



DONOR EXPERIENCE OFFICER (DXO) PROGRAM

Mid-level or leadership annual giving donors, are a popular topic right now. Everyone has now come to the realization that no matter how you define them, those donors who give more than the typical annual fund donor and are not yet assigned to someone represent an incredibly valuable donor segment. Across most non-profits, donor counts are down but those that are giving, give more, so dollars are up. But we all realize this is not sustainable. In order to keep the major gift pipeline filled these mid-level donors need to be treated in such a way that are invested (both in their giving and in their interest).

A mid-level giving strategy should positively impact several KPI's: retention, cumulative giving and number of MG and PG leads generated. These donors need special treatment, one-to-one stewardship and communication, as well as appeals that align with what the donor cares most about.

StoryCause launched our Donor Experience Officer (DXO) program in 2024. Since then, our DXO's have increased these KPI's for our DXO clients, building strong relationships and uncovering the next major gift and planned giving opportunities.

This data is from one of our clients that has two DXOs: we looked at the cumulative giving of the donors that are now in the two portfolios in Q3 of last year (before they were in a DXO portfolio) and this year (when they have been in portfolio for at least some of the year).

- Portfolio 1, in Q3 of 2024, these donors gave a total of \$195,959 and in Q3 2025 that same population gave \$215,465 - an increase of \$19,506 or 9.95% .
- Portfolio 2, in Q3 of 2024 they gave a total of \$216,663 and in Q3 2025 they gave \$278,136 – an increase of \$61,473 or 28%.

While we have not had that second portfolio in place for as long as the first, we focused on a more rigorous select process for the portfolio. . And in 2024, in the two portfolios combined, our DXOs welcomed 24 of their donors to the legacy society.



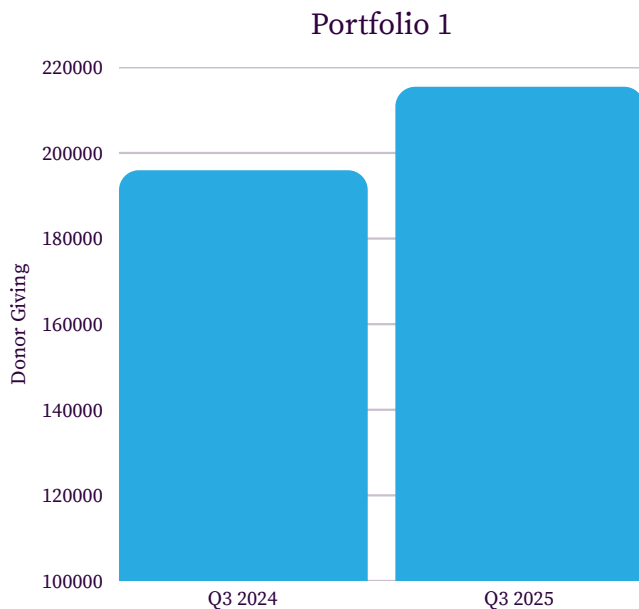
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The donor/DXO relationship typically starts with a stewardship “interview” where we thank that donor, uncover why they started giving and what they want to support going forward. Our DXO’s use email (they have an organization-specific email), mail (cards, notes, etc.) and the telephone to connect with their preferred channels.

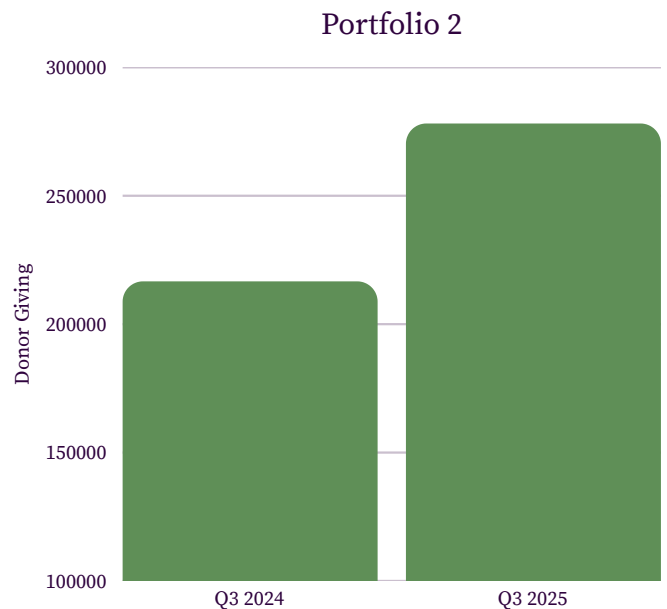
Our goal is to:

- Build relationships through monthly donor specific outreach
- Listen for cues that a donor wants to do more

Stewardship and trust are the foundation of the relationships we build. We also empower our team to make an ask when appropriate and can align that ask with our partners strategic objectives.



10% increase year over year



28% increase year over year