



## Segmenting Your Mid-Level Donors

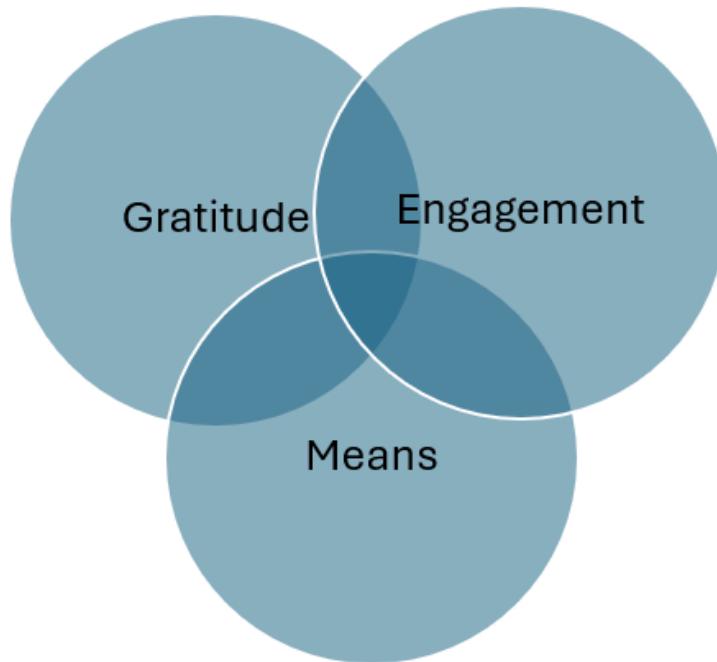
In our mid-level and leadership annual giving programs, we help our clients categorize donors into two groups: **“Settlers”** and **“Pioneers”**.

**“Settlers”** are donors who have settled into a consistent giving amount and pattern. They have found a level and frequency of giving that they are comfortable with and that feels comfortable and sustainable within their budget. This is not a bad thing—an annual \$1,000 donor is highly valuable. These donors should be properly stewarded, and their communication preferences and frequency should be understood. However, they should not be pushed, as they have the potential to become legacy donors

The other group, your **“Pioneers”**, consists of mid-level donors who are more engaged and show giving signals that they are capable and open to potentially advancing their support, if properly stewarded and presented with further giving opportunities that align with their passions.

A key part of many of our mid-level qualification programs is the **initial donor interview**. This can begin with a postcard mailed to the mid-level donor population inviting donors to call in, followed by outbound calls. Donors who take the initiative to call are strong Pioneer candidates – they are taking 20 minutes out of their day to talk about why they give. When asked why they started giving, those who share a compelling **“origin story”** also tend to fall into this category. We may offer a tour or ask whether the donor would be interested in meeting with leadership to explore how their giving could further support the organization. Those who say “yes” to these types of opportunities are signaling a higher level of engagement. These are your Pioneers. On average, 20–30% of a mid-level donor population falls into this category.

**But what if we could identify these Pioneer donors even sooner—possibly as early as their first gift?** The ability to “fast-track” highly engaged donors—to secure a second gift, better understand their motivations, and create a more personalized journey from the outset—can lead to higher retention and a shorter timeline to mid-level giving and, potentially, qualification for a gift officer.



In our mid-level donor interviews, we start by asking open-ended questions to uncover why the donor started giving, why they continue to give and what is most important to them about the work the organization is doing. We give the donor the opportunity to take the conversation in any direction and don't try to limit their responses.

In the second part of the conversation, we ask questions to uncover the donor's openness to have further conversations about **how their support can help the organization going forward.**

As noted above, how a donor answers these questions can help identify your Pioneers. Ensuring these donors are flagged in your CRM provides a valuable data point. Those donors who indicate your organization is their top giving priority, those that say they would be interested in meeting about other opportunities and donors who reveal they give through their DAF or family foundation are indicating which of these donors may be better suited for greater one-to-one connections.

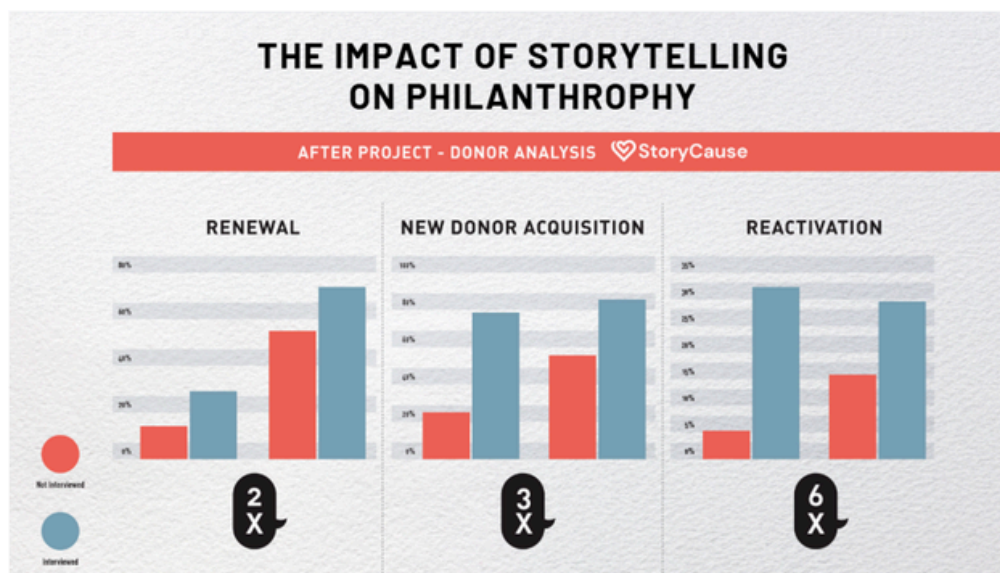
Some of these questions may not be appropriate for new donors. Someone making their first gift is unlikely to view your organization as their top philanthropic priority—yet. The same applies to questions about planned giving. However, other questions align well with first-time donors and can serve as meaningful stewardship opportunities. Offering a tour or a chance to meet with leadership are experiences rarely extended to new donors and can help deepen engagement quickly.

