

**PPGC 2024**  
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**Five Ways to Build Relationships with your Mid-Level Donors**

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**Crescendo**  
Integrated Marketing for Planned Gifts

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**Tim Logan, ACFRE, FAHP, CFRE, FCEP**

- 40 Years of Fundraising and Nonprofit Management Experience
- Leader in developing innovative multichannel direct response programs targeted to major and planned giving donors
- AFP Master Trainer
- Masters of Nonprofit Management (MNO) from Case Western Reserve University
- One of only nine fundraisers to have both the FAHP and ACFRE credentials


Vice President, Mid-Level  
Synergy Direct Marketing  
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# Session Objectives

- The importance of developing a separate Mid-Level donor program
- Realizing the necessity of personal communications in Mid-Level fundraising
- 5 Ways to build relationships with your donors



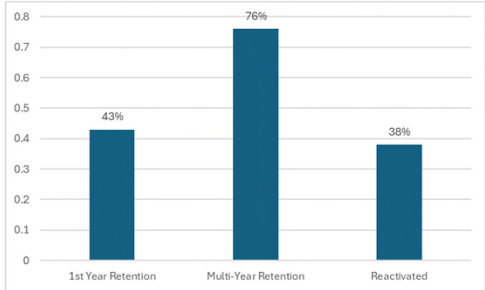
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# Mid-Level Programs Improve Fundraising Performance


### FEP 2023 3rd Quarter Donor Retention by Size

Donor Size	YOY Change	retained YTD
<b>MICRO</b> (Under \$100)	-4.3%	21.0%
<b>SMALL</b> (\$101 - \$500)	-3.6%	37.9%
<b>MIDSIZE</b> (\$500 - \$5K)	-3.7%	48.6%

### Self Reported Mid-Level Programs



Program Type	Retention Rate
1st Year Retention	43%
Multi-Year Retention	76%
Reactivated	38%



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## The Development Gap<sup>®</sup>

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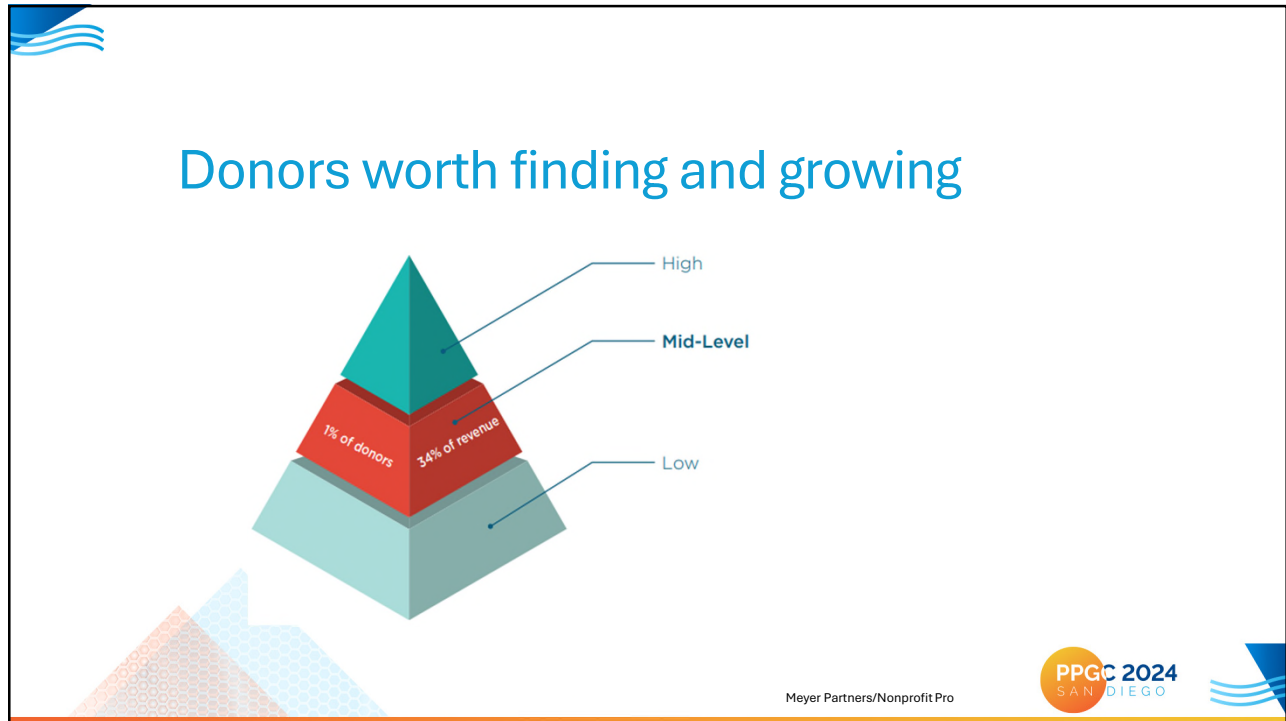


