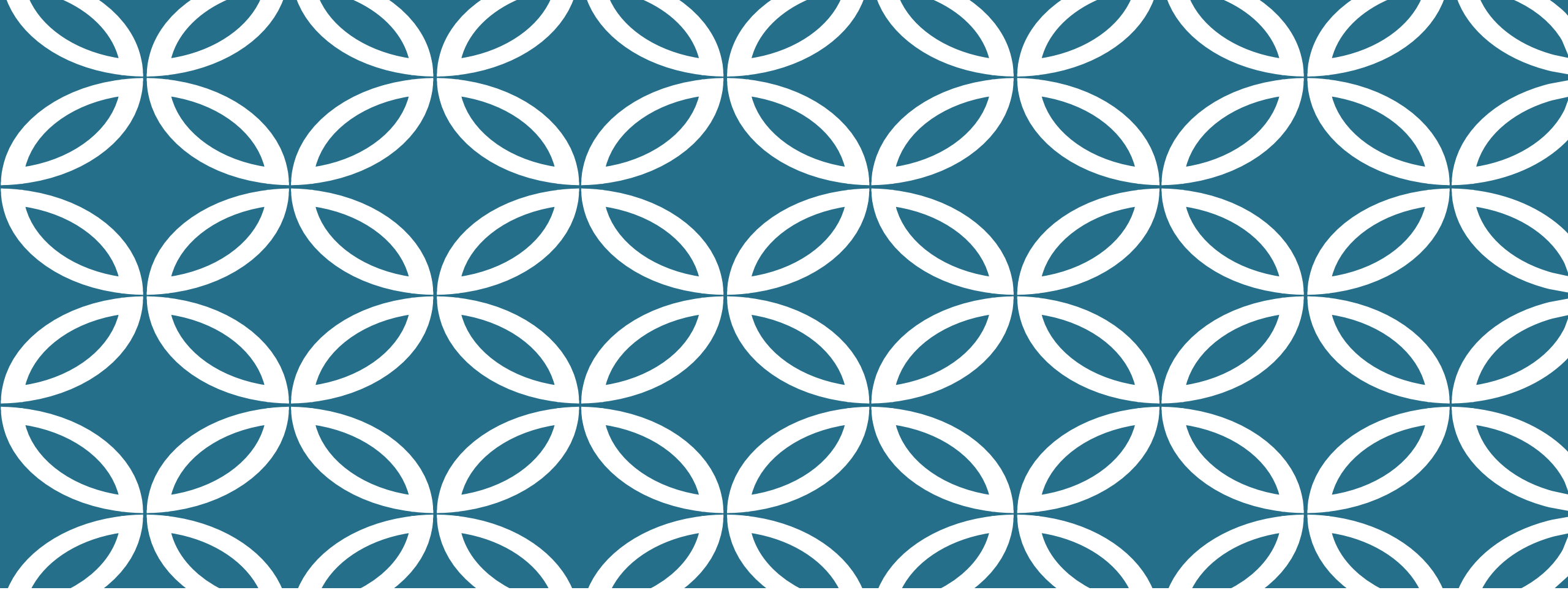
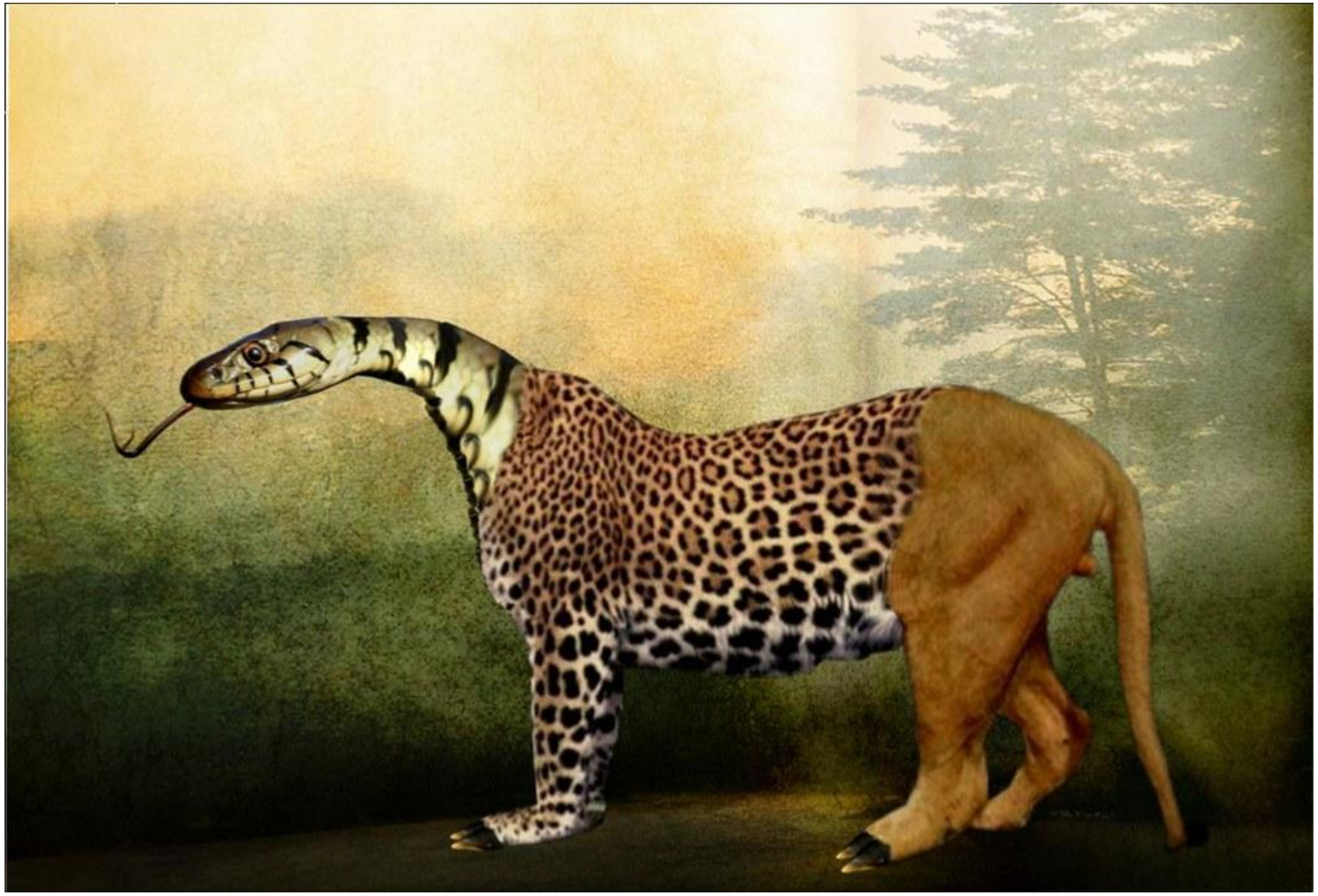


