

# Shaping Donor Journeys for Lasting Engagement

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**Whatever you do, we raise the funds to help you do it.**

- » Donor Acquisition
- » Donor Renewal
- » Lapsed Reengagement
- » Monthly Giving
- » Mid-Level Giving
- » Major Giving
- » Planned Giving

**Elevate  
Fundraising With  
Data + Heart**

**Elevate Mid-Level Fundraising  
With Data + Heart**

## 11 Tips for Mid-Level Success



**Want to connect with our team?**  
Contact us at 212-727-3876 or email  
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# 11 Tips for Mid-Level Success

## 1 The average mid-level donor gives at that level to six nonprofits.

Even as they spread the love, donors typically pick a preferred group that is most likely to receive their legacy gift, future major gifts, or sustained gifts through tough economic periods. A thoughtful program with insider access and recognition sets you up to stand out as their favorite.

## 2 Direct marketing is important – at all giving levels.

Testing shows that suppressing mid-level audiences from direct marketing decreases overall giving. Because most mid-level donors are acquired through direct marketing, they are accustomed to – and may even prefer – engaging through these channels. Therefore, it is better to create unique, specialized tracks for these donors.

## 3 Not all mid-level donors will become major donors.

Mid-level donors can have tremendous impact if you build strategies to upgrade donors within mid-level, rather than solely viewing the program as part of your major gift pipeline. Just imagine – if you upgrade 1,000 donors giving at \$1,000 to \$1,500 a year, that's another \$500,000 for your critical programs!

## 4 Should you brand your program? Absolutely **YES!**

Having a branded program increases awareness, engagement, and participation. These donors want to feel like they are part of a community – and a unique identity underscores that they are an active partner in your mission, together with like-minded peers.

## 5 Creating a personal, human touch unlocks giving.

If resources allow for dedicated donor ambassadors, spotlight it! Advertise contact details with a warm and inviting picture to underscore that donors have a friendly face they can reach with any questions. Research shows that donors who call their personal contact (not the other way around) are more likely to upgrade.

## 6 Premiums and giving levels work.

Levels can help upgrade donors, especially if paired with different, tangible benefits – balancing between premiums and unique opportunities for access and donor experiences. To continue driving a message of impact, align tokens of appreciation with your mission to remind donors about the community they are part of.

## 7 Mid-level monthly options can lift program impact.

Many donors can give more cumulatively if they split payments over the year – meaning monthly giving can increase your mid-level program size and revenue. As donors gain satisfaction from mid-level benefits, you gain peace of mind with the higher retention rates typical of monthly donors.

## 8 Promoting alternative ways to give creates opportunity.

Share ways to give beyond cash donations, like bequests, donor-advised fund (DAF) giving, IRA qualified charitable distributions, and beneficiary designations. Often financially savvy and secure, mid-level audiences are more likely to use these tools – and they are often the #1 source of planned gifts for nonprofits!

## 9 Transparency and impact reporting are critical to long-term loyalty.

Mid-level donors make an outsized investment in your work, so keeping them in the loop on progress is essential. Stewardship shows that you value them as partners in your mission, making the case for their continued commitment to your work.

## 10 A strategy to move donors **DOWN** the pipeline is valuable for re-engagement.

You should plan for absorbing donors into a strong mid-level program if they are not performing in a major gift portfolio. This offers a great opportunity to re-engage with donors who have a history indicating interest and known capacity to give.

## 11 It's never too early to start – even if your program is small.

Many mid-level programs have only one to two thousand donors – or less! Planting seeds early and establishing a structure of belonging can help entice donors and nurture relationships, knowing you can always add sophistication (if needed) when the program grows.