



## DMFA MLG Benchmarking Survey - Part D 2024 - Metrics and More

### PART D - Metrics and More

**Part D of the Benchmarking Survey is focused on the numbers and the metrics you use to define and assess your Mid-Level Program. Your responses to Part D provide a foundation for benchmarking analysis and discussion during the Benchmarking Summit. This is also the part of the survey where we ask for you to provide insights into other areas of impact - DEI and Technology. Thanks for taking the time to provide thoughtful responses to the open-ended questions.**

**Estimated Completion Time: ~25 Minutes**

**Part D due no later than Friday, March 1, 2024**

#### **TIPS:**

- **Many organizations leverage their internal analytics staff or an external analytics partner to assist with this part of the survey.**
- **Ensure you enter the 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.**
- **If you have any questions about how to complete the metrics in Part D of the survey, please reach out to [info@dmfa.org](mailto:info@dmfa.org) who will connect you with a MLG facilitator to assist you.**

\* 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. If you had assistance in compiling the numbers for Part D, and would like specific follow up questions to be directed to them, please share their contact information:

<b>First Name and Last Name</b>	<input type="text"/>
<b>Organization Name</b>	<input type="text"/>
<b>Email Address</b>	<input type="text"/>
<b>Phone Number</b>	<input type="text"/>

**Section: Fiscal Year**

\* 3. To respond to the questions in Part D consistently, we recommend using either the most recent fiscal year or the most recent calendar year. Please indicate which you used and describe below.

*Example: Used most recent Fiscal Year which runs October - September. Select: Most recent Fiscal Year and then enter in the text box: Fiscal = October 2022 - Sept 2023.*

- Most recent Fiscal Year
- Most recent Calendar Year

Please describe Fiscal Year:

**Section: Active Donors / Lapsed Donors**

Please provide total organization donor counts based on individual donors including mass market, mid-level and major gifts. In this definition, we consider any donor "active" if they have given a gift within 24 months.

\* 4. Total active individual donors (0-12 months)

\* 5. Total active individual donors (13-24 months)

\* 6. Total lapsed individual donors (25 - 48 months)

Please provide total mid-level program donor counts based on individual donors in the mid-level giving program only. In this definition, we consider any donor "active" if they have given within 24 months.

\* 7. Total active individual ML donors (0-12 months)

\* 8. Total active individual ML donors (13-24 months)

\* 9. Total lapsed individual ML donors (25-48 months)

10. Do you capture the year of entry or date the donor moves into the mid-level program?

- Yes  
 No  
 Other (please specify)

11. Do you add a flag or attribute to identify the mid-level audience in your CRM?

- Yes  
 No  
 Other (please specify)

**Section: Revenue, Gifts and Value**

\* 12. Total Annual Organization Revenue per the most recently completed IRS 990 Form.

\* 13. Fiscal Year Reported on 990

\* 14. Total organization revenue attributed to Donor Advised Funds (DAF) in the most recently completed fiscal year?

\* 15. If your organization tracks DAF revenue attributed only to mid-level, please indicate the amount. If no, enter 0

\* 16. Total organization revenue attributed to IRA / QCD Qualified Charitable Distributions in the most recently completed fiscal year.

\* 17. If your organization tracks IRA/QCD revenue attributed only to mid-level, please indicate the amount. If no, enter 0.

\* 18. Total Direct Marketing Revenue from the most recently completed fiscal year:

\* 19. Total Mid-Level Giving Revenue from the most recently completed fiscal year:

\* 20. Average Mid-Level Donor Value from the most recently completed fiscal year:  
(*Total MLG Revenue / Total # Active MLG Donors (0-12 mth) = Avg ML Donor Value*)

\* 21. Total number of Mid-level Donor Gifts given in the most recently completed fiscal year:

\* 22. Do you include recurring gifts in your calculation of the Total Number of ML gifts?

Yes

No

\* 23. Average Mid-Level Donor Gift Value in the most recently completed fiscal year:  
(*Total MLG Revenue / Total # of MLG Gifts = Average ML Gift Value*)

\* 24. Do you track mid-level revenue by channel?

Yes

No

\* 25. If yes, how much MLG revenue was attributed to Digital Channels in the most recently completed fiscal year?

If no, please enter 0.