MID-VALUE GIVING

Everything you need to know to get started

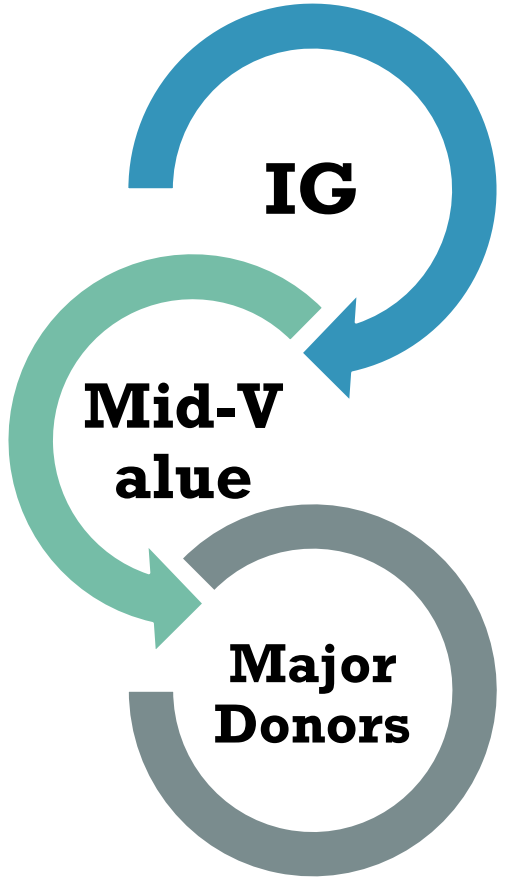
MID-VALUE IS UNLIKE ALL THE REST



MID-VALUE'S ROLE IN YOUR FUNDRAISING STRATEGY

What is the added value?

