



## DMFA MLG Benchmarking Survey - Part B 2024 - Strategy Overview

### Reminders - DMFA Mid-Level Giving Benchmarking Survey

**There are four (4) parts to the survey. We recommend 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 & 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](mailto:info@dmfa.org) for assistance.**



## DMFA MLG Benchmarking Survey - Part B 2024 - Strategy Overview

### PART B - Strategy Overview

**Part B of the Benchmarking Survey is focused on program design, strategies and business rules you use with your Mid-Level Program including mass to mid-level upgrades and the pipeline to major gifts. This is also the part of the survey where you submit your greatest challenge and burning question (an annual highlight!) Your responses to Part B drive a significant amount of the program discussion during the Benchmarking Summit. Thanks for taking the time to provide thoughtful responses to the open-ended questions.**

**Estimated Completion Time: ~30 Minutes**

**Part B due no later than Friday, February 9, 2024**

**TIPS:**

- **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.**

\* 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**

**Section: MLG Strategy Overview**

\* 2. Recent Strategic Changes: Over the past year, what strategic changes have you made to your MLG program?

\* 3. What measurable results or learnings have you gained as a result of these changes?

\* 4. Within the past 3 years, has your ML program gone through a strategic reorganization? *(Examples: previous ML program was discontinued and now restarted, prior ML program shifted management to another internal team, ML program gained or lost funding for external vendor partner support, etc.)*

Yes

No

If yes, please specify.

**Section: Conversion/Upgrade to Mid-Level Strategy**

The following questions are asking about your strategies to convert donors from general mass market donors up to mid-level. Please answer these questions with that aspect of your program in mind.

*Note: there will be a section that is focused on the pipeline and moves from mid-level to major gifts later in the survey.*

\* 5. What tools do you use to identify and qualify prospects for Mid-Level? Select all that apply:

- Individual prospect research
- Giving capacity data appends
- Wealth Screening
- Data modeling
- Engagement attributes flagged on your CRM (examples: advocate, volunteer, patient, mission connection, Captain for event, etc.)
- Other (please specify)

6. If you indicated data modeling, what are some of the key variables used in the model?

\* 7. Does your organization have formal business rules that define the expectations for the conversion/upgrade of mass market donors to mid-level and the process for how that is tracked within your CRM?

- Yes
- No

\* 8. Do you have a formal strategy to convert and upgrade donors into your Mid-Level giving program?

- Yes
- No

9. Describe your mass to mid-level conversion/upgrade strategy, if you have one. (Example: we target high value mass market donors with a multi-channel invitation campaign 2x a year with a matching gift offer.)

10. If applicable, how do you measure the success of your mass market to mid-level conversion/upgrade strategy?

**Section: Mid-Level Program Giving Tiers**

\* 11. Does your mid-level program have identified giving levels or tiers within the overall program?

- Yes
- No

If yes, please describe:

12. If yes, do you have associated benefits aligned with each giving tier? *(Example: Invitations to a special event with the charity founder, based on amount of giving)*

- Yes
- No

13. If your ML program has giving tiers, are they used as part of your conversion/upgrade strategy?

- Yes
- No

**Section: Downgrade from Mid-Level to Mass Market**

\* 14. Does your organization have formal business rules that downgrade donors and move them out of your ML program into the general/mass market audience including how that is tracked in your CRM?

- Yes
- No

15. Describe your business rules for downgrades out of the mid-level program and tracking. *(Example: If donor does not give cume between \$1k-\$9999 in 24 months, the donor is moved out of ML to Mass Market at the next review. Reviews and downgrades take place once per quarter. All downgraded donors have a new flag added to their record that includes date of downgrade for reporting/tracking.)*

**Section: Pipeline/Moves from Mid-Level Giving to Major Gifts**

The following questions are asking about your strategies to move mid-level donors through the pipeline and up into major gifts. Please answer these questions with that aspect of your mid-level program in mind.  
*Note: there is a previous section of the survey focused on converting and upgrading mass market to mid-level giving. This section is focused on moves up to major gifts.*

\* 16. Prospect Research: Do you have a person helping to identify and qualify mid-level prospects in your organization? Do they have other areas of responsibility? Check all that apply:

- No prospect research support for the ML Program
- Dedicated staff member for ML Prospect Research
- Shared staff member for Mid-Level and Major/Legacy Program Prospect Research
- Other (please specify)

\* 17. Does your ML program actively work to collect first party data (information provided by the donor to you) through surveys or by capturing and flagging data points shared with the organization through donor touchpoints?

