



Middle-Donor Syndrome:

Launching (and Growing) a Hospital Mid-Level Giving Program



Today's speakers



Bente Weitekamp
VP, Development
Community Health Network Foundation



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AVP Client Strategy
Pursuant



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VP Client Strategy
Pursuant



Today's agenda

1. Why Mid-Level
2. Identifying Opportunity & Informed Strategy
3. Internal Planning for Success
4. Real World Example: CHNF Tier Mid-Level Journeys
5. Open Discussion

Why Mid-Level



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Why Prioritize MIDLEVEL

When done right Mid-level donors are often the most loyal and valuable on file...



60-70% Retention Rate should be the expectation



5% of your Direct Response file producing 25% of Revenue



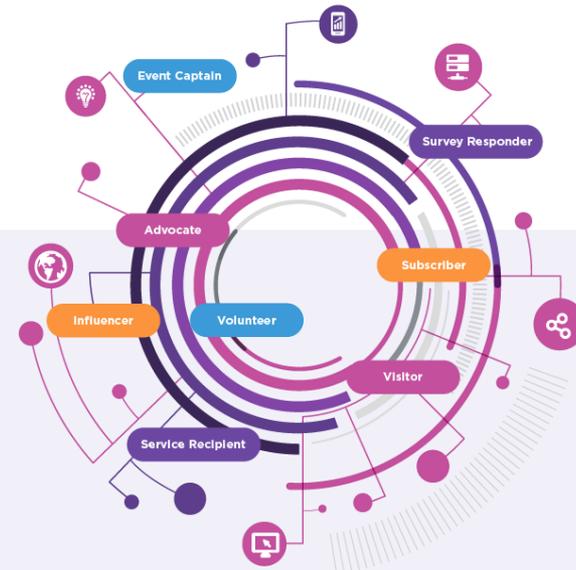
Support Sustainable Program Growth & Pipeline Development

Constituent Journey & Experience

Linear Mindsets of the Past



Today's Reality



A more Holistic Approach

CONNECTING THE DOTS

Marketing | Fundraising | P2P | Events
Advocacy | Brand Awareness | Etc.





Identifying Opportunity & Informed Strategy



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Mapping Data & Opportunity to Strategy

Program Opportunity



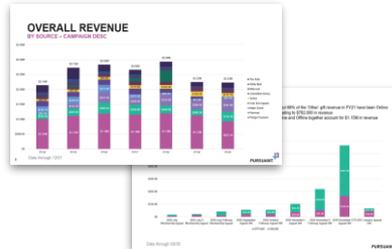
Testing & Optimization



Donor Insights



Performance Measurement



Key Mid-level Metrics

- Donation Frequency
- Mid-level Donor Retention Rates
- Average Annual Giving Per Donor
- Mid-level Donor Lifetime Value
- Number Moving Into Major Gifts
- Annual Revenue





