

Fundraising stream sponsored by

More

Making the most of the middle

Rosie Dale

Partner
More Partnership

Chair: Louise Bennett

#IDPE19

IDPE 2019 Annual Conference

More

Making the Most of the Middle

Rosie Dale, Partner - More Partnership

*“No one much respects the middle of things.
Middles are bland and boring.”*

Alia McKee and Mark Rovner - Sea Change
Strategies: ‘The Missing Middle’

In this session we will explore:

- Why your mid-level donors are so important
- What we know about them from university data
- What experiences we are giving them
- Some top tips for creating a successful mid-level giving programme

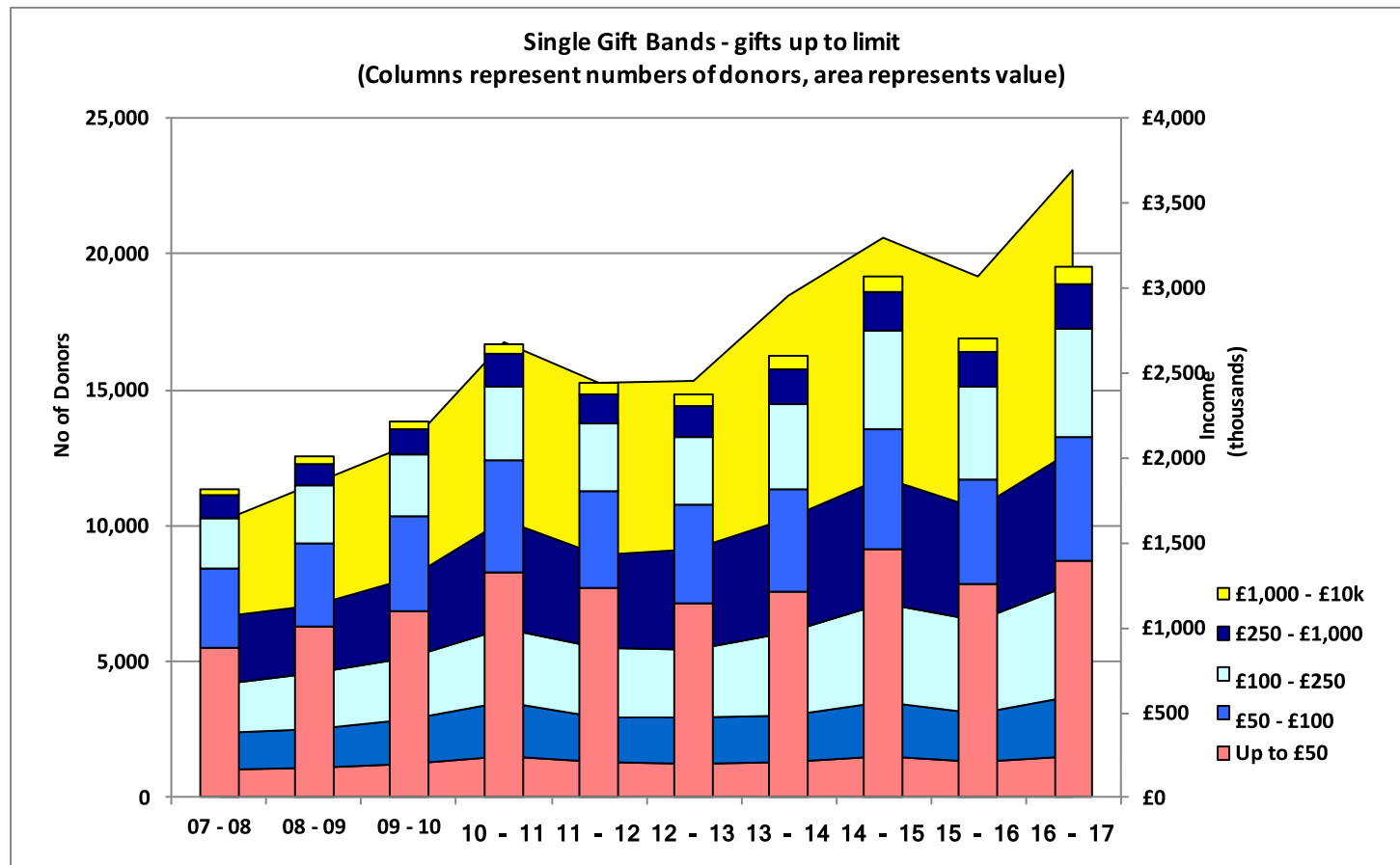
Typically 50%+ of regular income comes from 3% of donors who each give £1k-£10k