**Section: Sustainers in MLG Program**

\* 26. Do you recognize sustainers or recurring gifts in your Mid-Level Giving Program?

Yes

No

\* 27. If yes, what is the Total Number of Mid-Level Donors in your program actively giving sustaining gifts? (0-12 months)

If no, enter 0.

\* 28. If yes, how much Mid-Level Giving revenue is from recurring giving in the most recently completed fiscal year?

If no, enter 0.

**Section: MLG Retention**

**The following questions are focused on your current Mid-Level program audience segment. To help with your responses, the following definitions are provided:**

- **1st Year Retention:** a donor who gave to your organization for the first time two fiscal years ago and gave a subsequent gift last fiscal year.
- **Multi-Year Retention:** a donor who was not new to the organization two fiscal years ago and gave a subsequent gift last fiscal year.
- **Reactivation:** a donor who was not new to the organization two fiscal years ago, who gave a gift one or more fiscal years prior, had a lapse in giving, then gave a gift last fiscal year.

**Note: Prior giving does not have to be just mid-level, look at all giving for Mid-Level segment to populate these metrics.**

\* 29. 1st Year Retention:

If unable to provide this metric for your ML audience, enter 0.

\* 30. Multi-Year Retention:

If unable to provide this metric for your ML audience, enter 0.

\* 31. Reactivation:

If unable to provide this metric for your ML audience, enter 0.

\* 32. If your organization does not provide retention reporting on only the ML Program audience, do you have access to overall donor retention rates for your organization?

- Yes  
 No

If yes, please enter the three metrics based on the full donor file, below.

33. If applicable, do you include Disaster Response Donors in your MLG program retention calculations?

- Yes
- No

34. Are there any other retention questions you want to discuss at the ML Summit?

**Section: New Technology and Tools**

Given the rapidly advancing use of Artificial Intelligence, this section will focus on AI in the 2024 survey.

\* 35. How familiar are you with artificial intelligence (AI) and its applications in the non-profit sector?

- Extremely familiar
- Very familiar
- Somewhat familiar
- Not so familiar
- Not at all familiar

\* 36. Are you personally utilizing any AI technologies as a resource or to improve productivity?

- Yes
- No

If yes, what AI technologies are you using?

\* 37. Does your organization currently use any AI technologies?

- Yes
- No
- Don't Know

If yes, please specify:

\* 38. Are generative AI tools like ChatGPT, etc. being used for generating communication text and/or images?

- Yes
- No
- Don't Know

\* 39. Are AI tools being used by your vendor partners?

- Yes
- No
- Don't Know

\* 40. What are your primary concerns or challenges regarding the implementation of AI in your organization?

41. Do you have other questions about AI and its application to your MLG program or organization fundraising for possible discussion at the summit?

**Section: DEI Overview**

This section is seeking to understand how your organization and ML program is addressing diversity, equity and inclusion.

\* 42. Does your organization have a clear definition for what DEI means?

- Yes
- No

\* 43. Where is your organization currently at in its DEI Journey?

- Awareness
- Assessment
- Implementation
- Formal Policies
- Measurement
- None of the Above

\* 44. Are you / your organization working with outside consultants around your DEI efforts?

- Yes
- No

If yes, please provide consultant name / services:

45. How, if at all, has your organization changed its mission messaging based on DEI principles?

\* 46. Does your organization have a goal for your ML program to reach and engage with more diverse audiences?

- Yes
- No
- Other (please specify)

\* 47. Identify the ways in which you are incorporating DEI into your mid-level program. Select all that apply:

- Accessibility
- Choice of images
- Choice of media
- Data appends
- Data selects
- Messaging
- Selection of content
- Tone
- None: this is not a priority for our program
- Other (please specify)

48. Please share any additional thoughts or comments on DEI to help guide possible discussions at the Benchmarking Summit:

**Section: Expand on Responses**

49. Use this field to share any expanded responses from Part D. Include the question number and any additional notes or comments.

**Final Questions?**



50. This is your opportunity to submit any final questions you would like the facilitators to consider for discussion during the mid-level giving benchmarking summit:

**Thank you for completing PART D of the survey for the Mid-Level Giving Benchmarking Summit.**

**Press DONE to submit your survey.**

**This is the final part of the benchmarking survey. All four parts are due no later than Friday, March 1 @ 5:00pm ET.**