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FLOURISH THROUGH PHILANTHROPY

**Middle Tier**  
**A.K.A. “The Missing Middle”**  
**Donor Relationship Development Programs**

# Warm Up

What aspect of middle tier donor relationship programs are you most curious about?

# Objective & Agenda

Learn ways to build and implement effective middle tier donor relationship programs that build on momentum from community campaigns & generate a robust pipeline for major and impact philanthropy.



- Overview
- Donor Relationship Strategies Aligned to Jewish Summer Camp
- Leadership Moment

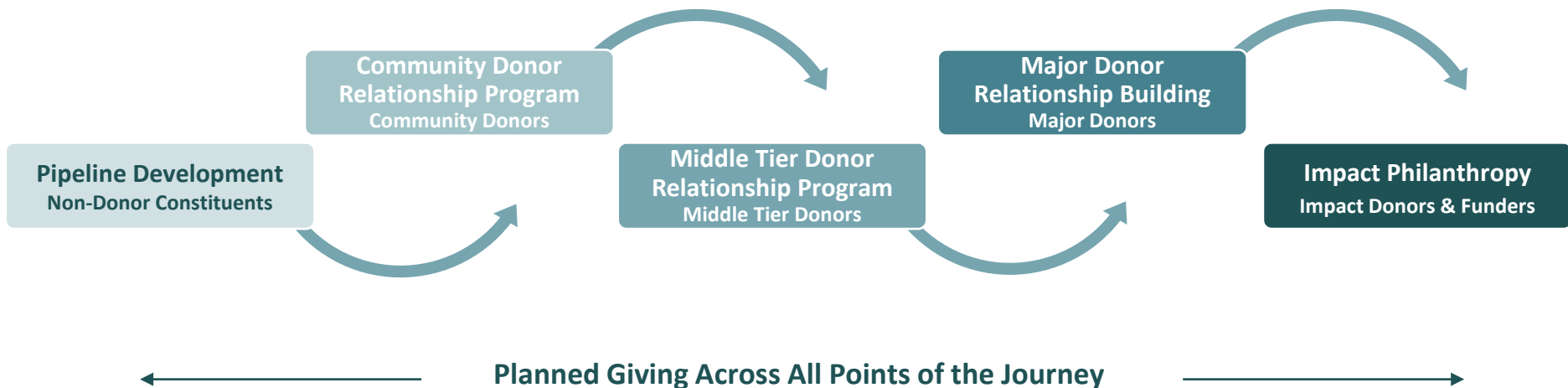


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# Overview

# The Dynamic Donor Journey

(Re)Frame your fundraising strategy and tactics to foster longevity & movement along the donor journey.



# Why Middle Tier Donor Programs Matter

Middle-tier donors, defined as those donors giving between \$1,000 and \$10,000 each year, while few in numbers, often generate as much as one-third of an organization's development income. Most organizations do, at best, marginal jobs of cultivating these donors. Jewish summer camps are uniquely positioned for success.

## General

- Bridge between annual donors and major gift donors
- Opportunity to retain loyalist donors leading to stable lifetime giving growth, incl. legacy gifts
- Deep knowledge about donor motivations and expectations
- Augment pipeline of engaged ambassadors and leaderships

## Jewish Summer Camps

- Expansive group of capital campaign donors; potential to be inspired by add'l ways of giving
- Exponential growth in number of donors over past several years
- Passion constituents with record of steady giving
- Highly engaged board and other ambassadors to promote

# Key Strategies

Middle tier donor relationship development programs are most successful when effective leaders champion, resource & leverage key strategies that lead to greater vitalization & sustainability.

Strategy	Considerations
<b>Use Metrics, Data &amp; Analytics</b>	Who are your middle tier donors?
<b>Discover Donor Motivations &amp; Expectations</b>	What do our donors care about, and what are their needs?
<b>Develop Brand, Content &amp; Stewardship</b>	How can we effectively engage these stakeholders?
<b>Apply Intentionality to Upgrades &amp; Inspire Longevity</b>	How might we inspire donor movement along the giving continuum, including legacy?

# Spotlight

Though middle tier donor relationship programs require a reprioritization time and attention, a little resourcefulness and ingenuity can go a long way.



Case Study





# Use Metrics, Data & Analytics

# Who are Your Middle Tier Donors?

You must know who your mid-tier donors are so you may figure out the potential and direction of your strategy.

