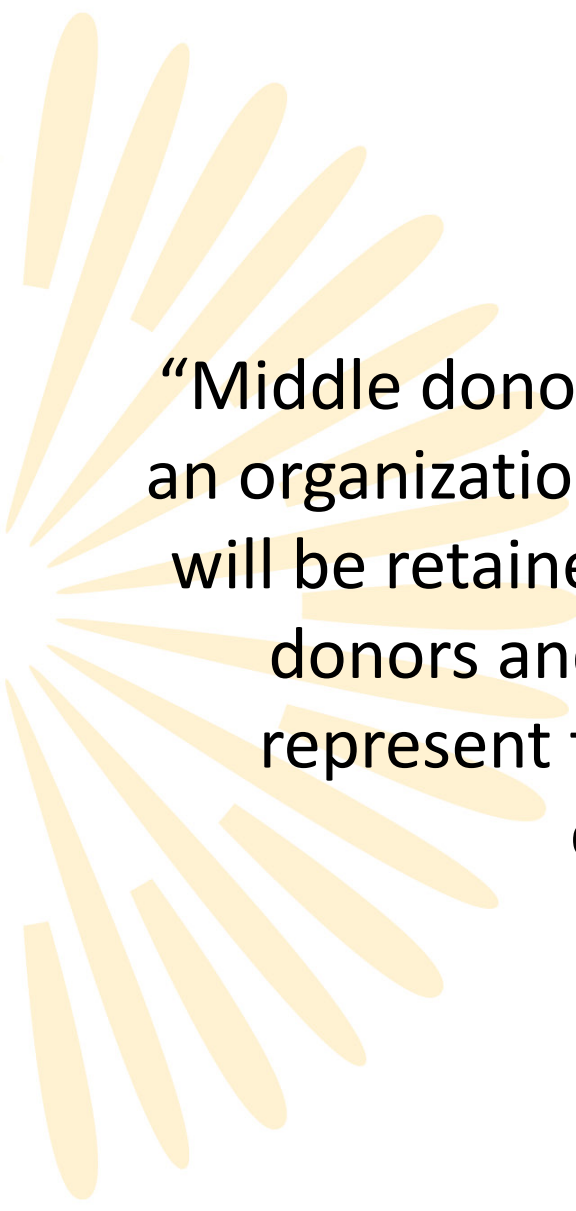
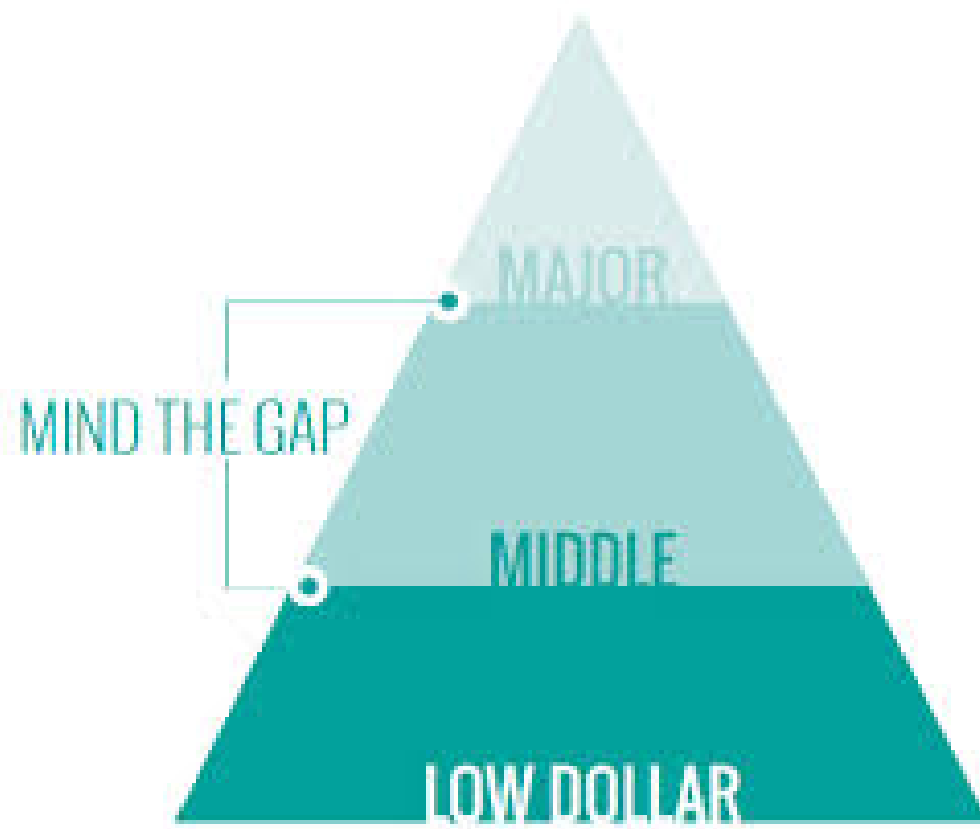


