Mid, Major + Gift-in-Will Playbook

This playbook will help you use Dataro to identify the prospects in your database the most likely to give mid-level gifts, major gifts, or to confirm a gift in their will.

Smarter Fundraising for a Better World

A system to find new mid-level, major and GIW prospects

Your database is a tremendous source of potential prospects for your mid-level, major and gift-in-will programs. But at the moment, most organisations have limited capacity to find those donors, often focussing only the people who have previously given larger gifts.

With Dataro, you can replace ad hoc systems with a much more effective approach to regularly scan your database and fill you mid-level, major-giving and gift-in-will pipeline. This will help your program and relationship managers to focus their time and effort in those areas likely to yield the best financial results.

This Playbook tells you how to implement this new approach.

Mid-Level Giving

Goal: to identify and convert more potential mid-level donors

Includes the following AI-driven predictive model:

- **Mid-Level Giving - How likely is each donor to give between $500 and $5000 cumulatively in the next 12 months?**

Generating leads for your mid-level giving program

1   **Identify the top-ranking donors most likely to become mid-level givers**

2   **Funnel the top donors into your 'one-to-few' mid-level journey each month**
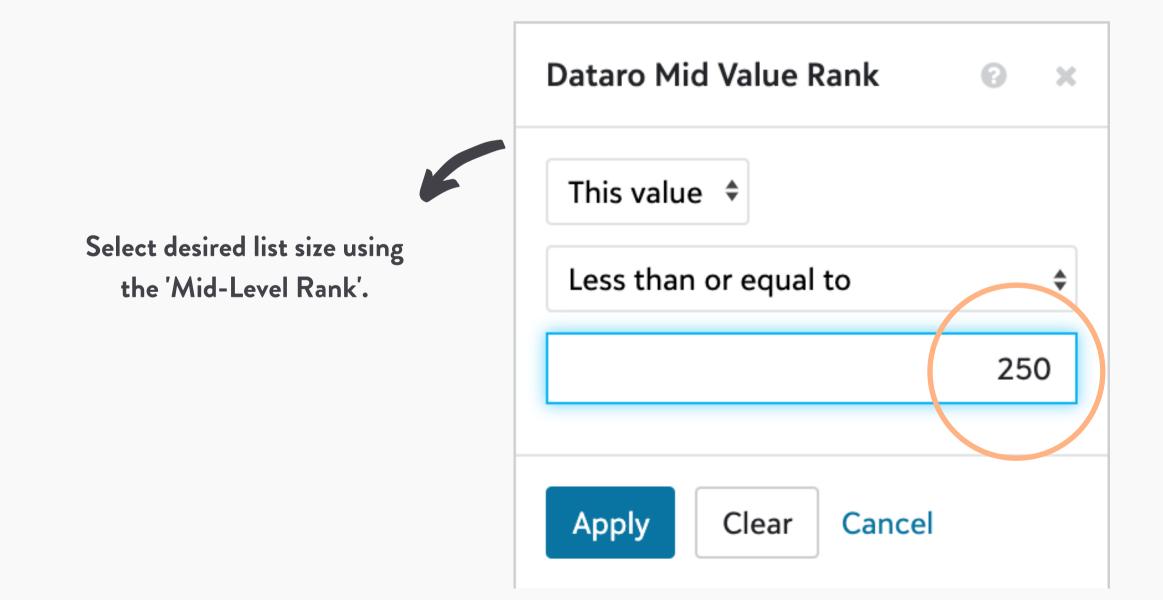
3   **Convert more donors and identify potential major givers**

1 Find the top-ranking potential mid-level givers

ᐯ ᐯ ᐯ

- Using the 'Dataro Mid-Level Rank' field, select the donors with a rank equal to less than your desired list size. E.g, if you want to add 250 donors to mid-level journeys each month, select all donors with a rank <=250

Select desired list size using the 'Mid-Level Rank'.

