

## 2026 Mid-Level Giving Survey

### Part A - Program Strategy

We're excited to continue our partnership with [Allegiance Group + Pursuant](#) (AGP). As a trusted vendor partner, AGP will oversee the collection of data, analysis, and the creation of comprehensive reports, complete with observations and insights for the Mid-Level Giving Benchmarking Summit.

The survey consists of four sections, with each section designed to take about 30 minutes to complete for total survey completion time of 2 hours. The *Performance Metrics* section may take longer if all the data is not readily available. It is highly recommended that you [submit a request to your data team](#) if you haven't already done so if this information is not readily available. The questions for performance metrics section is linked here for easy reference.

As a friendly reminder, you are able to start any section of the survey and finalize it at another time if you can't finish a section in one sitting. Submitting all sections is required to finalize your participation.

**This is part A that focuses on Program Strategy.**

Survey Sections:

[Part A: Program Strategy](#)

[Part B: Program Evolution](#)

[Part C: Performance Metrics](#)

[Part D: Creative Samples](#)

We appreciate your effort in providing accurate data for this initiative. For your convenience, [a PDF of all survey questions](#) is available to download. Reviewing and preparing your responses in advance is encouraged.

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#### 1. Organization Details

- a. **What is your organization name?**

*[Open-ended text box]*

- b. **What is your email address?**

*[Open-ended text box]*

- c. **Please share the email address of a secondary respondent, if applicable.**

*[Open-ended text box]*

## 2. Organization Information

This section gathers essential details about your organization.

### a. Which category best describes your organization?

*[Radio buttons for options]*

- Animal Welfare
- Arts & Culture
- Education
- Environment
- Health/Disease
- Human Services
- International Relief
- Religion
- Societal Benefit
- Other (please specify) *[Open-ended text box]*

### b. Select your organization's participation group from previous Benchmarking Meetings:

*[Radio buttons for options]*

- Group 1 Legacy
- Group 2 Contributing
- Group 3 Alliance
- I forgot or I am new - please fill in for me

### c. Is your organization based on membership?

*[Y/N]*

- Yes
- No

## 3. Program Structure & Staffing

This section covers the structure, staffing, and growth trends of your mid-level giving program. It looks at how your program operates - whether through direct marketing, a hybrid model, or major gift development

### a. How many years has your Mid-level program been in existence?

*[Radio buttons for options]*

- 1-3 years (New)
- 4 - 6 years (Recent)
- 7+ years (Mature)

**b. What is the state of your Mid-level program in terms of REVENUE growth?**

*[Radio buttons for options]*

- ☐ Growing (over 5% growth YOY)
- ☐ Steady (flat to 5% growth YOY)
- ☐ Stalled (declining YOY)

**c. What is the state of your Mid-level program in terms of DONOR growth?**

*[Radio buttons for options]*

- ☐ Growing (over 5% growth YOY)
- ☐ Steady (flat to 5% growth YOY)
- ☐ Stalled (declining YOY)

**d. What type of program best describes your approach?**

*[Radio buttons for options]*

- Senior Direct Marketing Program  
100% managed through Direct Marketing/Annual Giving Program, utilizing existing direct marketing initiatives and specialty packages/campaigns through multiple channels. Typically, under the guidance of a MLG Program Manager within the Direct Response/Annual Giving Team.
- Hybrid Program (Direct Marketing + Relationship Manager or Concierge)  
A blended program utilizing existing and specialty direct marketing campaigns in combination with a dedicated internal MLG Relationship Manager or an external vendor Concierge to conduct personal outreach and engagement. Program is under the guidance of a MLG Program Manager within either the Direct Response/Annual Giving Team or Philanthropy/Development team.
- Special Gifts/Major Gift Development Program  
An extension of the Philanthropy/Development team incorporating MLG as a 'special giving' audience within a Giving Officer portfolio or pipeline for Major Gifts. Any direct marketing campaigns and personal donor outreach managed within the Development/Philanthropy team.