Mid-level Engagement Process



IDENTIFY

Demographic Insights
Loyalty Indicators
Wealth Factors



ENGAGE

Personalization
High-touch
Tailored Experience



LISTEN & INFORM

Survey & Mission Impact
Pre-Lapse Contact
Upgrade Solicitation



TRACK & OPTIMIZE

Measure Success
Portfolio Optimization
Moves Management



Internal Planning for Success

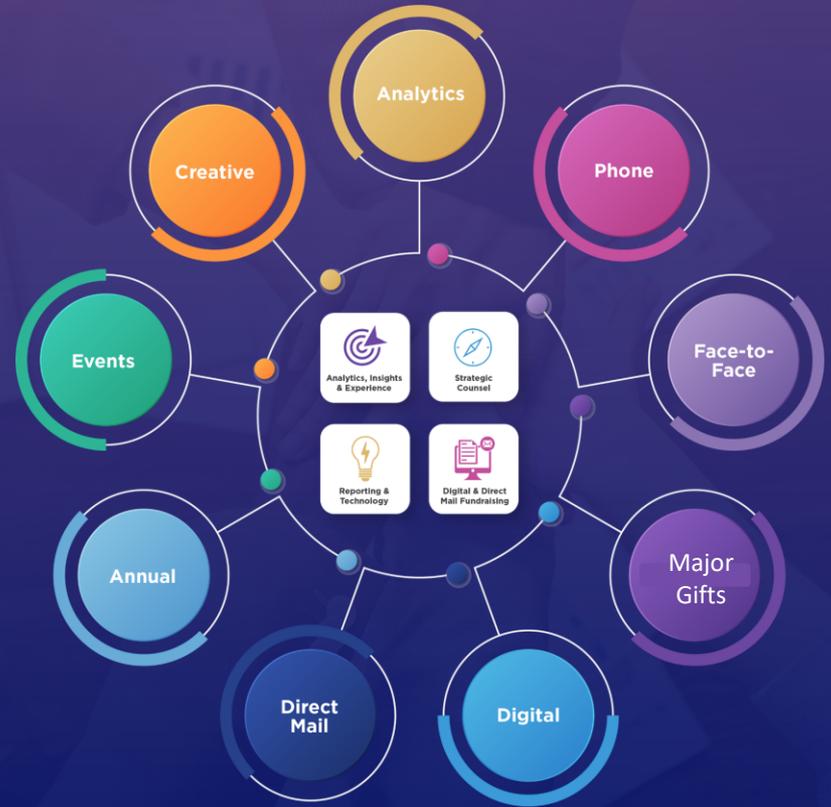


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Consider the full Support **Structure**

- **People**
Dedicated Staff | KPIs | Champions
- **Process**
Identify | Activation | Stewardship
- **Platforms**
Screening | Solicitation | Offers
- **Performance**
Analytics | Reporting | Business Rules





Real World Example: CHNF Tier Mid-Level Journeys



GivingDNA Insights

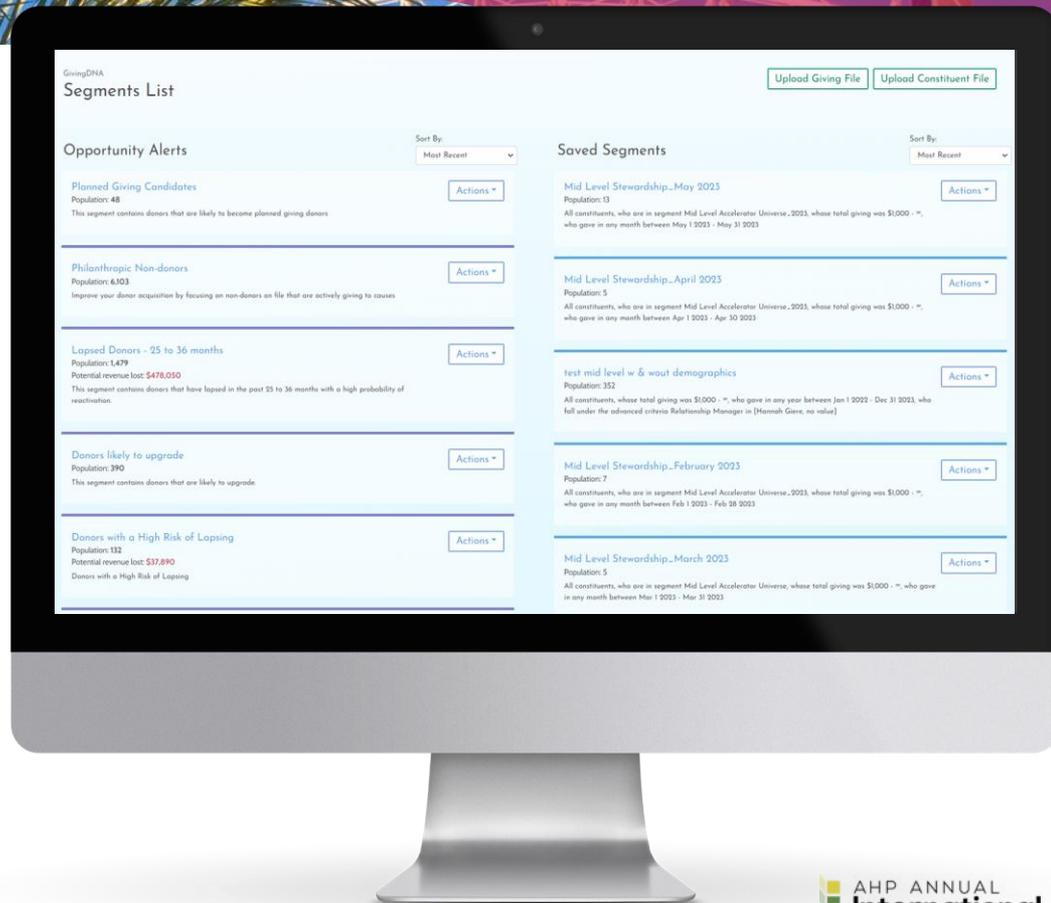
Uncover Priority Mid-level Audience

Mid-Level Segments

- Mid-Level **Prospects**
- Mid-Level **Pre-Lapsed**
- Mid-Level **Stewardship**

Opportunity Segments

- Planned Gift Candidates
- Audience Channel Preferences
- Likely Cryptocurrency Donors
- Donors most likely to upgrade their giving