**Who Are They?**



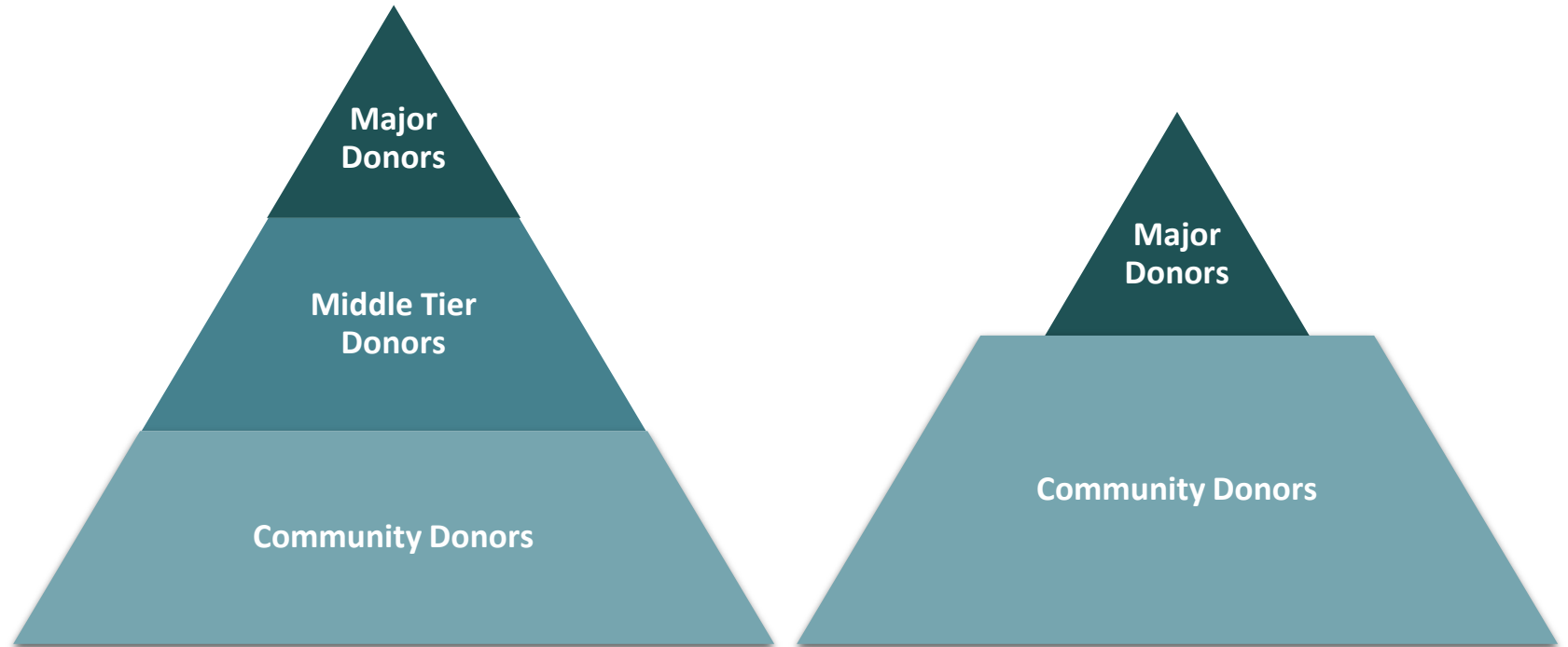
# Organize Your Donor Data by Giving Level

Gift Range	Number of Gifts	Total Dollars
> \$100,000	2	\$250,000
\$50,000 - \$99,999	1	\$50,000
\$25,000 - \$49,999	3	\$85,000
\$18,000 - \$24,999	9	\$170,000
\$10,000 - \$17,999	8	\$92,500
\$5000 - \$9999	16	\$96,000
\$1800 - \$4999	28	\$64,000
\$1000 - \$1799	17	\$18,000
\$500 - \$999	43	\$28,000
\$360 - \$499	36	\$16,000
\$180 - \$359	62	\$14,000
<\$180	98	\$6,000
<b>Total</b>	<b>323</b>	



# Depicting Your Donor Composition

Is your picture a pyramid, more of a sombrero, or other?



# Application & Exploration

Homework: Take a strategic look at your data.



Using donor data organized by giving levels, what shape best describes your organization's current program?

How will the shape inform your strategy?

# Delving Deeper

Fundraising reports will help you assess and improve growth & sustainability in donor activities along the giving continuum. In relation to the middle tier, there are five critical reports.

## Donor Retention

Focus on donors who have & have not renewed giving

Keeping donors has a higher yield that constant churn

## New Donors

Remain hyper- engaged in new donor acquisition

Consider welcome programs to foster enduring relationships

## Lifetime Value

Predict how much \$ you expect from donor over lifetime

Consider lifespan; frequency; average donation

## Revenue

Target growth by giving band; prioritize top 25

Assess by channel and/or appeal

## Lapsed Donors

Assess major donors who haven't given in five (5) years

Include institutional funders & past Board members



# Discover Donor Motivations & Expectations

# Listen Up

World Wildlife Fund found that their middle tier donors expect the following: Impact, Access, and Community. What do your middle tier donors care about, especially newly acquired donors who gave during the pandemic and/or donors who upgraded their gifts?