**e. How has your Mid-level program staffing changed in the past 2 years? Select all that apply.**

*[Multi-select checkboxes]*

- We've added dedicated staff
- We've added Mid-level responsibilities to non-dedicated staff
- We've reduced the number of dedicated staff
- We've reduced Mid-level responsibilities to non-dedicated staff
- No change
- Other (please specify) *[Open-ended text box]*

- f. **Provide the number of full-time equivalent (FTE) staff dedicated to your Mid-level Program.**

*[Numeric field]*

#### **4. Mid-Level Definition & Strategy Section**

This section explores how your organization defines mid-level donors, sets giving thresholds, and structures program benefits. It also looks at upgrade and downgrade strategies, shared goals, and budgets to help benchmark your approach against peer organizations.

- a. **Does your organization have a branded name for its Mid-level program?**

*[Y/N]*

- Yes
- No *[Organizations without a named program will skip 4b]*

- b. **If you have a named program, what is the name?**

*[Open-ended text box]*

- c. **Does Your Mid-level program have tangible benefits?**

*[Radio buttons]*

- Yes
- No *[Organizations without tangible benefits will skip d]*

- d. **If your program offers tangible benefits, please upload a document describing them below:**

*[File upload option, max 10MB]*

- e. **What dollar ranges define mid-level giving in your organization?**

*[Multi-select checkboxes]*

- \$25,000+
- \$10,000 - \$24,999.99
- \$5,000 - \$9,999.99
- \$1,000 - \$4,999.99
- \$500 - \$999.99
- \$100 - \$499.99
- Not Applicable
- Other (please specify) *[Open-ended text box]*

- f. **How does your organization define Mid-level giving?**

*[Radio buttons for options]*

- Single Gift

- Cumulative Giving
- Combination
- Not Applicable

**g. How does your organization define a current Mid-level donor?**

*(Select the option that most closely matches your organization's definition.)*

*[Radio buttons for options]*

- A donor who has given within the last 12 months
- A donor who has given within the last 24 months
- A donor who has given within the last 36 months
- We do not have a standard definition for a current mid-level donor
- Other (please specify) *[Open-ended text box]*

**h. How does your organization define a lapsed Mid-level donor?**

*(Select the option that most closely matches your organization's definition.)*

*[Radio buttons for options]*

- A donor who has not given within the last 12 months
- A donor who has not given within the last 24 months
- A donor who has not given within the last 36 months
- We do not have a standard definition for a lapsed mid-level donor
- Other (please specify) *[Open-ended text box]*

**i. How does your organization define a deep lapsed Mid-level donor?**

*[Radio buttons for options]*

- A donor who has not given in the last 3 years
- A donor who has not given in the last 4-5 years
- A donor who has not given in over 6 years
- We do not have a standard definition for a deep lapsed mid-level donor
- Other (please specify) *[Open-ended text box]*

**j. Does your organization have a process for downgrading donors out of your Mid-level program?**

*[Y/N]*

- Yes
- No *[Organizations that do not downgrade donors will skip 4k]*

**k. If yes, under what conditions is a mid-level donor downgraded out of the program?**

*(Select all that apply or specify other criteria.)*

*[Radio buttons for options]*

- Donor has not given in the last 12 months
- Donor has not given in the last 24 months
- Donor's cumulative giving has fallen below the mid-level threshold

- Donor no longer meets the engagement criteria for mid-level donors
- Donor has opted out of mid-level donor communications
- Donor has been inactive across all channels for a specific period
- We do not have a formal process for downgrading donors
- Other (please specify) *[Open-ended text box]*

**l. Does your Mid-level program share goals with other departments, such as Major Gifts or Direct Marketing?**

*[Y/N]*

- Yes
- No *[Organizations that do not share goals will skip 4m and 4n]*

**m. If yes, which departments do you share goals with?**

*[Radio buttons for options]*

- Major Gifts
- Mass Market/ Annual Fund Program

**n. What are the shared goals?**

*(Select all that apply or specify other.)*

*[Radio buttons for options]*

- Total revenue raised
- Donor retention
- Number of donors upgrading to Mid-level
- Number of donors upgrading to Major Gifts
- Number of qualified major gift prospects identified
- Other (please specify) *[Open-ended text box]*

**o. Do you have a formal upgrade strategy to move donors into your Mid-level program?**

*[Y/N]*

- Yes
- No *[Organizations that do not upgrade will skip 4k and 4l]*

**p. Describe your upgrade strategy.**

*[Multi-select checkboxes]*

- Focused on recurring donor upgrades
- Based on donation amount thresholds
- Event-driven upgrades
- No upgrade strategy currently in place
- Other (please specify) *[Open-ended text box]*

