to respond to a changing world, addressing the greatest needs and highest priorities that align with our values and support our innovative, patient-focused initiatives.

With gratitude,



Events

Many orgs have appreciation events limited to donors of a certain size

- Intentionally invite a select group of donors one level down.
- Make it clear to them that they are being invited because they are in that specific group and you have a select number of tickets.
- If they don't level up, don't invite them back for the next year



Dedicate staff to mid-level donors

- Yes, ideally you would be able to dedicate an entire staff person to mid-level.
- But also yes, that is not feasible for many organizations.
- However, you may be able to dedicate part of someone's time.
 - This is an excellent opportunity to cultivate internal talent and gain. mentorship/supervisory experience
 - By assigning a small caseload of midlevel donors, those donors will get the “donor experience” that will make them long term donors.
 - Focus specifically on donors who have future major gift potential.



Recap



Mid-level giving is for everyone.



Donors need to know they are in a giving level.



Give mid-level donors a unique experience.



Questions?

Let's connect!

Bonterra: sales@bonterratech.com

TrueSense Marketing: info@truesense.com



