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An Allegiance Group + Pursuant Resource

Cultivating Stronger Communities:

Nurturing a Thriving
Mid-Level Giving Program
in Nonprofit Healthcare
Organizations

Prioritizing What's Important

Receiving a cancer diagnosis is scary. It can feel isolating and daunting, and a patient may not know who to turn to in desperate need of quality care. Many seek the support of a thriving medical research institute or hospital system – whose care is often supported by dedicated mid-level donors — **unsung heroes who bridge the gap between large-scale philanthropists and everyday individuals.**

While mid-level donors may not be able to match the substantial donations of major philanthropists, their **combined contributions can significantly impact** the programs and services essential to meeting patient needs.

When done right, mid-level donor programs drive meaningful revenue and create a pipeline for major gifts.

Mid-level donors need to receive the proper attention and care they deserve. Your nonprofit must strengthen relationships with mid-level donors to offer them an elevated experience with distinct opportunities to get more involved. This experience requires consideration and resource allocation to activate.

In this resource we describe the process many organizations follow to create the connective tissue of mid-level programs.



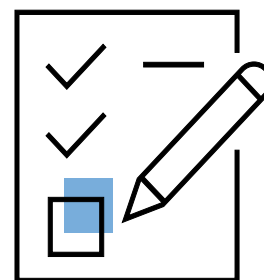
A More Holistic Approach

A thriving mid-level program is fueled not by singular transactions but by many interactions that lead to deep, lasting relationships.

These relationships can be forged through personal outreach from individuals, effectively segmented direct mail, personal yet automated emails, sincere voicemails, pertinent text message reminders, and more. Counterintuitively, organizations begin to minimize communication with donors as they move into mid and major levels of giving when the accumulation of individual touchpoints likely moved these donors to greater levels of support. For mid-level donors, this is often detrimental because without major gift officer contact the donor can feel more distant from your cause. For this reason, **organizations should welcome every opportunity to develop high-touch communication streams** that acknowledge a mid-level donor's increased commitment to the mission while not sacrificing their connections to the cause.

This approach often **takes the form of elevated, multichannel direct response touchpoints such as donor impact reports, personalized-at-scale proposals, match funding opportunities, and donor surveys.** All of which might require a dedicated role within your organization to engage with these donors. Your organization can identify segmentation opportunities in existing communication streams to speak to these high-value donors in a more personal way. As you develop an integrated and comprehensive high-touch program, you can ensure a balance of stewardship opportunities to illustrate impact and solicit feedback. Ultimately, your goal is to create a cohesive experience for your mid-level donors across all touchpoints.

Planning for Success: The Mid-Level Giving Checklist



While opportunities and mid-level programs may look different within different healthcare organizations, when considering the internal structure and tools needed to support a thriving and sustainable mid-level program, all programs have the same fundamental components, which are:

Internal Organization: *Capitalize on your people, systems, and processes.*

- ☐ Identify institutional goals
- ☐ Know your focus: Have conversations about major gifts and planned giving pipeline development; increase the total number of mid-level donors and upgrade giving; or increase the average gift.
- ☐ Understand your weaknesses and strengths and the capacity of your organization.
- ☐ Set goals that align with your organization's overall goals and mission

Data: *Realize that data tells you what the opportunity looks like.*

- ☐ Understand current opportunities afforded through your data
- ☐ Be aware of potential threats to your data and maintain good data hygiene

Strategy: *Learn how mid-level donors want to engage with you (phone, digital, in person, other) and what they're passionate about.*

- ☐ Develop a high-touchpoint communication plan.
- ☐ Understand what personal touchpoints are needed to engage with your mid-level donors successfully.

Stakeholder Buy-In: *Take the time to engage all the internal stakeholders – those who will play some role in the success or challenges of a mid-level program – to avoid confusion, delays, or frustration.*

- ☐ All stakeholders involved must understand your strategy.
- ☐ Stakeholders should be involved in your engagement strategy.

The Mid-Level Engagement Process

Effective mid-level engagement encompasses ongoing tracking and analysis of donor interactions, tailoring outreach efforts based on individual preferences and giving patterns, and collecting feedback.

Continuous refinement of this process is essential to ensuring the effectiveness of the various strategies pursued as well as enabling your organization to adapt to changing donor dynamics.



IDENTIFY

Identifying mid-level supporters is crucial for any organization aiming to cultivate their loyalty and commitment to the organization's cause.



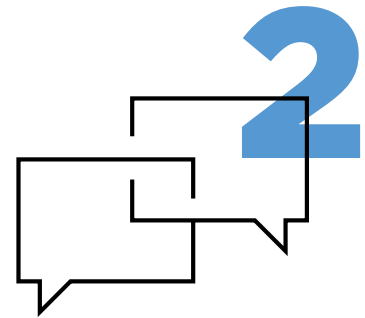
Mid-level donors typically fall within the \$500 to \$10,000 range – depending on your major donor program size. Mid-level donors occupy the zone between general donors and major contributors, mid-level donors make up roughly 1 percent of the donor file for most nonprofit organizations. However mid-level donors usually account for 30–35 percent of revenue.