**q. How do you measure the success of your upgrade strategy?**

*[Multi-select checkboxes]*

- Percentage of donors upgrading their giving level
- Increase in total donor contributions
- Lifetime value (LTV) of upgraded donors
- Number of donors retained at higher levels
- Number of donors upgrading to Major gifts
- Retention
- We don't currently measure the success of our upgrade strategy
- Other (please specify) *[Open-ended text box]*

r. **Does your mid-level program have giving levels?**

*[Y/N]*

- Yes
- No *[Organizations that do not have giving levels will skip 4s and 4t]*

s. **If your mid-level program has giving levels, are they used as part of your upgrade strategy?**

*[Y/N]*

- Yes
- No

t. **If your Mid-level program includes giving levels or tiers, what are they?**

*[Multi-select checkboxes]*

- \$500–\$1,000 annually
- \$1,000–\$5,000 annually
- \$5,000–\$10,000 annually
- Custom ranges based on donor capacity
- Our program doesn't include defined tiers
- Other (please specify) *[Open-ended text box]*

u. **Does your Mid-level program utilize an external Concierge program?**

*[Y/N]*

- Yes
- No *[Organizations without a Concierge program will skip v, w, and x]*

v. **Which vendor do you use for your external Concierge program?**

*[Open-ended text box]*

w. **How many donors are included in the Mid-level portfolio managed by the external Concierge program?**

*[Numeric value]*

x. **What expectations or success metrics does your external Concierge program use?**

**Select all that apply.**

- *[Multi-select checkboxes]*
- Response time to donor inquiries
- Donor satisfaction scores or feedback
- Retention rates of Concierge program donors
- Increase in donor lifetime value (LTV)
- Upgrade rates from Concierge program donors
- Personalized stewardship outcomes (e.g., specific goals met for donors)
- We don't currently use defined metrics
- Other (please specify) *[Open-ended text box]*

y. **Does your Mid-level program utilize an internal Relationship Manager?**

*[Y/N]*

- Yes
- No *[Organizations without internal relationship management will skip 4z and 4aa]*

z. **How many donors are included in the Mid-level portfolio managed by the internal Relationship Manager?**

*[Numeric value]*

aa. **What expectations or success metrics does your internal Relationship Manager use?**

**Select all that apply.**

*[Multi-select checkboxes]*

- Number of donor touchpoints per month/quarter
- Donor retention rates
- Upgrade rates among managed donors
- Total revenue generated from assigned donors
- Achievement of personalized stewardship plans
- Donor satisfaction and feedback scores
- Cross-program collaboration outcomes (e.g., referrals to other giving programs)
- We don't currently use defined metrics
- Other (please specify) *[Open-ended text box]*

Thank you for completing **Part A: Program Strategy**. Your contributions help us create a clearer picture of Mid-level giving trends.

Please continue to the next section using the links below:

[Part B: Program Evolution](#)

[Part C: Performance Metrics](#)

[Part D: Creative Samples](#)

## Part B - Program Evolution

The survey consists of four sections, with each section designed to take about 30 minutes to complete. To prevent losing progress, please complete and submit each section in a single sitting. Submitting all sections is required to finalize your participation.

**This is Part B, which focuses on Program Evolution.**

Survey Sections:

[Part A: Program Strategy](#)

[Part B: Program Evolution](#)

[Part C: Performance Metrics](#)

[Part D: Creative Samples](#)

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### 1. Organization Details

*This information will help us to attribute responses back to you and your organization and link responses in each Part back to one another.*

**a. What is your organization name?**

*[Open-ended text box]*

**b. What is your email address?**

*[Open-ended text box]*

**c. Please share the email address of a secondary respondent, if applicable.**

*[Open-ended text box]*

### 2. Recent Strategic Changes

This section asks about strategic adjustments your organization has made to its mid-level program in response to economic and external factors.