50% of the
money

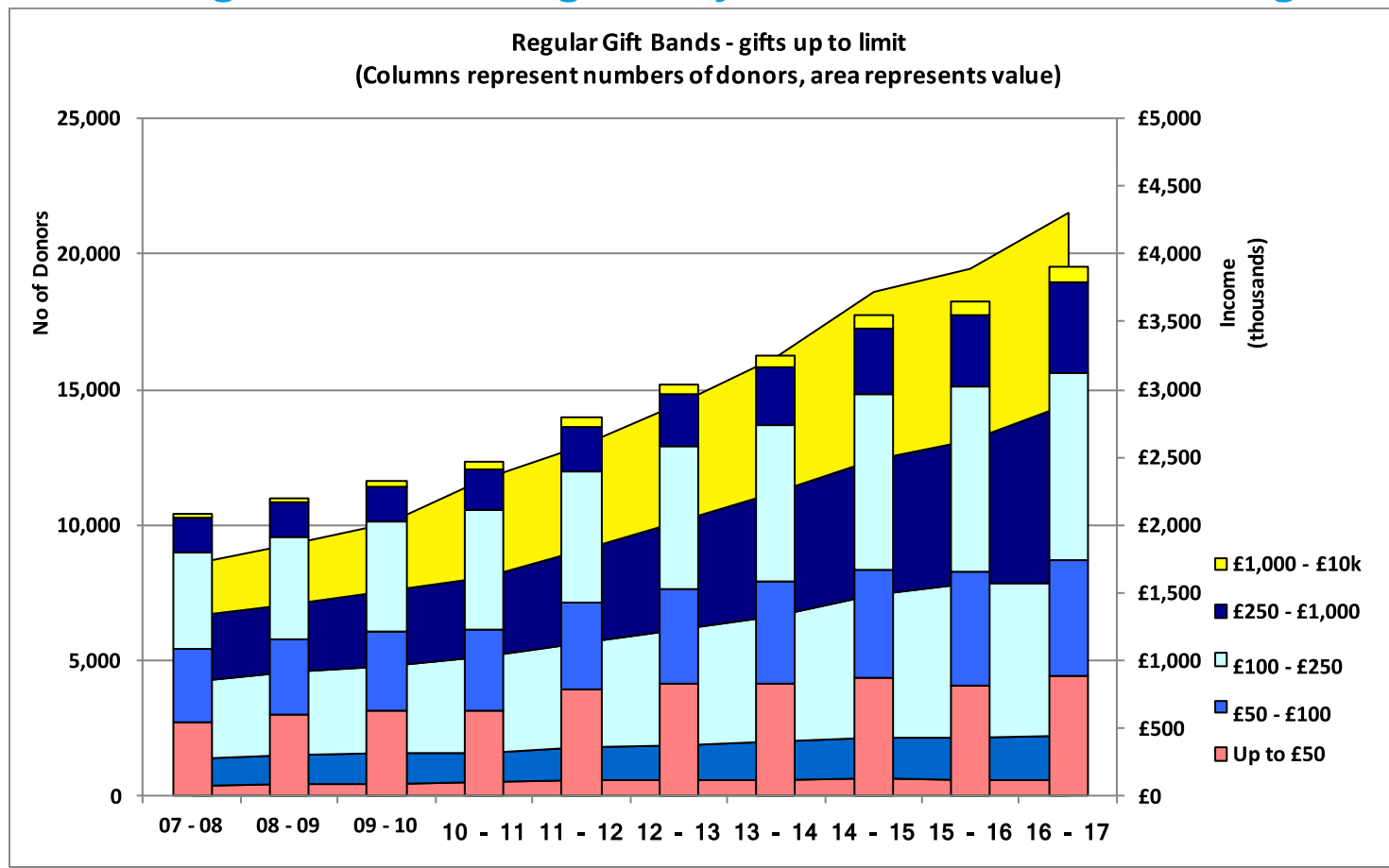


...from 3% of the
donors who each
give £1,000-£9,999
p.a.