Building a tiered **Tailored Experience**

Communications	General Mid-level	Mid-level Accelerator
Personal thank you note	✓	✓
General stewardship including newsletters	✓	✓
Direct mail appeals	✓	✓
Stewardship videos	✓	✓
Invitations to special events	✓	✓
Upgrade appeal in elevated “proposal” format	✓	✓
Individualized stewardship		✓
Pre-lapsed thank you		✓
Phone Outreach		✓

Engage through Preferred Channels

Focus on Thank You

Steward Mid-level with a personal touch

Video: A special thank you message from Hope

Hello AJ and Tammy,

Hope, a grateful Community patient, made this video to say thank you for your continued support of the Oncology Patient Assistance Fund.

We are so thankful you have been a part of her journey.

Libby

[Watch your video](#)

 **Community**
Health Network Foundation



Mr. AJ and Tammy Wilkerson

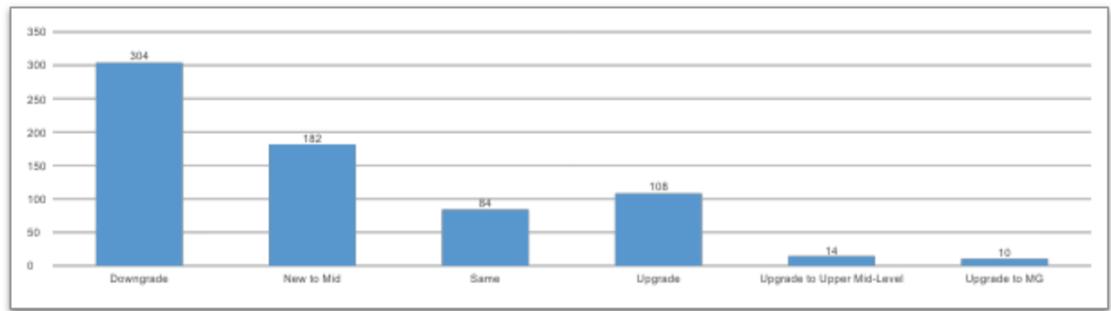
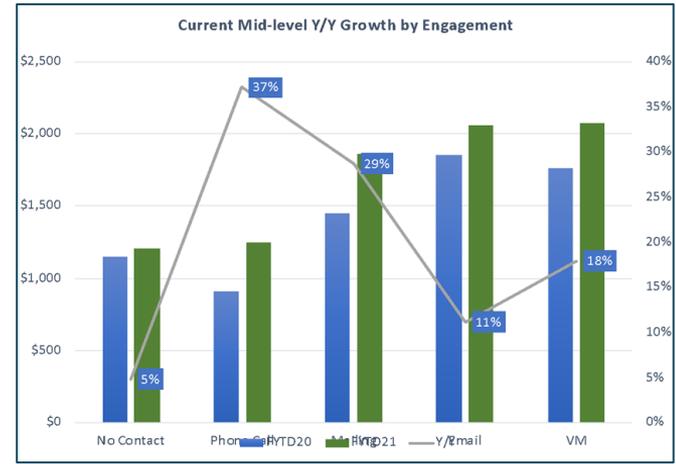




Track & Optimize Program Performance

MEASURE WHAT MATTERS

- Mid-level Retention and Reactivation in 2022
 - 15% of Mid Level donors were reactivated donors
 - 71% of Mid Level donors were retained
- Personal Engagement Performance
- Mid-level Donor Movement →



Building a Tailored Mid-level Experience

- Leverage Data to Focus on the *Right* Donors
- Ask & Listen | Invite Feedback
- Align Resources to Opportunities
- Engage through the Appropriate Channels
- Tailor the Message, Offer, and Invite
- Timing Matters
- Communicate More... not less
- Focus on Stewardship & Impact

Open Discussion

The logo for the AHP Annual International Conference. It features a vertical bar on the left with four colored segments: yellow, green, blue, and purple. To the right of the bar, the text "AHP ANNUAL" is in a small, black, sans-serif font. Below that, the word "International" is in a larger, bold, black, sans-serif font. At the bottom, the word "CONFERENCE" is in a medium-sized, black, sans-serif font.

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