**Of all the questions you can ask a new donor, none is more important than: “Why did you make your first gift?”** A donor’s “origin story” is valuable not only for your organization—helping you understand what drives new donor acquisition and where to focus your efforts—but also for the donor. Sharing a personal story is powerful. Research shows that telling emotional stories can trigger the release of oxytocin (often called the “love hormone”) in the brain, which promotes positive feelings. Oxytocin can reduce anxiety, lower stress, and increase trust and emotional well-being. It also influences how people process social information. In practice, this means that when donors share why they give, it reinforces for donors their emotional connection to your mission and the impact they help make possible.

When a donor shares an emotional story about why they started giving, it is a strong indicator that they are engaged and invested in your mission. These donor can immediately be flagged as Pioneers.

While they may not have the capacity to make a large gift at this time, they may become a volunteer, advocate, or champion who encourages others to get involved. Pioneer donors do not necessarily have to be your largest donors (although many of your largest donors are likely Pioneers), but they can be among your most passionate champions.

**And there is another benefit to having a donor share their story – their giving increases.** We worked with two of our higher ed partners to track annual fund giving for alumni who share their story about their time on campus versus those who do not. Across all donor segments, alumni who share their story give more—or are more likely to make their first gift—than those who only receive an annual fund appeal.



Here is the challenge: To uncover your Pioneer donors requires one-to-one connection at scale, which is not feasible for most nonprofits. As a result, a more strategic, triaged approach is needed.

**Looking at key factors—such as wealth screening results and the size of the first gift** (as well as engagement signals like response channel or referral source, if applicable)—can help determine where to focus your time. The same principles apply when identifying a group for fast-track outreach among new donors.

Thank them promptly and incorporate them into a structured new donor welcome plan. Then, carve out time to try to connect one-to-one with as many high-potential new donors as possible. When reaching out by phone, begin by making it clear that the call is not a solicitation and that you simply want to express your appreciation.

A sample script for the opening of this call might sound like:

*“Mrs. Jones, this is John Smith from ABC International. First, I want to assure you that this is not a solicitation. I’m calling to personally thank you for your recent gift of \$X. Gifts like yours help us [impact statement]. If you have a moment, I’d love to ask a couple of quick questions. To start, what prompted you to make your gift? Was there a person or event that inspired your generosity?”*

We conduct thousands of these “interview” calls each year for our clients. By leading with the assurance that there will be no ask, donors are immediately put at ease. It is not uncommon for these calls to last 20 minutes or more, as many donors are eager to share why they gave and how they hope their support will make a difference.

We typically begin with a few open-ended questions, encouraging donors to speak candidly about what prompted their gift and what they are most interested in supporting moving forward.

Toward the end of the call, we ask a series of questions to identify donors who may be interested in doing more. This is where we explore opportunities such as taking a tour, meeting with leadership, or learning more about volunteer involvement.

Once the call is complete, it should be clear whether the donor is truly invested in your organization, in a trial phase (having made a gift but unsure about continuing), or if the gift was a one-time contribution.

Depending on your CRM, you may be able to capture some or all of these responses within each donor record. At a minimum, adding a flag to indicate your most engaged donors—or those with a compelling story—can be highly valuable. This signals to a gift officer that they should review the donor’s background and understand their story prior to outreach. Also, if the donor indicates what part of your mission they are most interested in supporting, you can begin to customize stewardship and appeals to align with this interest, making these touchpoints more personal and more likely to resonate.

Using the results of the interview, along with what you already know about their donor and their giving history to your organization, you can create a sort of “donor scorecard”. And one other – not inconsequential – benefit to capturing these origin stories: marketing. Building an archive of these stories creates a steady stream of content that can be leveraged across other outreach channels.

By identifying your most engaged donors early in their giving journey—as early as their first gift—you can begin to earmark those who are most likely to move into mid-level and, ultimately, major giving. For example, **if you acquire 10 new donors in a given week, knowing which 2–3 are most invested in your mission helps you prioritize where to focus your limited resources.**

By thanking these donors personally and demonstrating that you value the relationship, you begin to plant the seeds for faster upgrading and long-term engagement.