45% of single income is given by 3% of donors who each give £1,000-£9,999

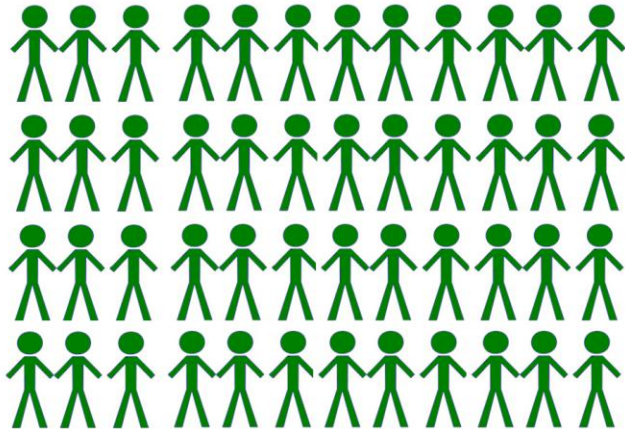


33% of regular income is given by 3% of donors who each give £1,000-£9,999

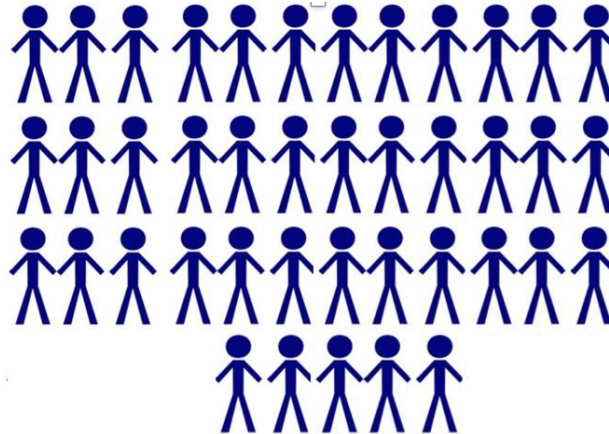


In both universities and Oxford colleges 3% of donors is, on average, just 89 people

