Mid-Level Donors: Bridging the Gap Between Annual and Major Gifts

October 29, 2019
AGENDA

- Mid-level Donor (MLD) Overview: Who Are They?
- Top 5 Program Necessities
- Group Discussion
- 30 Day Plan
- Q&A
“Too many nonprofits are rewarded for how little they spend — not for what they get done.”

– Dan Pallotta
MLD OVERVIEW: WHO ARE THEY?

Donors @ $1k - $10k = 1% of Donor Population = 1/3 of $ Given
MLD OVERVIEW: WHO ARE THEY?

Mission
Focused

Loyal

Retention
Ready

Upgrade
Potential
TOP 5 PROGRAM NECESSITIES

- Leadership Capacity
- Anti-silo Structure
- Meaningful Content
- Time to Evaluate
- Staff Bandwidth
SO

WHAT?
Now What?!!
CREATE YOUR 30 DAY PLAN

WEEK ONE
- Grade your organization on the 5 program necessities
- Get buy-in from key leaders

WEEK TWO
- Choose one program necessity for immediate change
- Commit to execution of the MLD program
- Design reporting structure

WEEK THREE
- Devise plan for second tier changes
- Look at costs and staffing
WEEK FOUR
▪ Devise a 6- to 12-month plan for costly changes

ONGOING
▪ Be patient
▪ Report out often
▪ Create metrics
# MID-LEVEL DONOR PROGRAM MATRIX

<table>
<thead>
<tr>
<th>Touch</th>
<th>Effort</th>
<th>Tier</th>
<th>% of Effort and Investment</th>
<th>Strategy</th>
<th>Cultivation and Solicitation Approach</th>
<th>Desired Outcomes</th>
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</thead>
<tbody>
<tr>
<td>High Touch</td>
<td>High</td>
<td>1</td>
<td>50%</td>
<td>Very Personal</td>
<td>Strategic Moves</td>
<td>Upgrade to Major Gift Donor</td>
</tr>
<tr>
<td>High</td>
<td>Medium</td>
<td>2</td>
<td>30%</td>
<td></td>
<td></td>
<td>Upgrade to Tier 1 Donor</td>
</tr>
<tr>
<td>Low</td>
<td></td>
<td>3</td>
<td>20%</td>
<td>Less Personal</td>
<td>Tactical Moves</td>
<td>Upgrade to Tier 2 Donor</td>
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</tbody>
</table>
CLOSING TIPS

- Spend (a little) money
- Spend (considerable) time
- Use (achievable) metrics
- Be (VERY) patient
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