Introduction to the DMFA Mid-Level Giving Benchmarking Survey

Thank you for participating in the MLG Benchmarking Survey.

There are four (4) parts to the survey. We recommend that you complete each individual part in one sitting. You will need to complete all four parts (A, B, C, D) for the benchmarking survey to be complete.

There are four due dates, one for each part. The complete survey, all four parts, are due no later than Friday, March 1 @ 5:00pm ET.

PART A – Program Overview: 30 minutes due no later than Friday, February 9, 2024
PART B – Strategy Overview: 30 minutes due no later than Friday, February 16, 2024
PART C – Creative Samples: 20 minutes due no later than Friday, February 23, 2024
PART D – Metrics and More: 25 minutes due no later than Friday, March 1, 2024

Each part of the survey is broken into sections with specific themes or topics. To help you prepare, please review the FAQ's on the main survey page. If you have any questions, please contact info@dmfa.org for assistance.

DMFA MLG Benchmarking Survey - Part A 2024 - Program Overview

PART A - Program Overview

Part A of the Benchmarking Survey is focused on specific attributes and definitions within your Mid-Level Program.

Estimated Completion Time: ~30 Minutes
Part A due no later than Friday, February 9, 2024

TIPS:
- **Ensure you enter your organization name below, to help us align responses across all four parts of the survey.**
- **Review the .pdf and prepare your answers prior to accessing the survey link.**
- **Only one person per organization should enter the information for each part.**

* 1. Please share who is completing this part of the survey, in case of questions.

First Name and Last Name	
Nonprofit Organization Name	
Email Address	
Phone Number	

* 2. Primary Type of Organization: Please select one from the following list of nonprofit industry sectors:

- ( ) Animal Welfare
- ( ) Arts & Culture
- ( ) Environment
- ( ) Health
- ( ) Human Services
- ( ) International Relief
- ( ) Religious
- ( ) None of the above

Section: MLG Program Staffing

* 3. How many internal FTE (40 hour) dedicated staff and non-dedicated staff are supporting your MLG Program? Please calculate the Full Time Equivalent (FTE) of internal staff that work on the program and enter that here.
Example: MLG Manager (100%), Relationship Manager (100%) Direct Response Coordinator (50%), Internal Data Analyst (25%) = 2.75

[   ]

* 4. Has your internal Mid-Level staffing changed in the past 2 years? (select all that apply)

☐ We've added dedicated staff

☐ We've engaged a mid-level partner to augment the mid-level team

☐ We've added mid-level responsibilities to non-dedicated staff

☐ We've reduced the number of dedicated staff

☐ We've reduced the mid-level responsibilities of non-dedicated staff

☐ No change

☐ Other (please specify)

[   ]

Section: MLG Program Basics

* 5. Membership: Is your organization based on membership?

○ Yes

○ No

* 6. Age of your MLG Program?

○ New (0-3 years)

○ Recent (4 - 6 years)

○ Mature (7+ years)

* 7. Does your organization have a named/branded MLG Program?

○ Yes

○ No

If yes, what is the name of your MLG Program?

[   ]

8. If your organization does not have a named/branded MLG program, why not?

[   ]

Section: Organization and MLG Program Definitions

* 9. Fiscal Year: What does your organization use to define your fiscal year?

○ January - December

○ April - March

○ July - June

○ October - September

○ Other (please specify)

[   ]

* 10. Current State of MLG Program Revenue, based on your most recent fiscal year? Select one:

○ Growing (over 5% revenue growth YOY)

○ Steady (flat to 5% revenue growth YOY)

○ Stalled (declining revenue YOY)

* 11. Current State of MLG Program Donor File based on your most recent fiscal year? Select one:

○ Growing (over 5% growth in MLG donor file YOY)

○ Steady (flat to 5% growth in MLG donor file YOY)

○ Stalled (declining donor MLG donor file YOY)

Section: Mid-Level Program Audience Definition

How do you define your Mid-Level Giving Program audience? To be counted as a Mid-Level Donor, how much do your donors give and in what time frame?