The first step in **identifying potential mid-level donors involves assessing your existing donor base's overall giving behavior.** Examine their donation history: do they make consistent or sporadic contributions? What are the low, average, and high amounts of their past donations? Can you identify any recurring trends that suggest a heightened level of engagement and financial dedication from specific donors? Once you identify these patterns, you can tailor your outreach and engagement efforts toward these individuals.

To deepen engagement and move high-value donors up the giving pyramid, the ongoing identification and cultivation of mid-level donors is imperative. **Implementing active pipeline development and engagement strategies can boost revenue and expand mid-level, major gift, and planned giving programs.** Leveraging a combination of strategic services and technology can help establish an advanced donor pipeline strategy with multiple donor segments, applying appropriate treatment and business rules to guide ongoing donor interactions within priority audiences.

ENGAGE

Creating meaningful relationships and expressing gratitude ensures that mid-level donors remain dedicated supporters of the cause.



The initial step in forging strong bonds with potential mid-level donors is understanding their motivations for giving and customizing outreach efforts accordingly. For example, a hospital focused on pediatric care might identify a group of mid-level donors passionate about children's causes. Understanding this motivation, the organization can tailor its outreach efforts by providing personalized updates on specific children's causes or programs.

Furthermore, offering opportunities for volunteerism, site visits, behind-the-scenes tours, and more plays a vital role in establishing profound connections. **Meaningful interactions between the organization and the donor - rather than mere transactional interactions - reinforce the reasons for regular donations.**

Consider options like providing exclusive recognition for larger donations, such as discounts, special event access, or personalized gratitude from the organization's leadership. With each donation, you can also introduce custom gifts as tokens of appreciation, like branded merchandise. Rewarding consistent, long-term contributors through loyalty programs and granting them priority access to activities or content can incentivize repeat giving and acknowledge their dedication.

Note: It is essential to maintain transparency about how these rewards are used and their cost to the organization. **Donors should be informed about where their contributions are allocated and how they support critical mission-related activities.** These rewards should not replace opportunities for giving but enhance the overall donor experience.

LISTEN & INFORM

1. Survey and Mission Impact

Surveys are a tool for gauging mid-level donors' interests, motivations, and concerns. **Mid-level donors expect a deeper connection to the organization's mission. Surveys can help identify the unique programs or initiatives** that resonate most with them.

2. Pre-Lapse Contact

Maintain and nurture relationships with mid-level donors before they potentially lapse or reduce their contributions by personalizing communication, acknowledging past support, and expressing gratitude for ongoing commitment. This proactive engagement helps preempt any drop in loyalty and provides an opportunity to re-engage donors who may be wavering in their support. Organizations can solidify commitment and foster a stronger, more enduring connection by showing mid-level donors that their contributions are valued.

3. Seek Feedback

Actively soliciting input and insights from mid-level donors to gauge their satisfaction, preferences, and suggestions **can help improve the donor experience and strengthen the relationship** between the organization and its supporters.

Example: *A healthcare foundation conducts surveys and feedback sessions with its mid-level donors to understand their specific areas of interest within the foundation's mission. Based on this feedback, the foundation refines its communication and fundraising efforts to align more closely with the interests of its mid-level donors.*



TRACK & OPTIMIZE

1. Measure Success

Evaluate the effectiveness of fundraising campaigns and donor engagement strategies by setting clear, quantifiable goals and key performance indicators (KPIs) to assess the impact of fundraising efforts.

Measuring success goes beyond just financial metrics and can include donor retention rates, donor acquisition cost, and lifetime donor value.

Regularly reviewing and analyzing these metrics allows organizations to refine their strategies, make data-driven decisions, and use resources efficiently to achieve their goals.



Mid-Level				Upgraded from Mid to Major				Total Program			
Metrics	FYTD22	FYTD23	Y/Y	Metrics	FYTD22	FYTD23	Y/Y	Metrics	FYTD22	FYTD23	Y/Y
Donors	1,823	1,631	-10.9%	Donors	9	5	-40%	Donors	1,755	1,634	-11%
Gifts	6,586	6,567	-14.9%	Gifts	11	4	0%	Gifts	7,897	6,478	-14.7%
Revenue	\$2,332,655	\$2,590,944	8.7%	Revenue	\$31,250	\$41,900	-71.5%	Revenue	\$2,424,385	\$2,342,844	7.4%
Average Gift	\$214	\$501	27.6%	Average Gift	\$4,795	\$1,082	-71.5%	Average Gift	\$214	\$501	25.9%
Rev/Donor	\$1,406	\$1,789	12.0%	Rev/Donor	\$6,350	\$3,967	-52.5%	Rev/Donor	\$1,321	\$1,593	20.6%
Gifts/Donor	4.15	3.67	-2.3%	Gifts/Donor	2.2	3.67	66.7%	Gifts/Donor	4.14	3.96	-4.2%