- ✔ Creates pipeline for major gifts and increases average gifts from IG file
- ✔ Provides an important way to transition the gap between IG and Major Donors
- ✔ Increase donor value and loyalty over the medium/long-term
- ✔ Brings existing supporters closer to the cause and plants seeds of 121 stewardship
- ✔ Helps organisation break down silos between teams and increases collaboration



THERE'S NO SINGLE DEFINITION OF MID-VALUE

Lowest start value was £100, and the highest limit was £30,000

Average gift ranged between £586 and £8,461

Numbers of supporters in a file varied from 150 to 23,000

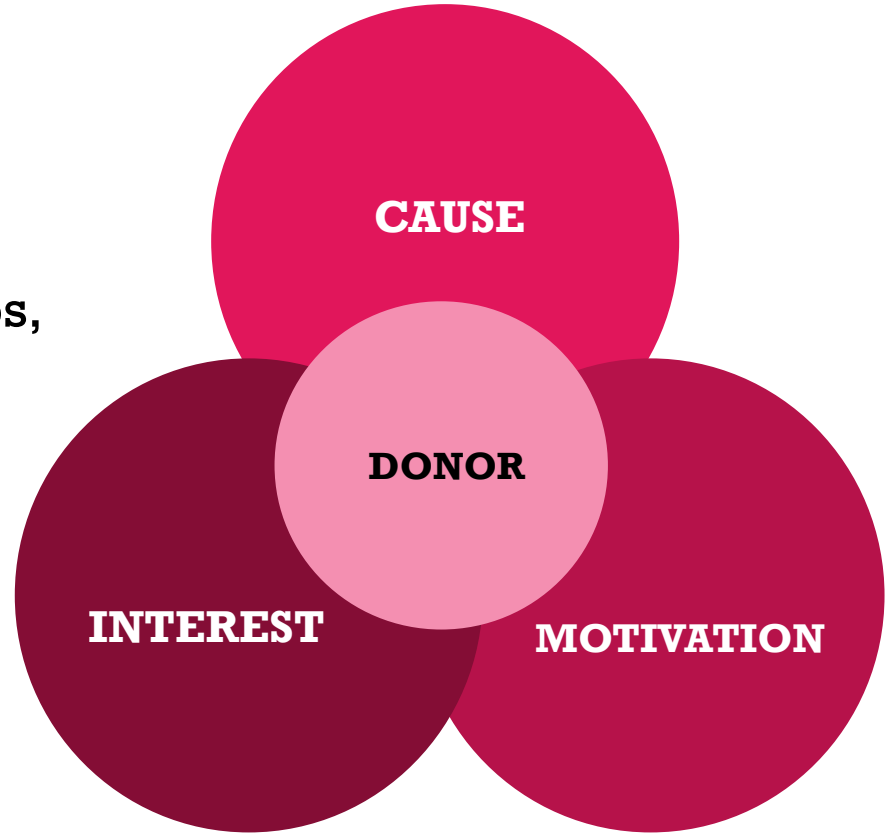
Plan International UK:
Combined value of current total RGs + largest total amount of cash given within a 12-month period that is within the last 24 months must be >= £400 and <£10,000

WHO ARE YOUR DONORS?

Use your database or segments to analyse donor data. Look for trends in **giving history, frequency and capacity.**

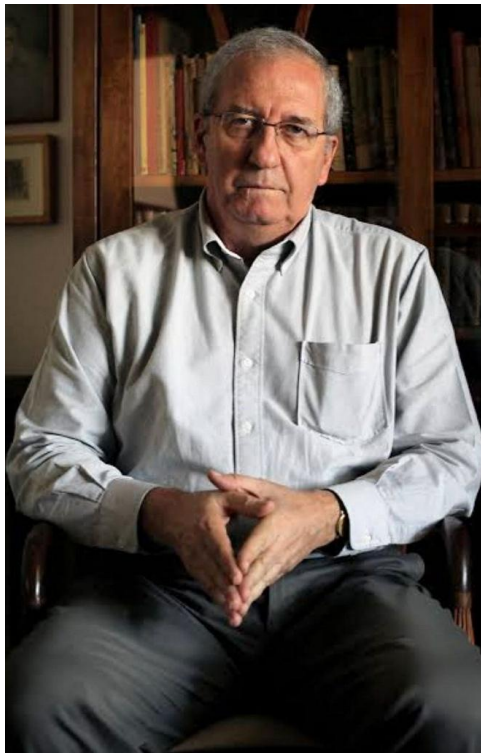
Involve your prospect researcher to help fill in any gaps, but this is a good starting place:

- Donation amount
- Communication preferences
- **Giving motivation!**
- Engagement level
- Demographics

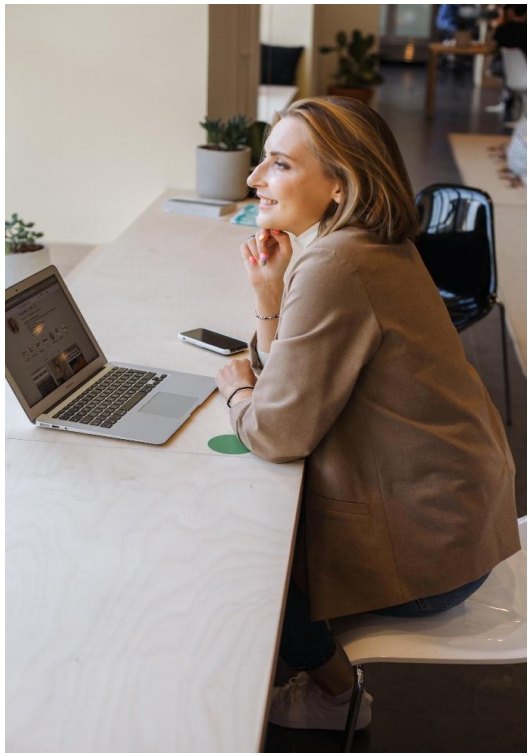


DEVELOP MID-VALUE PERSONAS

HELEN



NIGEL



BETHAN

WAYS OF WORKING & PROCESSES

Me.

Philanthropy Team

- Major Donor
- Match & Emergency Fundraising
- Trusts & Foundations
- Corporate Partnerships
- Prospect Research

Individual Giving Team

- Retention
- Legacies
- Sponsorship Experience

Supporting Teams

- Supporter Care
- Sponsorship Operations
- Finance Team
- Data Team

MID-VALUE & PHILANTHROPY

Helps to identify potential Major Donors

More time to prioritise higher value donors and prospects

Major Donors will sometimes dip their toe in the Mid-Value pond

PROCESSES FOR MID-VALUE & PHILANTHROPY

MAJOR DONOR TEAM

- ✓ Hierarchy of thanking
- ✓ Identifying potential Major Donors
- ✓ Content sharing
- ✓ Restricted project proposal templates
- ✓ New Business pitches and opportunities
- ✓ Opportunities for personalised video content
- ✓ Event invites

CREATING THE MIDDLE GROUND

- ✓ Draw from many different areas of fundraising
- ✓ What needs to happen first?
- ✓ Do I need new processes or definitions?
- ✓ Who are my donors?
- ✓ What goals do I want to achieve?
- ✓ What does an ideal annual plan look like?
- ✓ Then be realistic and prioritise!

ANNUAL PLANNING

6 Hard asks

4 soft asks

3 newsletters

Telemarketing

3 Main appeals

Patronage

4 events

2 Direct Asks

2 newsletters

DM pack by email

3 magazines

Christmas legacy event

3 Direct Asks

Emergency telemarketing

4 Direct Asks

3 Soft Asks

Webinar

BEWARE TOO MANY ASKS!