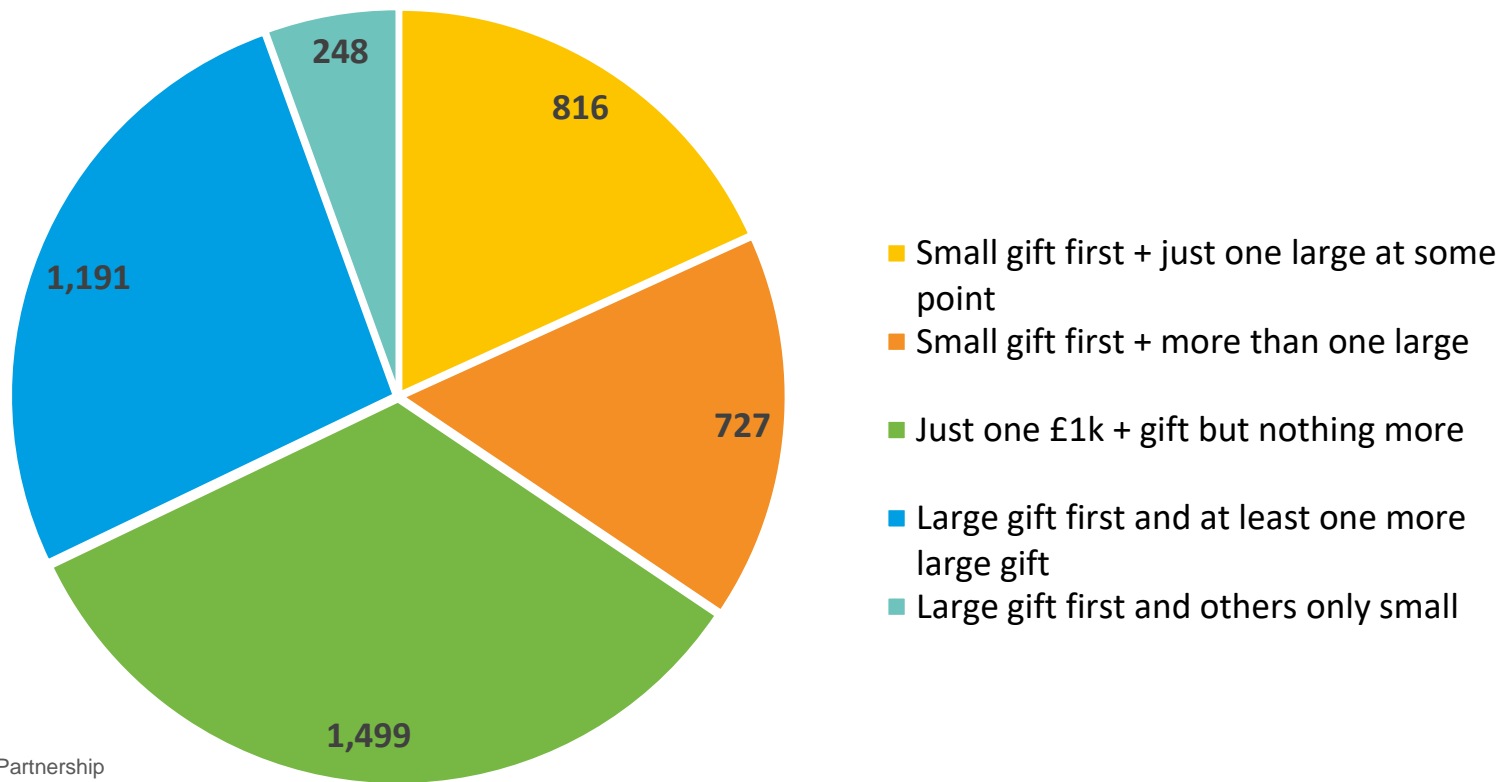
48 cash donors



41 DD donors

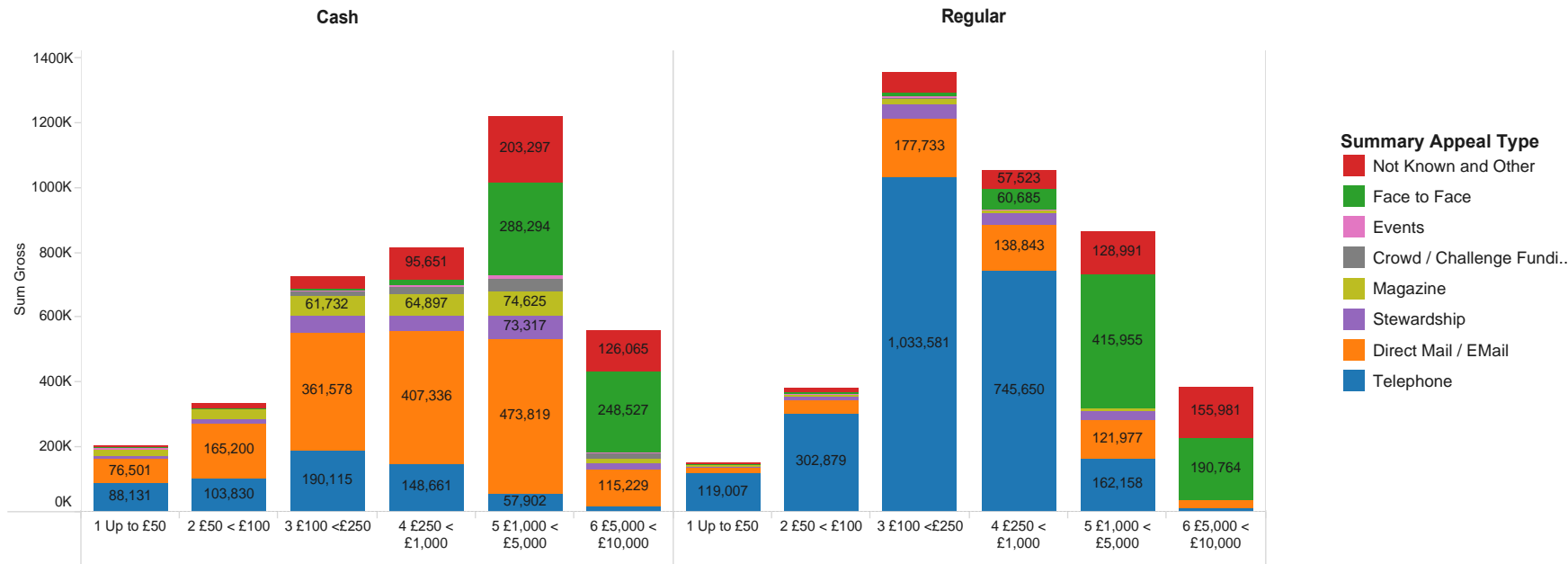


Donor behaviour before and after a gift of £1,000 or more

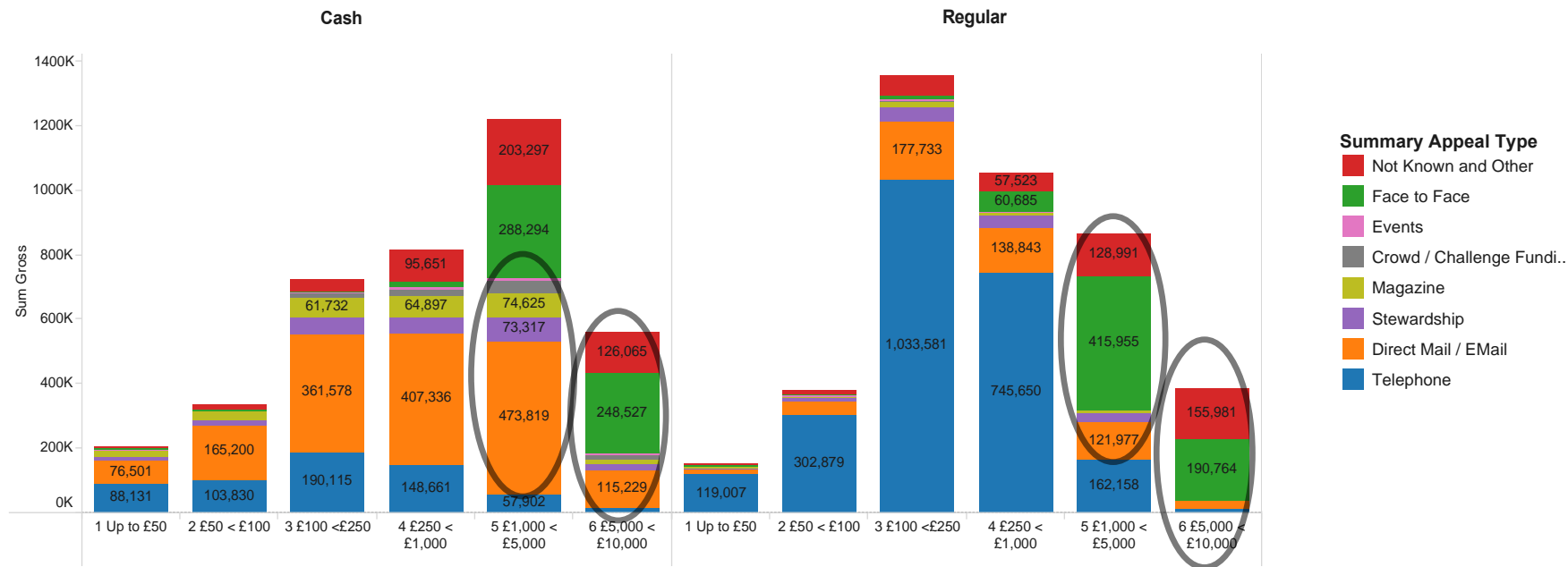


In developed programmes:

- Direct marketing dominates cash giving at all levels up to £5k
- Phone dominates regular giving acquisition



Giving above £1k is driven by direct marketing and face-to-face asking





"You never really understand a person until you consider things from his point of view . . . until you climb into his skin and walk around in it."

Dominic the Donor



Climb into your donors' skin and walk around in it

You are the donor.