## Elevate Listening as a Key Strategy

**Listening campaigns may include one or more of the following:**

Donor Focus Groups | Town Halls | Phone Chats  
Surveys (Net Promoter Score, a loyalty metric) | Accessible Contacts on Communications and Web

<https://seachangestrategies.com/>





## **Develop Brand, Content & Stewardship**

# Foster Durable Connections

When you know what your middle tier donors care about, you are better able to select activities that engage them in meaningful ways.



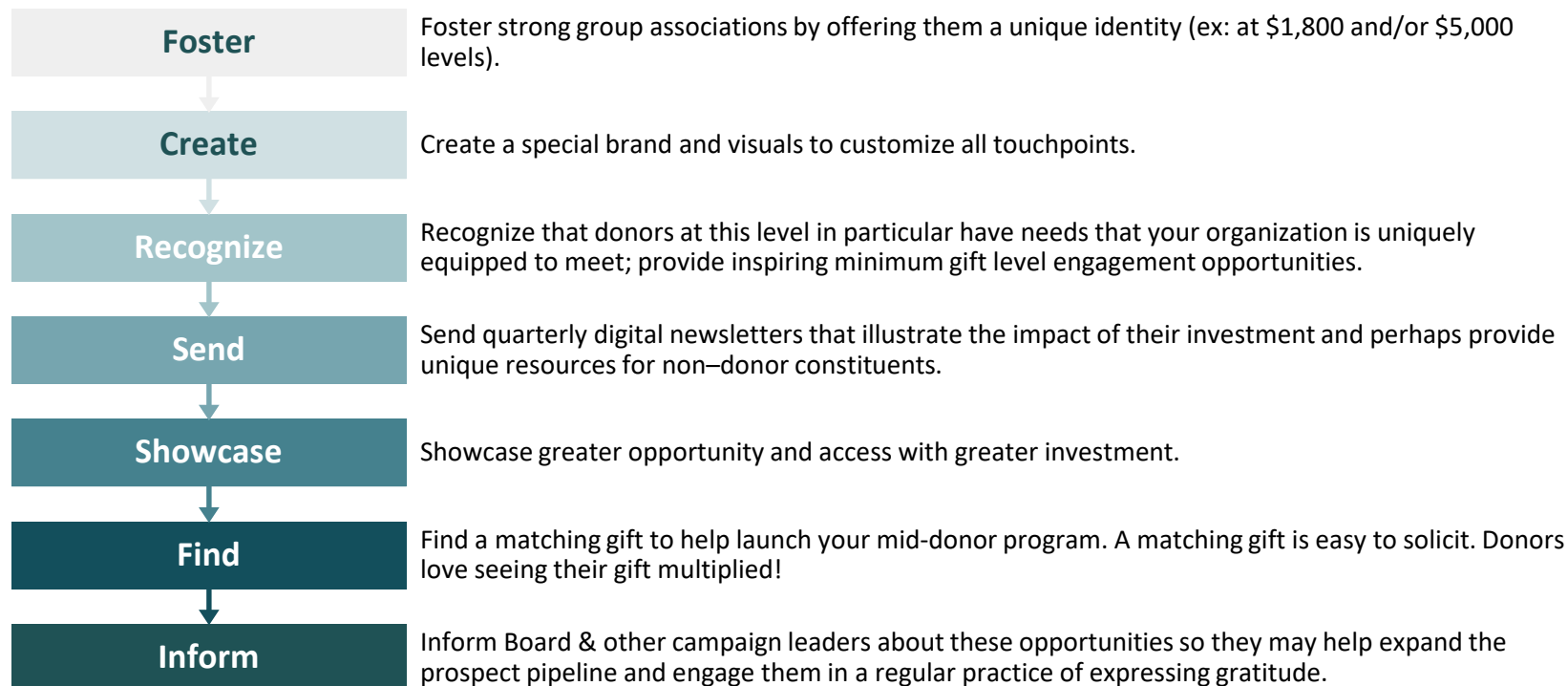
# Best Practices

Think about integrating customized inspirational & educational content, gratitude & recognition, and meaningful experiences or touch points into your program.

- Impact reports and/or regular updates
- Personalized thank you notes & unique expressions of gratitude
- Recognition societies led by “influencers”
  - Features stories
  - Micro-gatherings with interesting program
  - Virtual speaker series
- Volunteerism that advances priorities
- In-person summer visits

# Example: MiddleTier Donor Programs

When middle tier donors are neglected, donor retention & increase giving may weaken. There are strategic ways to reverse this, beginning with acknowledgement & prioritization of this vital group.



# Application & Exploration

Think about designing an **achievable** year-long program.



How might you repurpose and leverage existing content, programs and activities generated at your camp to strengthen your middle tier donor relationship development program?

*You may want to organize your plan in four quarters, or by months.*



# Leadership Moment

# What is the Leadership Moment?

This is the time to evaluate our current state and imagine our future state, and then choose a few next steps to strengthen our middle tier donor relationship development activities.