Jump IN PUDDLES

START WITH AMBITION

JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE
Birthday (July - August batch)		Birthday	Birthday (Oct - Nov) batch)		Birthday	Birthday		Birthday (March - April batch)		Birthday	Birthday
Retention emails x1	Retention emails x1	Retention emails x1	Retention emails x1	Retention emails x1	Retention emails x1	Retention emails x1	Retention emails x1	Retention emails x1	Retention emails x1	Retention emails x1	Retention emails x1
		Summer Retention / Impact Report		MV Christmas Appeal DM		Winter Retention / Annual Review + Message from Rose (DM/EM)				MV Summer Appeal DM - Soft Ask	
								Upgrade DM, EM & TM			
Ad-Hoc 121 Stewardship	Ad-Hoc 121 Stewardship	Ad-Hoc 121 Stewardship	Ad-Hoc 121 Stewardship	Ad-Hoc 121 Stewardship	Ad-Hoc 121 Stewardship	Ad-Hoc 121 Stewardship	Ad-Hoc 121 Stewardship	Ad-Hoc 121 Stewardship	Ad-Hoc 121 Stewardship	Ad-Hoc 121 Stewardship	Ad-Hoc 121 Stewardship
Monthly MV Calling	Monthly MV Calling	Monthly MV Calling	Monthly MV Calling	Monthly MV Calling	Monthly MV Calling	Monthly MV Calling	Monthly MV Calling	Monthly MV Calling	Monthly MV Calling	Monthly MV Calling	Monthly MV Calling
Monthly Anniversary Comms	Monthly Anniversary Comms	Monthly Anniversary Comms	Monthly Anniversary Comms	Monthly Anniversary Comms	Monthly Anniversary Comms	Monthly Anniversary Comms	Monthly Anniversary Comms	Monthly Anniversary Comms	Monthly Anniversary Comms	Monthly Anniversary Comms	Monthly Anniversary Comms
					Handwritten Xmas Cards (Top value bands only)						
		Invitations	Invitations	Hybrid Event (MV + PPT)				Invitations	Invitations	Invitations	Offline Event
		Reactivation TM testing									MV Reactivation DM/EM Testing

- ✔ What do I reasonably have capacity to deliver?
- ✔ What needs to be prioritised?
- ✔ How can I we pivot in the most impactful way?

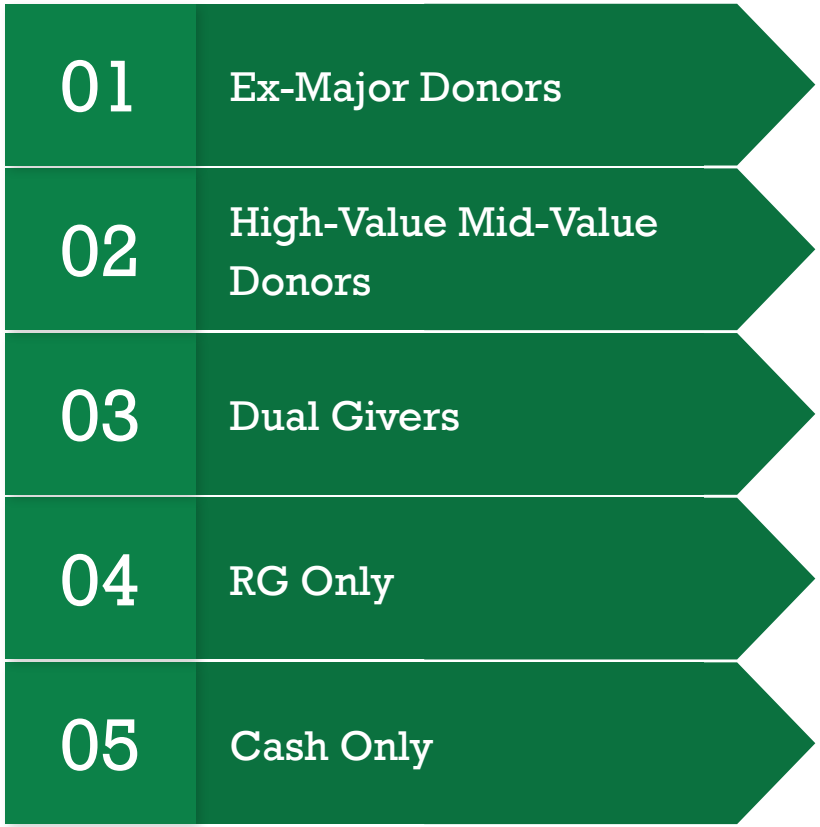
THEN PRIORITISE

WORK SMARTER, NOT HARDER

MID-VALUE ACTIVITY							
JULY	Ad-Hoc 121 Stewardship	Monthly MV Calling					
AUGUST							
SEPTEMBER							
OCTOBER							
NOVEMBER			MV Christmas Appeal DM				
DECEMBER				Handwritten Xmas Cards			
JANUARY					Annual Review + Message from CEO		
FEBRUARY							
MARCH							
APRIL							
MAY						MV Summer Appeal DM	
JUNE							In-Person MV Event