Dataro Mid Value Rank   ⊙   ✕

This value ⇕

Less than or equal to ⇕
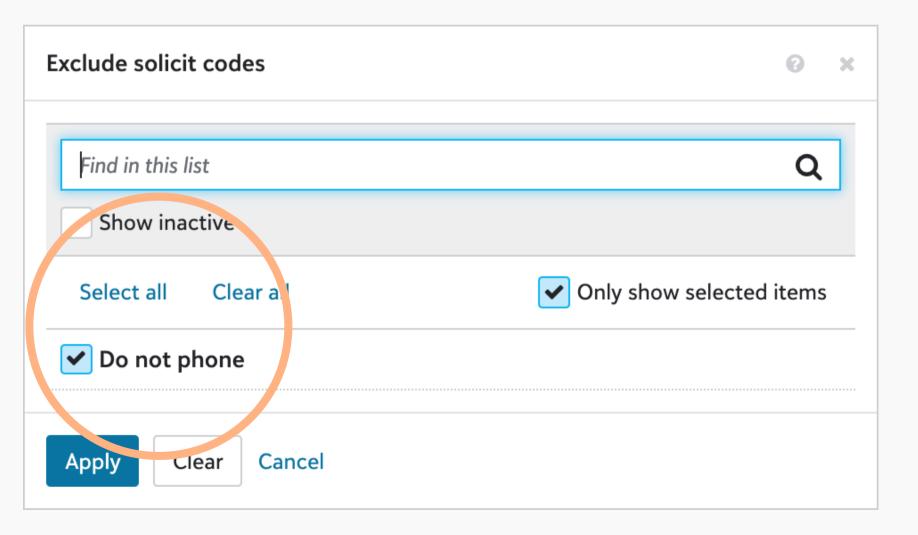
250

Apply   Clear   Cancel

2 Apply exclusions for donors you don't want to include

- There are certain exclusions you should apply. For instance, you may like to remove donors who were previously in the mid-level giving program, or who have opted out of communications.
- HINT: If exclusions reduce your campaign size too far, simply 'top up' the list by increasing the size of your query.

Apply recommended exclusions, plus any others you think are necessary

Exclude solicit codes

Find in this list

Show inactive

Select all   Clear all   ☑ Only show selected items

☑ Do not phone

Apply   Clear   Cancel

Example shows query in RE NXT

3   Tips for planning your rolling mid-level journeys

- With Dataro, you will be able to identify the top-ranked mid-level giving prospects. This will include donors who are already mid-level givers PLUS donors who have never given mid-level gifts before but who our modelling tells us are more likely to become mid-level givers.

- Mid-level prospects should be placed onto a special 'one-to-few' mid-level journey. Typically this will closely match their standard journey, but with a few extra touch points. You're an expert fundraiser, so we will let you decide exactly what this journey will look like! HINT: you may want different mid-level journeys for RG and cash givers.

- You need a way to keep track of these prospects. We suggest tagging mid-level giving prospects with a specific solicit code or donor tag. That way, after their mid-level prospecting journey is over (e.g. after 12 months), they will either remain in your mid-level program OR revert back down to the standard journey.

- Using this approach, you will have a regular cohort of new prospects on a journey to convert to mid-level. If they don't convert, you can remove them from the mid-level cohort and save costs from further mid-level outreach.

- If a donor is removed from the mid-level cohort because they didn't convert during the journey, we suggest setting up an exclusion so they are not eligible to be reselected for the mid-level program for the next 12 months.

Example shows query in RE NXT

Major Giving + Confirm Gift in Will

Goal: to identify the supporters most likely to give a major gift and confirm a gift in will

Includes two AI-driven predictive models:

- **Major Giving - How likely is a donor to give >$5000 cumulatively in the next 12 months**
- **Confirm Gift in Will: How likely is a donor to confirm that they will leave your organisation a gift in their will.**

Prioritise your prospect list and find new prospects in your database for your stewardship team
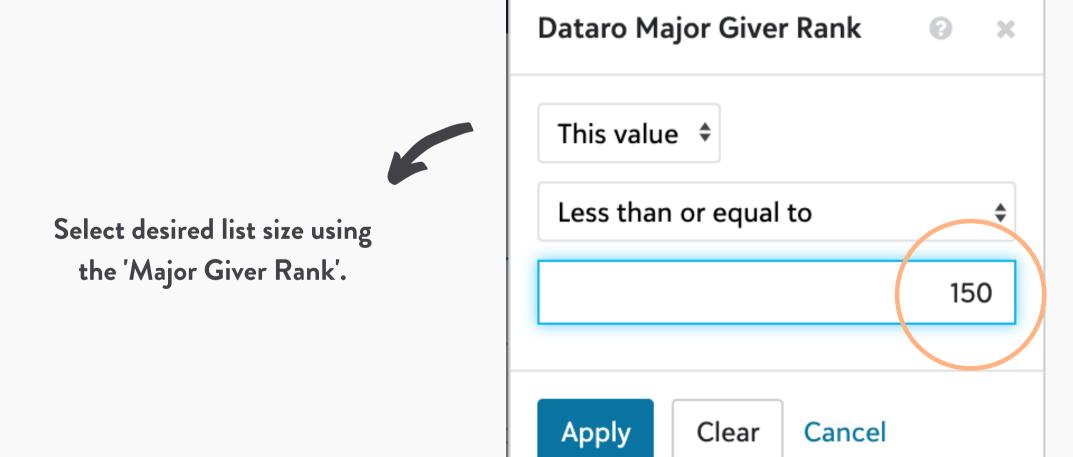
1 Identify the top-ranking donors