The Middle Chasm:
Leveraging Leadership Annual Giving



“Middle donors should be viewed as a central part of an organization’s lifetime value efforts. Middle donors will be retained and upgraded far more than smaller donors and far more than major donors. They represent the most significant block of money, commitment and loyalty.”

– Roger Cravers



Leadership Annual Giving at Massey Cancer Center - A look back to 2005

- Concluding a capital campaign with \$70 million goal
- Staff was shifting
- The annual giving program had 542 donors
 - 362 of these donors were giving \$1,000 or more
- \$793,000 in new gifts and pledges
 - \$754,547 was coming from “mid-level” donor population

95%!

How was this working?

- Entire program was based off a leadership annual giving effort called the Massey Club
- Targeted group of people who made unrestricted gifts of \$1,000 or more
- High-end direct mail packages and acknowledgement letters
- Loyal donor base

Meanwhile in major gifts...

- One dedicated major gift officer was managing the Massey Club program
- Most major gift prospects and gifts were from foundations, corporations and board members – not the Massey Club program
- Massey Club was viewed more as a revenue stream than a pipeline to major gifts

The Goal

Develop a sophisticated leadership annual giving program by finding a way to blend direct mail and major donor tactics.

The Goal

- Shift focus towards donor migration
 - Moving new people into membership
 - Moving people up giving levels within membership
 - Retention
 - Moving people into major gifts
 - Shifting people from major gifts to membership

The Goal

- Focus on personal contact
 - Provide insider information / access
 - Personalized solicitation and stewardship approach
 - Learn who they are and why they give

Massey Club Solicitor Program

- Utilized personal connections of board members and assigned them a volunteer “portfolio”
- Worked in tandem with annual giving staff to personalize solicitations and acknowledgements
 - Handwritten notes inserted into appeals
 - Personalized stationary
 - Follow-up calls to donors during their renewal month
 - Thank you notes and calls once gift was made
- Leveraged personal connections to set up a visits with development officer and tour of cancer center

Massey Club Solicitor Program

- Learned solicitation preferences
- Gathered key information about donors and prospects
 - True capacity and inclination to give
 - Interest and philanthropic giving priorities
 - Affinity to cancer and our organization
- Secured more visits
- Developed deeper, more meaningful relationships

Massey Club Solicitor Program Staff Responsibility

- Tracking volunteer prospect relationships
- Reporting progress
- Coordination of high-end mail pieces
- Notification once gift was made
- Assisted board members with large “portfolios” with thank you letter process

The Investment

- Staffing
 - Director of Annual Giving position created in 2005
 - Assistant Director of Annual Giving created in 2009*
 - Assistant Director of Leadership Annual Giving created in 2011
 - Coordinator of Annual Giving created in 2012

The function of the assistant director of leadership annual giving is to provide a single, comprehensive view of leadership annual donors and prevent them from falling into the gap.

Results

- Successfully built a robust pipeline to and from major gifts
- Built a stronger, more successfully leadership annual giving program
 - 542 Donors → 5,124
 - 362 Massey Club Donors → 505
 - \$793,000 in new gifts and pledges → \$1.93M
 - \$754,547 in Massey Club Revenue → \$1.4M
- Massey Club retention rate hovers around 87%

Shared Themes

- There is no substitute for personal contact
- Investments are required:
 - Dedicated staff
 - Commitment from leadership
 - Budget to outsource certain functions
 - Time
- Major gift officers and mid-level donor officers need to work together