- Sponsorship Birthday Mailings
- Monthly Retention Emails
- Bi-Annual Retention Mailings
- Upgrade – DM and EM
- Reactivation
- Monthly Anniversary Comms

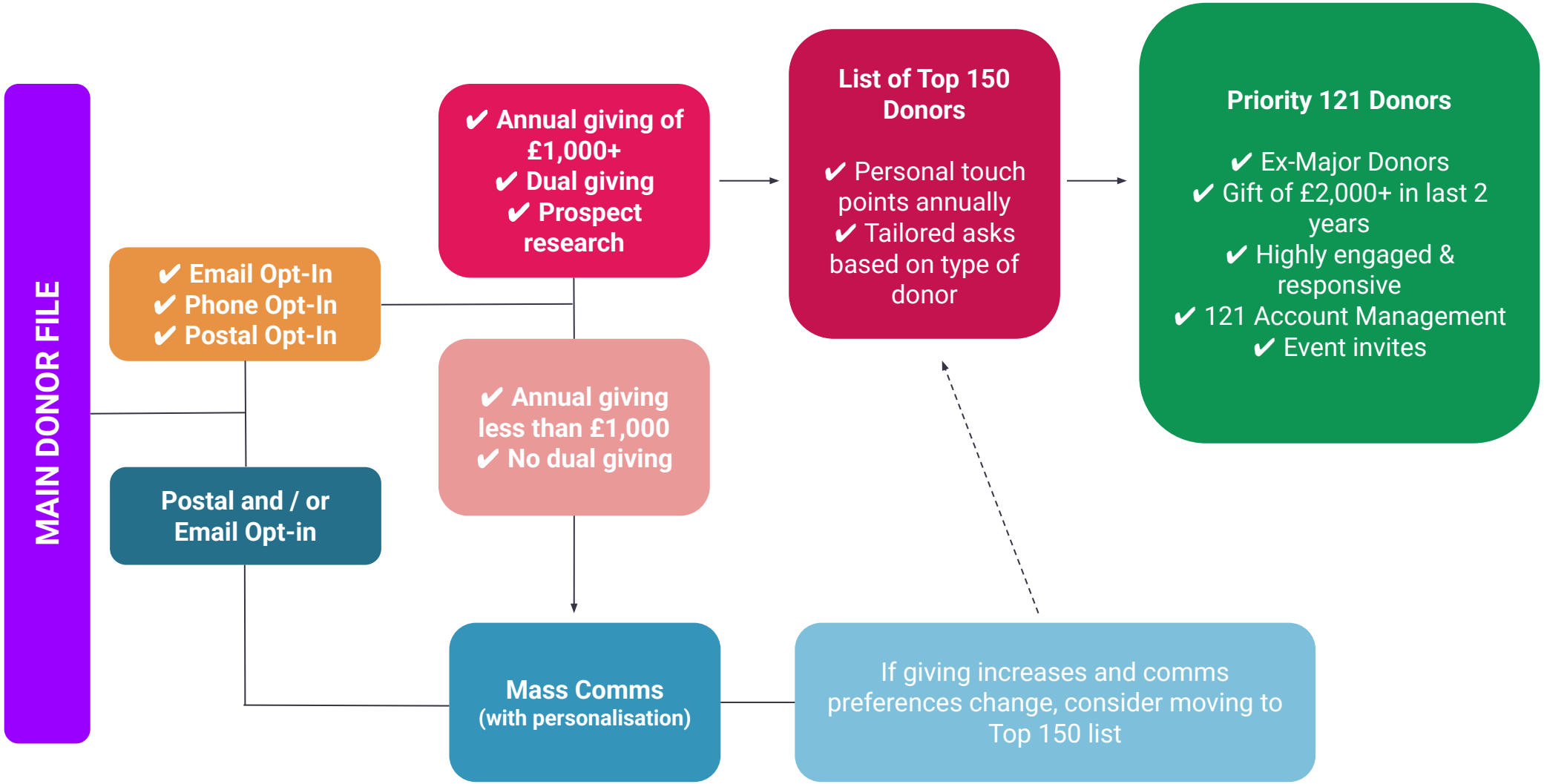
SET GOALS. WHAT ARE YOU AIMING FOR?