* 12. Giving Range: Please select all the donor ranges that apply to your program, from lowest to highest:

☐ $100 - $499.99

☐ $500 - $999.99

☐ $1000 - $2499.99

☐ $2500 - $4999.99

☐ $5000 - $7499.99

☐ $7500 - $9999.99

☐ $10,000 - $24,999.99

☐ $25,000+

13. If your MLG Program giving range exceeds $25,000, what is the top end of your mid-level giving range?

[   ]

* 14. To be counted as a Mid-Level Donor, please select the time-period used to calculate the total giving outlined in your answer above. Select the closest answer from the options below:

- [ ] 6 months giving
- [ ] 12 months giving
- [ ] 18 months giving
- [ ] 24 months giving
- [ ] 25+ months giving
- [ ] None of the above

* 15. For your time-period calculations above, which of the following do you use?

- ( ) Calendar Year
- ( ) Fiscal Year
- ( ) Rolling time frame (12 or 24 month)
- ( ) Other (please specify)

  [   ]

* 16. Please indicate if your MLG Giving Range uses single gifts or cumulative giving:

- ( ) Single Gifts
- ( ) Cumulative Giving
- ( ) None of the above

17. Please indicate if your MLG Giving Range includes sustaining or regular giving in your cumulative giving total?

- ( ) Yes
- ( ) No

Section: Program Type and Goals

Definitions for the following question:

- **Senior Direct Marketing Program** 100% managed through the 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.

* 18. Please identify the definition that best describes the MLG Program at your organization. Select one:

- ○ Senior Direct Marketing Program
- ○ Hybrid Program (Direct Marketing + Relationship Manager or Concierge)
- ○ Special Gifts/Major Gift Development Program

* 19. Annual Program Goals: Do you have independent MLG program goals? Shared goals with another department or team? Select one:

- ○ Yes, we share annual goals with the Direct Response/Annual Fund Program
- ○ Yes, we share annual goals with the Major Gift/Development Team
- ○ No, we have separate annual goals only for the MLG Program
- ○ Other (please specify)

[ ]

20. If you have shared goals with another team, please indicate the categories of shared goals (select all that apply):

- ☐ Gross Revenue
- ☐ Net Revenue
- ☐ Donor Retention
- ☐ Donor File Size
- ☐ Pipeline Move Goals: Mass to Mid-Level (example: # or % of donors moved up to ML)
- ☐ Pipeline Move Goals: Mid-Level to Major (example: # or % of donors moved up to Major)
- ☐ Other shared goals? (please specify)

[ ]

21. If you have shared goals with another team, how do you share the "credit" when reporting on performance?

[ ]

* 22. MLG Program Goals: Please indicate the categories of goals used to independently measure the success of your MLG Program (select all that apply):

- [ ] Gross Revenue
- [ ] Net Revenue
- [ ] Annual Donor Value
- [ ] Retention
- [ ] Donor File Size
- [ ] Pipeline Goals: Mass to Mid-Level
- [ ] Pipeline Goals: Mid-Level to Major
- [ ] Other goals used to measure the success of your MLG Program (please specify)

[   ]

* 23. How are budgeted revenue goals set for your mid-level program?

- ( ) Targets are set by senior management
- ( ) Targets are set by (or with substantial input from) dedicated mid-level staff
- ( ) Targets are set by (or with substantial input from) leadership in the direct marketing/annual giving program
- ( ) Targets are set by (or with substantial input from) leadership in the major gifts/development program
- ( ) Targets are set by (or with substantial input from) an external vendor partner
- ( ) Targets are set by a blended team collaborating together
- ( ) Other (please specify)

[   ]

Section: External Partners

* 24. Do you utilize an Agency of Record dedicated to your ML Program?

- ( ) Yes
- ( ) No
- ( ) If yes, please specify your partner:

[   ]

* 25. Do you partner with external vendors in support of your Mid-Level Giving Program?

- ( ) Yes
- ( ) No

26. If yes, please share who you partner with and for what services:

1. Vendor / Service

2. Vendor / Service

3. Vendor / Service

4. Vendor / Service

Section: MLG Program and Donor Journey

* 27. Does your organization conduct direct to file (new acquisition) of donors giving at the mid-level?

○ Yes

○ No

* 28. Describe how you plan your annual MLG Donor Journey across channels. Are your strategic touchpoints designed by the MLG audience team and delivered in coordination with the internal channel owners - direct mail, digital, telemarketing, text/SMS, etc?