## Benefits of a mid-level donor program

- Increase dollars raised—return per donor
- Upgrade loyal donors
- ID potential major donors
- Personalize the donor relationship—increase affinity

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## Determine Mid-Level

Exercise

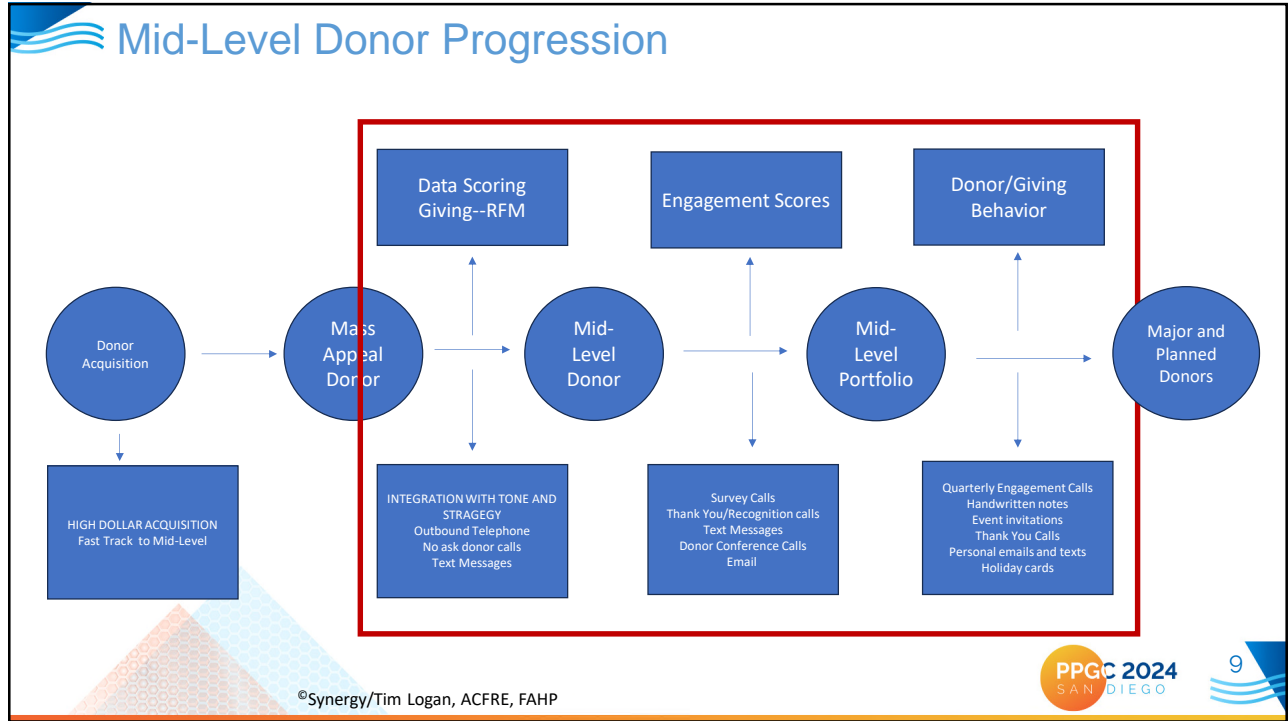
If a donor gives you \$5,000—what will you do with it?  
What *impact* will the donor's gift make?  
Tell the donor how their gift will make a difference.

Do the same for:

- \$1,000
- \$5,000
- \$10,000

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# The Concierge/Relationship Manager Process

- **Dedicated Relationship Manager**
- **Engages with a portfolio of potential and current mid-level donors**
- **Utilizing various communication methods**
  - *phone, email, text, voice broadcast, handwritten notecards*

1. Introduction Process
2. Quarterly Engagement
3. Ongoing "Thank You" Acknowledgements
4. Supplemental Communication

Ongoing thank you acknowledgement, birthday cards, anniversary cards.