2. Portfolio Optimization

Manage and maximize the effectiveness of your donor base by categorizing donors into segments based on factors such as giving capacity, engagement level, and interests. **By understanding the diverse makeup of your donor portfolio, organizations can tailor their outreach and engagement strategies to be more targeted and efficient.** This approach ensures that resources are allocated appropriately, with more attention and investment directed toward high-potential donors. Portfolio optimization also includes identifying underperforming segments and implementing strategies to improve their engagement, potentially increasing their value to the organization. It's a dynamic process that helps nonprofits adapt to changing donor dynamics and maintain a healthy and balanced portfolio.

3. Moves Management

Cultivate and guide relationships with donors, particularly major donors and high-level supporters, by **breaking down the donor engagement process into a series of deliberate “moves” or steps, each designed to move the donor closer to making a significant contribution.** These moves include actions like initial prospect research, personalized cultivation, solicitation, and stewardship activities. The process is highly tailored to individual donors, focusing on their unique interests, preferences, and giving capacity.

Success Story



When **Community Health Network Foundation** (CHNF) came to Allegiance Group + Pursuant, they were looking for efficient, effective ways to engage their current mid-level donors and upgrade high-capacity general donors. They recognized they needed a new approach to leveraging their brand and an effective fundraising message.

Through the power of Giving DNA – a platform that utilizes commercially available data to create profiles and a model of an organization’s database – customized segments were created tailored to CHNF’s current and potential mid-level donors. For example, through Giving DNA, CHNF developed three mid-level segments they continue to work actively on:

- » **Prospects** – Donors who, based on external data about capacity, spending patterns, philanthropic interests, and inclination, would likely increase their giving to a mid-level gift if given a slightly different experience.
- » **Stewardship** – Creating an opportunity for timely, elevated recognition of current and new mid-level donors who recently made a gift.
- » **Pre-lapsed** – Current or potential mid-level donors who have not yet lapsed but are at risk of doing so; CHNF staff now preemptively reaches out to thank donors for their previous support and shares the impact their gifts have made.



CHNF also uses opportunity segments — tailored segments that help them identify major gift prospects, planned giving candidates, donors likely to upgrade, likely crypto donors, and more — to inform direct mail campaigns and a better, more meaningful experience for their donors.

By harnessing the power of their data, CHNF’s mid-level retention and reactivation soared. Some of their successes included:

- » **15% of mid-level donors became reactivated** by engaging lapse-risk donors before they lapsed.
- » **71% of mid-level donors were retained** through stewardship focused on relationship building.

Conclusion

Cultivating a thriving mid-level giving program in a nonprofit healthcare organization is not merely a matter of securing financial support, it is about fostering a sense of community and solidarity in the face of ongoing healthcare challenges.

It is crucial to recognize the loyalty and value of mid-level donors and strengthen relationships with them by offering exciting and unique opportunities for involvement.

A holistic approach comprising high-touch communication streams and personalized engagement is the cornerstone for long-lasting relationships and financial support. Through careful identification, strategic engagement, active listening, and thoughtful optimization, healthcare organizations can retain mid-level donors and elevate their commitment and support.



More about **Allegiance Group + Pursuant**



+
GivingDNA.

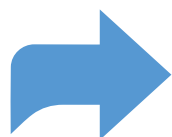
Allegiance Group + Pursuant stands at the forefront of innovation, empowering nonprofits with cutting-edge, tech-led marketing and fundraising solutions. With a legacy of decades in digital, web, UX, and advertising excellence, we have evolved into the ultimate one-stop-shop for nonprofits seeking a comprehensive, digital-first partner.

Our mission is bold: to inspire action and create a lasting impact.

Allegiance Group + Pursuant brings together experts in strategy, fundraising, development, creativity, and analysis. We are not just a service provider; we are your growth catalyst. From expanding your supporter base to enhancing brand experiences and leveraging custom fundraising software, we drive strategic and intelligent growth.

Choose Allegiance Group + Pursuant for Strategy & Consulting, Web Design & Development, Digital Marketing, Membership Acquisition & Retention, Donation Platforms, Loyalty Programs, and more. Our clients feed the hungry, heal the sick, nourish souls, enrich lives, care for animals, and build minds. You have an important goal, and we're thrilled to leverage our blend of data, technology, and award-winning creative to get you there.

We'd love to connect to learn more about your mission and the goals we can help you achieve. Contact Us!



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