**a. What strategic changes have you made to your Mid-level program over the past year? Select all that apply.**

*[Multi-select checkboxes]*

- Implemented new donor segmentation strategies
- Adjusted giving levels or tiers

- Introduced new stewardship or engagement initiatives
- Enhanced donor communication strategies (e.g., personalized messaging)
- Added or updated technology or CRM tools
- Focused on acquiring new donors
- Improved donor retention efforts
- Increased focus on upgrading donors to higher tiers
- No significant changes made this year
- Other (please specify) *[Open-ended text box]*

**b. Were changes to the Mid-level program influenced by recent external factors such as government/policy changes, the economy, or other?**

*[Radio buttons for options]*

- Yes
- No *[Organizations that have not made changes will skip 2c]*
- Unsure *[Organizations that have not made changes will skip 2c]*

**c. What measurable results or learnings have you gained as a result of these changes?**

*[Multi-select checkboxes]*

- Increased donor retention rates
- Higher average gift size
- Growth in overall revenue
- Improved donor engagement metrics (e.g., event attendance, email open rates)
- More efficient donor segmentation
- Enhanced stewardship outcomes
- Identification of new donor trends or preferences
- We have not yet measured results or learnings
- Other (please specify) *[Open-ended text box]*

### **3. Mid-Level Donor Communication Tactics**

*This section reviews the channels and tactics your organization uses to connect with mid-level donors. It also looks at adjustments made in response to economic changes.*

**a. When a donor is formally upgraded into the Mid-level Program, are they removed from regular Direct Marketing Program communications?**

*[Y/N]*

- Yes
- No

**b. Which channels and tactics have you increased investment in? (Select all that apply)**

*[Multi-select checkboxes]*

- Email

- Paid Ads (Google, YouTube, etc.)
- CTV (connected TV)
- Other Digital (email, etc.)
- Phone
- SMS
- TV
- Mail
- Virtual Events
- Other (please specify) *[Open-ended text box]*

c. **Does your organization conduct Mid-Level donor events and if so, what type(s)?**

*[Multi-select checkboxes]*

- In-person
- Virtual
- Both
- None

d. **What measurable results or learnings have you identified from Mid-level events?**

**Select all that apply.**

*[Multi-select checkboxes]*

- Increased donor retention rates
- Higher average gift size
- Growth in overall revenue
- Improved donor engagement metrics (e.g., event attendance, email open rates)
- More efficient donor segmentation
- Enhanced stewardship outcomes
- Identification of new donor trends or preferences
- We have not yet measured results or learnings
- Other (please specify) *[Open-ended text box]*

**4. Diversity, Equity, and Inclusion (DEI)**

*This section focuses on how DEI principles are integrated into your mid-level program. It explores efforts to engage diverse audiences, assess messaging and accessibility, and measure the impact of inclusive practices.*

a. **Do you have a goal for your program to reach and engage with more diverse audiences?**

*[Radio buttons for options]*

- Yes
- No
- Other (please specify) *[Open-ended text box]*

**b. Identify the ways in which you are incorporating DEI into your Mid-level program.**

*[Multi-select checkboxes]*

- Selection of content
- Messaging
- Tone
- Choice of images
- Accessibility
- Choice of media
- Data selection
- We are not incorporating DEI
- Other (please specify) *[Open-ended text box]*

**c. How does your organization measure the success of its DEI efforts in your Mid-level Program? Select all that apply.**

*[Multi-select checkboxes]*

- Increased engagement from diverse donor groups
- Growth in donations from underrepresented communities
- Positive feedback on inclusiveness from donors
- Representation of diverse voices in campaign materials
- Improved accessibility of program content
- We do not currently measure DEI efforts
- Other (please specify) *[Open-ended text box]*

**5. Technology and Tools**

*This section looks at how your organization uses technology to support its mid-level program.*

**a. Has your organization explored and/or onboarded new technology or tools in the last year?**

*[Y/N]*

- Yes
- No *[Organizations that have not incorporated new technology will skip 5b]*

**b. What types of technology or tools have you adopted? Select all that apply.**

*[Multi-select checkboxes]*

- Donor relationship management software (CRM upgrades or new tools)
- Data analytics or reporting platforms
- Marketing automation tools (e.g., email platforms, segmentation tools)
- Online giving platforms or enhancements
- Event management software
- Personalized donor communication tools (e.g., video messaging platforms)

- AI or machine learning tools for donor insights
- Donor engagement platforms that connect with CRM
- Other (please specify) *[Open-ended text box]*

## 6. Challenges & Burning Questions

*This section asks about the biggest challenges facing your mid-level program and priorities for future planning.*