Donor Conference Calls

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# Mid-Level Donor Response Cycle

- Contact
- Engage
- Learn
- Educate
- Involve
- Top of Mind

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## Mid-Level Rule of Thirds

- One-third do not want to communicate
- One-third are not “ready now”



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## Communicating with Mid-Level Donors


- Personalize communication in every channel
- Know your donors
- Use stories to create mission proximity
- Connect donors to your mission



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## Develop 2-Way Communication



**Donor Involvement Devices**

Return buck slips  
Telephone pledges  
Donor Conference Calls




**Use the phone**

Thank you  
Event invitations  
Introduction




**Annual Giving officer/Relationship Manager**

Personalized Texts  
Handwritten notes  
Event Invitations








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## Capture Data

- Conversations build relationships
- Get to know your donors--individually
- What is the donor interested in
- Does the donor have any concerns



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# Build Trust

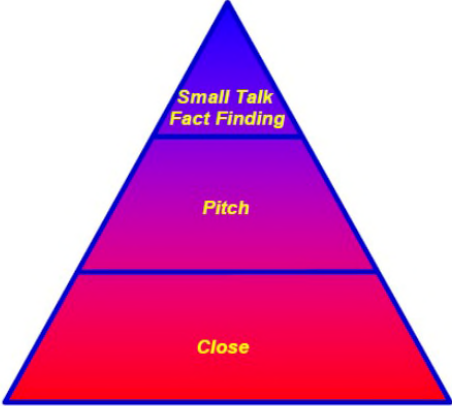
- Follow through on donor requests
- Be authentic
- The other AI—Appreciative Inquiry





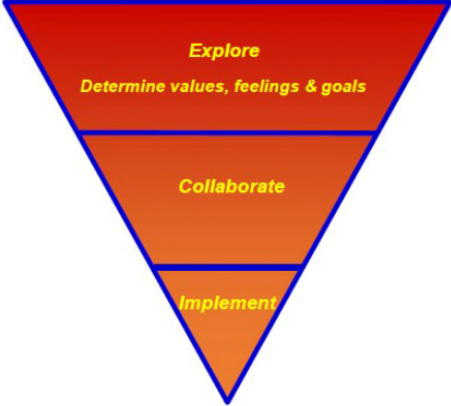
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## Traditional Method



## Appreciative Inquiry





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## Show Genuine Interest

- Involve the donor in your mission
- Respond to donor concerns
- Share donor accomplishments
- Remember, this is a one-way street


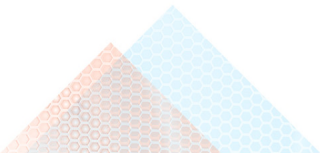


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## Give Them a Reason to Upgrade

- Special projects
- Mini-campaigns
- Show them how you will use their gift for impact
- They have the money—show them why they should give it to you
- Tell them about the lives you impact—not the building you are building






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## Reduce Donor Friction

- Planned Gifts
  - Stock Gifts--DTC
  - QCD
  - DAF
  - Legacy






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## Is this a Society

- Do you plan to name it
- Offer features/benefits/Merch
- Insider tours/lectures
- Vouchers
- Have everything ready before you launch



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## Designing Your Mid-Level Program

Who should you include in your Mid-Level Program?


- 1.
- 2.


What direct response strategies should you use for your Mid-Level Program?

- 1.
- 2.


Which donors should be moved to Major Donor Portfolios?

- 1.
- 2.








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## Mid-Level Program Donor Selection

- Capacity/Wealth
- Broad philanthropic giving
- **Predictive** Modeling along with additional research
- RFM
- Engagement Indicators
- Sustainers








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## Segmentation

- Handwritten notes
- Personal thank you calls
- Make sure these donors are always segmented in any direct mail/email appeal
- Let them know you know them






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## Moving donors out of Mid-Level

- To Major Giving
  - Gift Size
  - Gift Restriction
- To Planned Giving
  - Gift requires Gift Planning
  - Donor recognition






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## How do I Measure Success?

- This is not direct response!!
- Engagements
- Performance of like cohorts
- Revenue



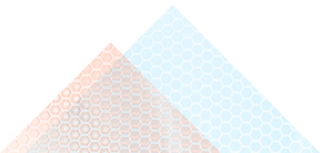


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## Five Ways to Build Relationships

1. Use a Relationship Manager/Donor Concierge Model.
  - a. Talk to your donors to build relationships.
2. Have a definitive Mid-Level Strategy.
  - a. Be transparent, vulnerable, honest, humble, and grateful in **every** channel.
3. Remember, this is a One-Way Street.
4. Use Appreciative Inquiry & Listen. Two ears, one mouth. Listen to hear, not to respond.
5. Mid-Level Relationship Management is a long-term strategy, just like Major Gifts, only way more people.



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