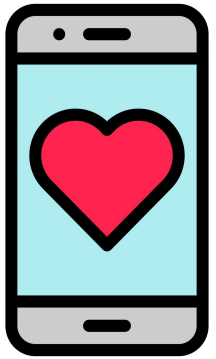
- ✓ Average cash gifts
- ✓ Life-time value
- ✓ Retention goals / 1 – 3yr ROI
- ✓ Conversions from Individual Giving file
- ✓ Upgrades – number and value
- ✓ 121 Stewardship donations
- ✓ Annual Income and/ or per appeal
- ✓ **Other non-financial engagement**

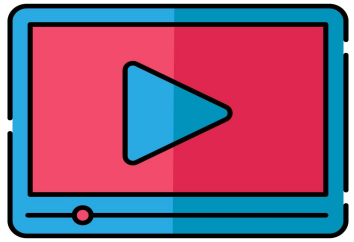
** Example of segments from Plan In. UK Mid-Value file*

STEWARDSHIP SEGMENTATION

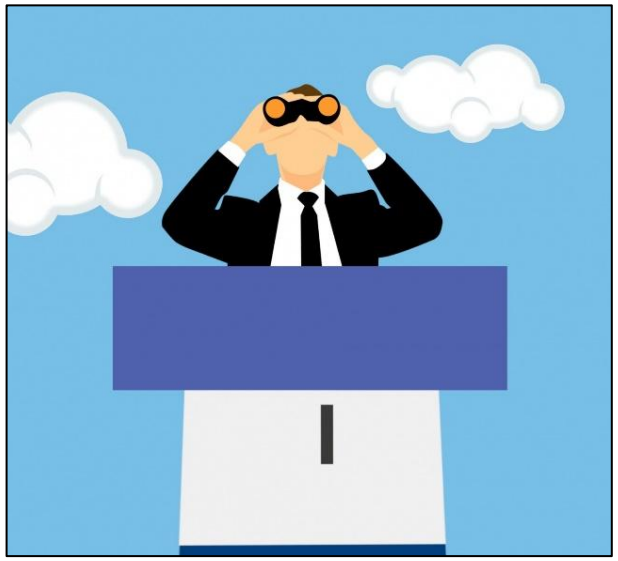


121 STEWARDSHIP FOR HIGHER-VALUE DONORS





MAKING MASS COMMUNICATIONS MORE BESPOKE



Spot opportunities.

Share as much as possible.

Create tailored communications within your capacity.

SOME EXAMPLES…

PLAN INTERNATIONAL For children and equality for girls

<Label Name>
<Organisation>
<House Name>
<Address Line 1>
<Address Line 2>
<Address Line 3>
<Address Line 4>
<Town>
<County>
<Postcode>
<Country>

ENCLOSED:
YOUR CHILD MARRIAGE IMPACT REPORT

Before you read the enclosed letter from our new Fundraising Manager Lynne, I wanted to express my sincere thanks for your continued generous support for Plan International and to children around the world. Right now, children are facing increased challenges in accessing education, learning life skills and achieving their dreams. Your gifts help to implement sustainable and tangible solutions through education and learning programmes that help young people to empower themselves and their communities. Thank you for all that you do.

Rose Caldwell
Chief Executive Officer, Plan International UK

PLAN INTERNATIONAL For children and equality for girls

With compliments

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London, EC1V 9LH
United Kingdom

Tel: 0300 777 9779
Tel: +44 20 7608 1311 (Non-UK)
www.plan-uk.org
Registered charity no. 276035
Registered company no. 1364201
Registered office address as shown

OUR BACK TO SCHOOL ACTION PLAN

Train more marginalised women to be teachers so they can:

- earn their own salary
- learn skills and help the community
- become role models for young girls
- help other women gain independence.