### a. What are the greatest challenges your Mid-level program is facing in the year ahead?

**Select all that apply.**

*[Multi-select checkboxes]*

- Donor acquisition
- Retaining existing Mid-level donors
- Upgrading donors to major gift levels
- Balancing personalization with scalability
- Limited staff or resources for stewardship
- Adapting to changing donor preferences or behaviors
- Other (please specify) *[Open-ended text box]*

### b. What topic is the highest priority for you to explore with your Mid-level giving peers?

*[Single choice]*

- Strategies for improving donor retention
- Best practices for upgrading donors
- Innovative stewardship techniques
- Effective use of technology in Mid-level giving
- Managing program costs and scalability
- Other (please specify) *[Open-ended text box]*

### c. What additional notes, comments, or questions would you like to share?

*[Open-ended text box]*

Thank you for completing **Part B: Program Evolution**. Your contributions help us create a clearer picture of Mid-level giving trends.

Please continue to the next section using the links below:

[Part A: Program Strategy](#)

[Part C: Performance Metrics](#)

[Part D: Creative Samples](#)

## Part C - Performance Metrics

The survey consists of four sections, with each section designed to take about 30 minutes to complete. To prevent losing progress, please complete and submit each section in a single sitting. Submitting all sections is required to finalize your participation.

**This is Part C, which focuses on Performance Metrics.**

Survey Sections:

[Part A: Program Strategy](#)

[Part B: Program Evolution](#)

[Part C: Performance Metrics](#)

[Part D: Creative Samples](#)

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### 1. Organization Details

*This information will help us to attribute responses back to you and your organization and link responses in each Part back to one another.*

**a. What is your organization name?**

*[Open-ended text box]*

**b. What is your email address?**

*[Open-ended text box]*

**c. Please share the email address of a secondary respondent, if applicable.**

*[Open-ended text box]*

### Revenue & Donor Numbers

*We are collecting performance data for calendar years 2024-2025, regardless of your organization's fiscal year. Standardizing responses around the calendar year ensures accurate benchmarking and meaningful comparisons with your peers. Please provide data aligned with this timeframe to the best of your ability.*

## 2. Organizational Donors & Revenue

*This section focuses on organizational donors and revenue. “Organizational” includes total contributions from all sources—individuals, foundations, and corporations—across all channels, such as online, events, and direct mail. It covers all purposes, including general, designated, and restricted funds, providing the broadest measure of giving*

- a. **How many active organizational donors (across all programs) did your organization have in calendar year 2025?**

*Total count of all donors from January 1, 2025 - December 31, 2025.*

*[Numeric input]*

- b. **What is the total organizational revenue in calendar year 2025?**

*Total revenue generated from January 1, 2025 - December 31, 2025.*

*[Numeric input]*

- c. **How many active organizational donors (across all programs) did your organization have in calendar year 2024?**

*Total count of all donors from January 1, 2024 - December 31, 2024.*

*[Currency input]*

- d. **What is the total organizational revenue in calendar year 2024?**

*Total revenue generated from January 1, 2024 - December 31, 2024.*

*[Numeric input]*

## 3. Direct Marketing Donors & Revenue

*This section focuses on direct marketing donors and revenue. “Direct Marketing” refers to a subset of organizational giving, capturing contributions and donors acquired through targeted channels such as direct mail, email, telemarketing, and digital advertising. This includes giving by general and Mid-level donors and any major or other donors giving in response to direct marketing efforts. Gifts by corporations/foundations, major gifts, and other revenue outside of direct marketing (such as events) should not be included.*

- a. **What is the total Direct Marketing revenue for your organization in calendar year 2025?**

*Total revenue generated from direct marketing efforts from January 1, 2025 - December 31, 2025.*

*[Numeric input]*

- b. **How many Direct Marketing donors did your organization have in calendar year 2025?**  
*Total number of donors who contributed through direct marketing from January 1, 2025 - December 31, 2025*  
*[Numeric input]*
- c. **What is the total Direct Marketing revenue for your organization in calendar year 2024?**  
*Total revenue generated from direct marketing efforts from January 1, 2024 - December 31, 2024.*  
*[Numeric input]*
- d. **How many Direct Marketing donors did your organization have in calendar year 2024?**  
*Total number of donors who contributed through direct marketing from January 1, 2024 - December 31, 2024*  
*[Numeric input]*

#### **4. 2025 Mid-level Giving**

*This section gathers key data on your mid-level donors and revenue in calendar year 2025, including donor counts, gift totals, and giving patterns.*