○ Yes

○ No

29. If yes, please describe your collaboration process to design and execute your annual MLG donor journey:

30. If no, please describe how you manage the execution of the donor journey on behalf of your MLG program:

* 31. For touchpoints that are not owned by the MLG program (*example: direct mail appeals, advocacy emails, organization e-newsletters, etc.*) is the ML team offered the opportunity to review and approve the messaging for MLG donors before the touchpoint is deployed?

○ Yes

○ No

○ Other (please specify)

* 32. When a donor is formally moved into the MLG Program, are they removed from all direct response marketing communications?

○ Yes

○ No

○ Other (please specify)

[   ]

* 33. Which channels are you utilizing directly with your MLG program? (Even if the budget is from outside your MLG program.)

☐ Email

☐ Digital (Web)

☐ Digital (Social)

☐ Digital (Paid Ad/Retargeting)

☐ DRTV

☐ CTV

☐ Phone (Solicitation/Fundraising)

☐ Phone (Engagement/Stewardship)

☐ Text/SMS

☐ Direct Mail

☐ Virtual Events (Townhall style)

☐ In-Person Events

☐ Peer to Peer Events

☐ Other (please specify)

[   ]

For the following questions, assume that the Mid-Level Donor has opted to receive all types of communication from the organization. This is to provide a "fully loaded" example of a MLG Donor Journey, recognizing that each organization will account for communication and solicitation preferences. Each channel is broken out by solicitation (ask) touchpoints and stewardship/engagement touchpoints. *Exclude emergency/disaster response communications.*

* 34. Total EMAIL solicitations MLG donors typically receive from the organization in a year? (This is a roll up of total dedicated MLG solicitations + general organization campaigns, appeals, etc.)

[   ]

* 35. Total EMAIL stewardship touchpoints MLG donors typically receive from the organization in a year? (This is a roll up of total dedicated MLG touchpoints + organization non-solicitation touchpoints including advocacy, etc.)

[   ]

* 36. Total TEXT/SMS solicitation messages MLG donors typically receive from the organization in a year? (This is the total of all solicitation messages from all organization sources.)

[   ]

* 37. Total TEXT/SMS stewardship messages MLG donors typically receive from the organization in a year? (This is the total of all non-solicitation messages from all organization sources.)

[   ]

* 38. Total DIRECT MAIL Solicitation packages MLG donors typically receive from the organization in a year? (This is a roll up of total dedicated MLG DM solicitation (ask) touchpoints + organization solicitation touchpoints including general appeals, symbolic gift catalogs, etc.)

[   ]

* 39. Total DIRECT MAIL Stewardship packages MLG donors typically receive from the organization in a year? (This is a roll up of total dedicated MLG DM stewardship touchpoints + non-solicitation organization touchpoints including planned giving newsletters, annual tax statement, impact reports, etc.)

[   ]

* 40. Total EXTERNAL TELEMARKETING solicitation touches MLG Donors typically receive from the organization in a year? (This is a roll up of external solicitation executed by a third-party vendor.)

[   ]

* 41. Total EXTERNAL TELEMARKETING stewardship touches MLG Donors typically receive from the organization in a year? (This is a roll up of external stewardship and engagement executed by a third-party TM vendor or concierge.)

[   ]

* 42. Total INTERNAL PHONE solicitation touches MLG Donors typically receive from the organization in a year? (This is a roll up of internal solicitation executed by MLG staff, Relationship Managers or Gift Officers.)

[   ]

* 43. Total INTERNAL PHONE stewardship touches MLG Donors typically receive from the organization in a year? (This is a roll up of internal stewardship and engagement executed by MLG staff, Relationship Managers or Gift Officers.)

[   ]

Section: Expand on Responses

44. Use this field to share any expanded responses to questions in Part A. Include the question number and additional notes or comments.

[text field]

Suggested Topics for Discussion at the Summit?

45. Topics you want to discuss at the summit?
This is your opportunity to identify any topics or content you would like the facilitators to include as general session or breakout meeting discussion items during the summit:

[text field]

Thank you for completing Part A of the MLG Benchmarking Survey.

Please click Done to submit the survey.

When done, return to the main survey page to link to the remaining parts (B, C and D) of the survey. Link: https://dmfa.org/mlgbenchmarking/mid-level-giving-benchmarking-meeting-survey/