SIERRA LEONE

£1,647: COST TO TRAIN A YOUNG WOMAN LIKE FUDIA TO BE A TEACHER

Every single Plan International supporter has played a role in helping disadvantaged children make incredible progress in recent decades. But the wonderful generosity of a small group of our most dedicated supporters, including you <Mrs Sample>, stands out. You have been a catalyst for change in so many boys' and girls' lives around the world. <ONE CHILD: Through your generous sponsorship, you have helped children like <Name> to/<TWO CHILDREN: Through your generous sponsorship, you have helped children like <Name and Name> to/<MULTIPLE CHILDREN: Through your caring and dedication, you have helped your sponsored children to/<NO SPONSOR: You have helped children> access education, embrace opportunity and decide their own futures. I would just like to personally thank you for your life-changing compassion and kindness.

Thank you and best wishes.

Lynne Davies

Fundraising Manager

Plan International UK

PLAN INTERNATIONAL

For children and equality for girls

"If I was unable to get help from my sponsors, I would have already quit school"

Maria, aged 19, Mozambique

When Maria's mother and sister both died, this bright young student had to drop out of school to look after her younger siblings and her three-year-old nephew.

'I did not want to put pressure on my father fina the purchase of my school supplies, so I told h drop out to help at home.'

Thankfully, Maria was able to enrol in our spo programme, which helped her return to educ

'I am very happy that I finished school and I enrolled in an academy in the city so I can b qualified for work.'

In addition to the letter from John, I wanted to take this opportunity to extend my special thanks for your support, particularly during these difficult times. To demonstrate the difference you are making, I wanted to share Maria's story, which shows that sponsorship and regular gifts can help transform the lives of more girls like her around the world.

One of the challenges we are all feeling is the cost of living crisis. I understand it may not be possible for you to increase your support during these financially difficult times but any support you can give will make an enormous difference.

Thank you so much again for your support

Lynne Davies
Fundraising Manager

PLAN INTERNATIONAL

For children and equality for girls

Registered charity no. 276035

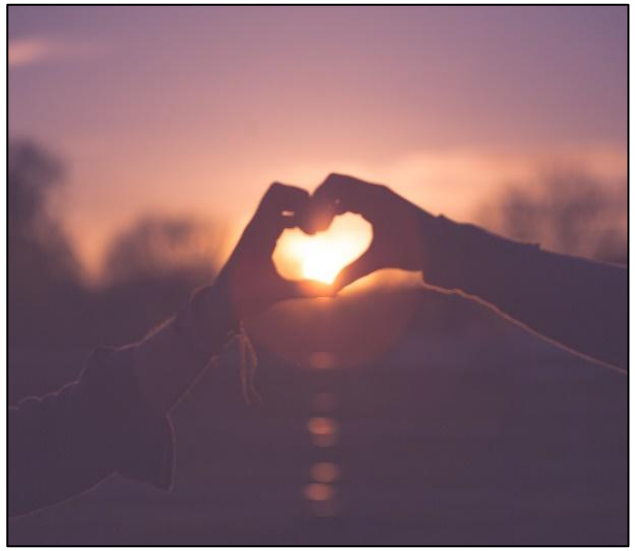
BE DATA DRIVEN

- ✓ Data vs gut feel
- ✓ Don't have knee-jerk reactions. You might not get it right at first.
- ✓ Separate segments for Ex-Major Donors and priority donors
- ✓ Test. But test differently.
- ✓ What external factors may be impacting your results?

DATA ANALYSIS IN THE PIPELINE

Identify who's giving more and more frequently to help inform our 121-stewardship pipeline

Can we illustrate a link between donation uplift and 121 stewardship?



A deeper understanding of our Mid-Value donors and their motivations for support

YOU'VE ALL BEEN WONDERFUL.

DO KEEP IN TOUCH.

linkedin.com/in/davieslynne

hello@lynnedaviesfundraising.com

APPENDIX – FURTHER READING

1. https://www.bwf.com/mid-level-donor-strategy/
2. SOFII · From the Myth Smashers: Guess what? Mid value donors are not major donors in disguise!
3. SOFII · Exploring the evolution and trends of mid-level fundraising
4. Blue_State_UK_Giving_Behaviours_Report_FundraisingEverywhere
5. Sea Change Strategies: missingMiddle4Report.pdf
6. Home - Jump In Puddles