- a. **What was the TOTAL number of MID-LEVEL in calendar year 2025?**  
*Total count of unique individuals who donated at the Mid-level in calendar year 2025*  
*[Numeric input]*
- b. **What was the number of NEW, FIRST-YEAR MID-LEVEL DONORS in calendar year 2025?**  
*Count of donors who qualified as Mid-level for the first time in 2025 (include new donors incepting at Mid-level and current donors upgrading to Mid-level for the first time)*  
*[Numeric input]*
- c. **What was the TOTAL number of MID-LEVEL DONORS who were new in 2024 and renewed their giving in 2025?**  
*Count of Mid-level donors acquired in 2024 who gave at the Mid-level in both 2024 and 2025*  
*[Numeric input]*
- d. **What is the TOTAL number of MULTI-YEAR CONSECUTIVE MID-LEVEL DONORS in calendar year 2025?**  
*Total number of donors who gave in three consecutive years (2023, 2024, and 2025)?*

- e. **What was TOTAL REVENUE for the MID-LEVEL PROGRAM in calendar year 2025?**  
*Sum of all donations received at the Mid-level in calendar year 2025*  
*[Numeric input]*
- f. **What was the TOTAL number of MID-LEVEL DONORS in calendar year 2025?**  
*Count of all donation transactions received at the Mid-level during calendar year 2025*  
*[Numeric input]*

## **5. 2024 Mid-level Giving**

*This section gathers key data on your mid-level donors and revenue in calendar year 2024, including donor counts, gift totals, and giving patterns.*

- a. **What was the TOTAL number of MID-LEVEL DONORS in calendar year 2024?**  
*Total count of unique individuals who donated at the Mid-level in calendar year 2024*  
*[Numeric input]*
- b. **What was the number of NEW, FIRST-YEAR MID-LEVEL DONORS in calendar year 2024?**  
*Count of donors who qualified as Mid-level for the first time in 2024) include new donors incepting at Mid-level and current donors upgrading to Mid-level for the first time).*  
*[Numeric input]*
- c. **What was the number of MULLTI-YEAR MID-LEVEL DONORS in calendar year 2024?**  
*Count of donors who have given at the Mid-level in at least one previous year and also donated in calendar year 2024*  
*[Numeric input]*
- d. **What was TOTAL REVENUE for the MID-LEVEL PROGRAM in calendar year 2024?**  
*Sum of all donations received at the Mid-level in calendar year 2024*  
*[Numeric input]*
- e. **What was the TOTAL NUMBER of MID-LEVEL DONORS in calendar year 2024?**  
*Count of all donation transactions received at the Mid-level during calendar year 2024*  
*[Numeric input]*

## 6. Sustainers & Special Fund Revenue

*This section collects data on revenue from mid-level sustainers and special funding sources, including donor-advised funds and IRA contributions.*

- a. **Do you recognize or include sustainer donors in your Mid-level program?**  
[Y/N]
- Yes
  - No [Organizations without sustainer donors will skip 6c]
- b. **What was the total revenue from Mid-level sustainers for calendar year 2025?**  
[Currency input]
- c. **What was the total revenue from Donor-Advised Funds for calendar year 2025?**  
[Currency input]
- d. **What investments did your organization make in Donor-Advised Funds strategies for calendar year 2025?**  
[Multi-select checkboxes]
- Technology to identify likely DAF donors
  - Hire external firm or marketing partner
  - Include DAF specific language in Mid-level appeals
  - Created DAF specific revenue and/or donor goals for Mid-level
  - We have not made any investment
  - Other [Open text]
- e. **What was the total revenue from IRA contributions for calendar year 2025?**  
[Currency input]

Thank you for completing **Part C: Performance Metrics**. Your contributions help us create a clearer picture of Mid-level giving trends.

