

BOARD & DONOR ADVANCEMENT

S O U T H E A S T C E N T R A L R E G I O N



WHO'S IN THE MIDDLE?

WHO ARE THEY?

We call them ***“MIDDLE DONORS”*** Here are a few insights about changes in giving by this under-tapped donor segment, namely, donors who:

- Don't meet your major gift level, but are giving substantially more than your median donor.
- Have given consistently over a period of years.
- Have demonstrated engagement outside of donating
- Possess the capacity to upgrade their giving.

STEP ONE: ANALYZE YOUR OWN DATA

While you're (hopefully) already measuring renewals & upgrades, there are more subtle behaviors to measure that can give you greater insight:

- ***Always measure both dollars and donors.*** Both are important, but if one is growing and the other isn't, that's a clue that your strategy need work/review.
- ***Look for consistency.*** Note not just who gives and how much but how often, especially over years. Do you have donors who are loyal and generous, but their individual gift amounts may not raise them specific tiers? Have you neglected to make solid stewardship moves and asks of your monthly recurring donors in favor of just ***“setting it and forgetting it?”***
- ***How else are they engaged?*** Donors interact with you more than just when they make a gift. Can you look at these middle segments to determine how else they've engaged with you? Did they come to an event? Have they opened your most recent newsletter? Have you even asked when you do speak with them?

- ***Determine donor potential.*** Have you done research on these donors to see if they have the capacity to make a larger gift? They may be in your “middle” category because no one has approached them with a “major” ask.
- ***Cross reference for age.*** Donor behavior changes with age. As you look at this critical donor segment, consider their life stage and how that might impact their ability and interest in engaging with your mission at a deeper level.

After you’ve done the research, you’ll know much more about this cohort of donors. Next, you need to turn these donor insights into relational fundraising strategy.

STEP TWO: CREATE A MID-LEVEL DONOR JOURNEY

Your challenge is probably the same as most other organizations’: how do you reach out to these donors in a way that is meaningful to the donor and manageable with limited staff resources? You use the same strategies as you would with major gifts, but with a lighter touch. Consider how you might answer these questions for your organization:

- ***Am I creating confidence in the donor that their gift is having an impact?***
 - What communications have they received? A thank you? An annual report? A newsletter? Look back at the past year of communications and assess if what you shared would make the donor feel like their gift made a difference.
 - How might you infuse what you’re already doing with more stories of transformation and meaningful reporting?
 - Can you invite the donor to see your mission in action and deepen their understanding of the work you do?
- ***Am I communicating often enough?***
 - There is not one right answer to this, but as you look at the number of messages and their pace, what insights can you glean?
 - Do you see a bump in giving right after a message goes out? Have you trained your donors to give only during certain “campaign” windows? Consider how you can tweak the timing of your communications to this engaged group of donors. You might consider starting with a quarterly impact email just for them.

- ***Did I say more than “thank you”?***
 - Too often, our stewardship messages are formulaic. That may be necessary to ensure that every donor gets some acknowledgement of their gifts.
 - Can you modify your stewardship plan for middle donors to be more forward thinking, thanking them for their past gift and encouraging them to get involved in your mission in a deeper way?
 - Can you create a portfolio for one of your staff to do personal follow-up with donors meeting specific criteria?
- ***What does their age tell me?***
 - While each donor is unique, their life stage can leave clues as to how to appeal to them most effectively. “Legacy” may mean more to a 70-year-old than a 40-year-old. “Families much like your own” may resonate more with parents of young children. “Building the future you want to live in” is more relevant to some ages than others. Use these insights to enhance your appeal language rather than lumping your middle donors in with your general appeals.

IN THE END, YOUR NEW DONOR JOURNEY MIGHT LOOK SOMETHING LIKE THIS:

A \$500 annual donor who has given for five years, attends one event annually, and opens most emails might receive a personal thank-you call, a targeted impact update, an invitation to a small-group briefing, and then a \$1,000 ask tied to a specific program outcome.

STEP THREE: TAKE ACTION

Strong fundraising efforts require ***intention, attention and adaptation***. When you consistently measure your trends, you gain the clarity needed to build on strengths and address gaps. Over time, trends tell a story. The organizations that pay attention to that story are the ones that adapt and grow. Here are some places to start:

- Pull a list of donors above your median gift but below your major gift threshold.
- Identify those with 3+ years of consecutive giving or engagement.
- Test one enhanced stewardship touch and one upgraded ask

If your team does not yet have an easy way to see these patterns, that is the first gap to close.