- Yes
- No

If yes, what types of data do you work to capture directly from your ML donors?

\* 18. What tools do you use to identify and qualify prospects for the pipeline to Major Gifts? Select all that apply:

- Capacity data appends
- Wealth screening
- Data modeling
- Engagement attributes flagged on your CRM (example: advocate, volunteer, patient, mission connection, attended virtual townhall, Captain for in-person event, etc.)
- Other (please specify)

\* 19. Does your organization have formal business rules that define expectations for the upgrade/moves of mid-level donors to major gifts, and how those moves are tracked in the CRM?

- Yes
- No

\* 20. Do you have a formal strategy to upgrade/move donors through the pipeline from your Mid-Level giving program to Major Gifts?

- Yes
- No

21. Describe your mid-level donor upgrade strategy, if you have one. If no strategy, why not?

22. If applicable, how do you measure the success of your pipeline moves to major gift strategy?

**Section: Major Gift Giving Tiers**

\* 23. Does your Major Gift program have identified giving levels or tiers?

- Yes
- No

24. If yes, do you have associated benefits aligned with each giving tier?

- Yes
- No

25. If your major gift program has giving tiers, are they used as part of your pipeline moves and upgrade strategy?

- Yes
- No

**Section: Downgrade from Major Gifts to Mid-Level**

\* 26. Does your organization have formal business rules and process that downgrade donors and moves them out of Major Gifts into the Mid-Level Program including how that is tracked in your CRM?

- Yes
- No

27. Describe your business rules for downgrades out of the major gift program and tracking. *(Example: if donor does not agree to meet with MG Officer within 12 months - OR - Donor doesn't give cume over \$25k in 24 months, the donor is moved out of Major Gifts to Mid-Level at the next review on a rolling monthly basis. All downgrades have a flag that includes dates for reporting)*

**Section: Mid-Level Retention Strategies**

\* 28. Do you have a Mid-Level Giving retention strategy?

- Yes
- No

If yes, please describe your retention strategy:

\* 29. Do you run targeted campaigns focused on pre-lapsed or lapsed mid-level donors?

- Yes
- No

If yes, please describe:

\* 30. If your organization responds to disasters/emergencies, do you have a planned emergency donor mid-level retention journey?

- Yes
- No

If yes, please describe:

**Section: High Touch - Internal Relationship Manager**

\* 31. Does your MLG Program utilize an internal Relationship Manager?

*If NO, please indicate "No" and skip to the next section.*

- Yes
- No

32. How many ML Relationship Managers work on your MLG program?

33. What is the portfolio size (# of donors) that are managed by each ML RM?

34. Does your ML RM have a standard portfolio onboarding series of touchpoints?

- Yes
- No

35. If yes, how many touchpoints over what period of time?

36. How many personal touches are each ML RM expected to make annually, per donor in their portfolio?

37. Please describe how direct marketing touchpoints are utilized by ML RM's?

38. Do your ML RM's collaborate with Major Gift Officers on in-person visits/meetings?

Yes

No

39. Do you have a formal process for offboarding/transitioning a donor from a ML RM to a Major Gift Officer?

Yes

No

40. What are the expectations or success metrics used for the ML Relationship Manager?

**Section: High Touch - External Concierge**

\* 41. Does your MLG Program utilize an external Concierge-style program?

*If NO, please indicate "No" and skip to the next section.*

Yes

No

42. How many Concierges do you have working on your ML program?

43. What is the portfolio size (# of donors) that are managed by each Concierge?

44. Does your Concierge program have a standard portfolio onboarding series of touchpoints?

Yes

No



45. If yes, how many touchpoints over what period of time?

46. How many personal touches are each Concierge expected to make annually, per donor in their portfolio?

47. Do your external Concierge collaborate with internal Major Gift Officers on in-person visits/meetings?

Yes

No

48. Do you have a formal process for offboarding/transitioning a donor from a Concierge to a Major Gift Officer?

Yes

No

49. What are the expectations or success metrics used for the Concierge program?

**Section: Greatest Challenge**

50. In the year ahead, what is the greatest challenge that your MLG program is facing?

**Section: Burning Question**

51. If you could ask your mid-level peers one burning question, what would it be?

**Section: Expand on Responses**

52. This is a place to share any expanded responses to questions in Part B. Include the question number and any additional notes or comments.

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

**Press DONE to submit your survey.**

**When complete, please return to the main survey page where you can access the remaining two parts of the survey, find .pdfs to prepare your answers and the links to Part C and D. The complete survey, all four parts, are due no later than Friday, March 1 @ 5:00pm ET.**