Please continue to the next section using the links below:

[Part A: Program Strategy](#)

[Part B: Program Evolution](#)

[Part D: Creative Samples](#)

## Part D - Creative Samples

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**This is Part D, which focuses on Creative Samples.**

Survey Sections:

[Part A: Program Strategy](#)

[Part B: Program Evolution](#)

[Part C: Performance Metrics](#)

[Part D: Creative Samples](#)

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### 1. Organization Details

*This information will help us to attribute responses back to you and your organization and link responses in each Part back to one another.*

**a. What is your organization name?**

*[Open-ended text box]*

**b. What is your email address?**

*[Open-ended text box]*

**c. Please share the email address of a secondary respondent, if applicable.**

*[Open-ended text box]*

### 2. Creative Example #1 - Mid-Level Program Welcome Package

*This section collects examples and details about your Mid-Level Program Welcome Package, including its design, tone, and features used to convey exclusivity and value.*

**a. Upload a single file that best represents your Mid-Level Program Welcome Package.**

*Only one file is allowed*

*[File upload option - max 10MB]*

**b. How would you describe the tone of the welcome message in your Mid-Level Program Welcome Package?**

- Warm and welcoming
- Professional and formal
- Friendly and casual
- Exclusive and high-end
- Other (please specify) *[Open-ended text box]*

**c. What specific design elements were used in the Mid-Level Program Welcome Package to reinforce exclusivity and the program's value?**

- Use of premium materials (e.g., high-quality paper, embossing)
- Sophisticated color scheme
- Personalized messaging or features
- Exclusive offers or benefits highlighted
- Other (please specify) *[Open-ended text box]*

**3. Creative Example #2 – Mid-Level Donor Appeal/Solicitation/Proposal Package**

*This section collects examples and details about your Mid-Level Donor Appeal, Solicitation, or Proposal Package, including key messaging themes, call-to-action strategies, and content used to inspire donor engagement.*

**a. Please upload a single file that best represents your Mid-Level Donor Appeal/Solicitation/Proposal Package.**

*Only one file is allowed.*

*[File upload option - max 10MB]*

**b. What key messaging themes were emphasized in your Mid-Level Donor Appeal/Solicitation/Proposal Package? Select all that apply.**

*[Multi-select checkboxes]*

- Project highlights
- Donor impact stories
- Urgency of need
- Organizational mission/vision
- Testimonials or success stories
- Matching gift opportunities
- Other (please specify) *[Open-ended text box]*

- c. **What call-to-action strategies were included in your Mid-Level Donor Appeal/Solicitation/Proposal Package? Select all that apply.**

*[Multi-select checkboxes]*

- Tiered Giving Amounts
- Emphasis on recurring giving
- Specific project funding requests
- Deadline-driven urgency
- Exclusive donor benefits or recognition
- Digital call-to-actions (e.g., QR codes, short URLs)
- Other (please specify) *[Open-ended text box]*

**4. Creative Example #3 - Personalized Stewardship Touch from Relationship Manager/Concierge**

*This section gathers examples and insights into personalized stewardship efforts from Relationship Managers or Concierge programs.*

- a. **Please upload a single file that best represents the Personalized Stewardship Touch.**

*Only one file is allowed*

*[File upload option - max 10MB]*

- b. **Which communication channels were most successful in delivering personalized stewardship to Mid-Level Donors? Select all that apply.**

*[Multi-select checkboxes]*

- Email
- Handwritten notes
- Personalized phone calls
- Custom video messages
- In-person visits
- Other (please specify) *[Open-ended text box]*

- c. **What goals were achieved through personalized stewardship efforts? Select all that apply.**

*[Multi-select checkboxes]*

- Improved donor retention
- Increased donor engagement
- Enhanced donor satisfaction
- Strengthened donor loyalty
- Secured additional donations
- Other (please specify) *[Open-ended text box]*

d. **How did your personalized stewardship efforts recognize or highlight the specific impact of Mid-Level Donors' contributions? Select all that apply.**

*[Multi-select checkboxes]*

- Direct acknowledgment of how a donor's gift supported a specific project or program.
- Mentioning donor names or contributions in reports, newsletters, or other communications.
- Sharing stories or testimonials that illustrate the tangible outcomes of their generosity.
- Providing custom updates or reports tied to the donor's giving interests.
- Including personalized thank-you messages or letters referencing specific impacts.
- Other (please specify) *[Open-ended text box]*

**Thank you for completing the Mid-Level Giving Benchmarking Survey!**

We deeply appreciate the time and effort you've dedicated to completing this survey. Your input plays a crucial role in shaping benchmarks and identifying the best practices that benefit the entire nonprofit community. You will receive a personal copy of your responses, and a summary of findings will be shared with participants to highlight trends and key takeaways. Thank you for your contribution to this important initiative!