The scenario you have been given has really happened to you

In your tables use the next three minutes to:

1. Decide on two words that sum up how the experience has left you feeling.
2. Come up with one sentence that describes why you didn't give again.

Scenario 1 - David



Scenario 1 - David

David has received a number of phone calls over the years asking him to support student bursaries at his school. He always says no. A year ago a letter came through the post asking him to give to an appeal for the Library. David loves books and decided to give £1,000 to support the appeal.

Following the gift he received a nice thank you letter. Nine months later he received another phone call from a student asking him to give to student bursaries. He asked the student about the Library appeal but the student didn't know anything about it other than some vague recollection that it had happened last year and must now be finished. David did not make another gift.

Why has this happened?

What do we think made David give?

- Change of channel and/or purpose?

Why did David not give again?

- Did he feel appreciated?
- There was no plan for what happened next
- Was it “retainable acquisition”?
- The next ask was not personalised

What can be done to change it?

- Find out what motivated the donor to give in the first place
- Plan for the next ask when the first gift is received
- Show impact of initial giving via stewardship
- Where possible make asking consistent over time
- Acknowledge prior giving behaviour and personalise
- Write to him rather than phoning him

Scenario 2 - Helen



Scenario 2 - Helen

Helen gave £500 by cheque to her school in the recent phone campaign. She received a nice thank you letter and a note from the caller.

Six months later, Laura, a member of the school's fundraising office, sent her an email thanking her and saying she'd like to come and visit her to talk to her about some of the other projects they were fundraising for to see if she might want to help a bit more. Helen agreed to meet Laura and they had a lovely meeting over tea and cake.

In this meeting Laura thanked Helen for her giving, told her in detail about a scholarship programme and asked if she would be able to make a gift of £2,500 to support a student. Laura promised she would hear from the student about how her donation had helped them.

Scenario 2 – Helen (ctd)

Helen agreed to give and following the visit had a number of personal phone calls and emails from Laura thanking her for her gift and the impact it will make.

A few months went by and Helen received an email from Laura to tell her that she was leaving the school, thanking her for her gift and letting her know that someone else would be in touch soon.

18 months has gone by and apart from receiving a standard donor report in which there was a page and a half on the overall student scholarship programme she had supported, she has heard nothing more. She has not been asked to give again or made another gift.

Why has this happened?

What do we think made Helen give?

- A positive experience of giving her first gift
- Good stewardship
- A well executed personal ask

Why did Helen not give again?

- No succession plan
- Expectations not met
- Poor stewardship
- Not been asked again

What can be done to change it?

- Create a list of donors like this and make it someone's responsibility to track what's happening with them
- Ensure a certain level of communication is maintained even when posts are vacant
- Make some personal contact with the donor – e.g. a phone call
- Personal attention and feedback is important but don't promise too much at the initial meeting
- Prepare information about the income at risk if donors like these are lost

Top tips for a successful mid-level giving programme

- Work out **how much these donors are worth to you** and share it
- **Extract a list** of these donors and pin them up somewhere
- **Make a plan** for what will happen to these donors and track that it's done
- Use a combination of personalised attention and direct marketing. A '**one-to-some**' approach.
- Write to them – **direct mail works**
- **Raise donor sights** with higher ask prompts on donation forms
- **Steward** them
- **Donation forms in donor reports** work to generate more giving. Include them.
- **Measure** income and repeat giving from this group

Raise donor sights

Thank you for believing in Bristol.

I would like to make another gift to the
University of Bristol

☐ £25 ☐ £50 ☐ £100

☐ £500 ☐ £1,000* Other _____

I enclose a cheque / CAF voucher payable to the University of Bristol ☐

Cheques can also be made in Canadian dollars.

Please debit my VISA / Mastercard / VISA debit card / CAF Charity Card (complete details below) ☐

16-digit card no.

Issue no.

Start date

Expiry date

Signature

Date

To make your gift online please visit bristol.ac.uk/donate

*Join the Bristol Pioneers. Any gift of £1,000 - £24,999 will entitle you to become a Bristol Pioneer, a group founded to recognise those who make an exceptional contribution to the University of Bristol.



Questions