2 Cross-reference against your own metrics to identify top priority prospects

Stewardship Use Cases

- **Major gifts and gifts in will rely on strong relationships. AI-driven propensity scores can tell your stewardship team where to focus their prospect research efforts.**

- **Compare against your prospect list to find top priority prospects and find new ones!**

- **Refine lists for further investigation and research, such as wealth scans.**

1 Find the top-ranking potential Major or GIW prospects

- Using the 'Dataro Major Giver Rank' or 'Dataro Confirm Gift in Will Rank' field, select the donors with a rank equal to less than your desired list size. E.g, this query will select the top 150 Major Giver prospects.
- HINT: How many Major/GIW prospects are in your pipeline right now? Use this number to select your query size.
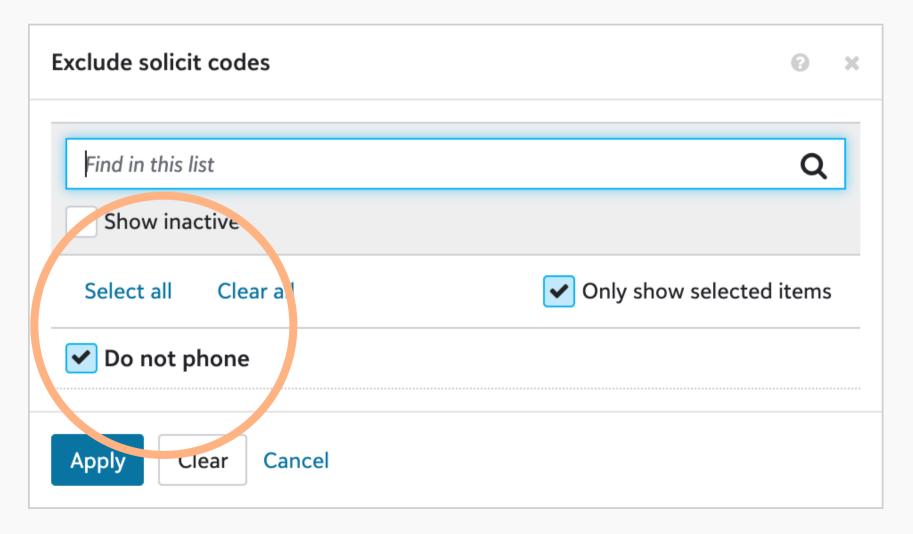
Select desired list size using the 'Major Giver Rank'.

2 **Apply exclusions for donors you don't want to include**

- There are certain exclusions you should apply. For instance, you may like to remove donors from the Major Giving selection if they are active potential legacy givers or have said they don't want to be contacted.
- HINT: If exclusions reduce your campaign size too far, simply 'top up' the list by increasing the size of your query.

Apply recommended
exclusions, plus any others
you think are necessary

Exclude solicit codes

Find in this list

Show inactive

Select all   Clear a'   ☑ Only show selected items

☑ Do not phone

Apply   Clear   Cancel

Example shows query in RE NXT

3 Tips for using Dataro's Major & Gift in Will rankings

- You will already have your own list of potential major/gift in will prospects - i.e. your pipeline!
- HINT: run a comparison to see how many of the top Dataro selections overlap with your own pipeline (or ask your data team to help you with this step). By doing so you will identify:
  - The prospects Dataro selected that you already know about - we've confirmed these are good prospects and it's a good idea to keep on building those relationships.
  - The 'extra' prospects Dataro has found in your database - you should start researching these highly ranked individuals because our modelling tells us they may give a major gift/confirm a gift in will! If they aren't on your radar already, you can plan and start your stewardship journey.
- Repeat this process as often as you like, but we recommend at least quarterly. In this way you will constantly be updating your pipeline with new prospects and making sure you're not missing potential high value donors!
- Log into the Dataro app to find new reports and insights into your major donors and legacy givers!

dataro

dataro.io

chris@dataro.io