

Assessing Your Readiness for a Mid-level Program

We believe there are several “keys to success” when launching and managing a mid-level program. Ensuring that you have all your systems and processes in place will allow your program to be grounded in a solid foundation and be designed to support the major gifts pipeline. This assessment will cover various areas that will help you and your organization understand your readiness to start a mid-level program and help you identify areas to focus on.

In the following sections, rate your organization 1-5 according to the following guide:

- 1 – No, we do or have **not**
- 2 – We do or have **a tiny bit**
- 3 – **Sometimes** we do or have
- 4 – We **mostly** do or have
- 5 – We **definitely** do or have.

There may be a question that is outside your knowledge. – it relates to an area in which you personally don't work, or perhaps you're new - rather than leaving an item blank, enter “3,” which is the average score.

Tally up each section as you go along. For Yes/No questions Yes = 5, No = 1. There is a final tally sheet on the last page.

Remember, the point of this document is to help you identify areas on which to work, focus, and discuss. And we are here to walk you through what you need to do for each of these categories. So, be honest with yourself, be open to where this assessment leads, and know that we've got your back!

Section A: Need for a Mid-Level Program

Before you start a mid-level program, it is important to assess your overall need. This will not only advise you on caseload needs, hiring, and areas of focus, but also instruct on potential timelines for implementation.

- 1 Do you currently have a Major Gifts Program? (Yes = 5, No = 1) _____
 - 2 Do you have an active, functioning direct response/annual giving? (Yes = 5, No = 1) _____
- Section A Total:** _____

Section B: Program Set-up

Getting the foundation right for a successful Mid-level program involves a lot of people, discussions, and components.

- 1 We have identified where the program will reside. For example, will it be part of the Fundraising or Direct Response department. _____
- 2 We have met cross-departmentally to understand *all* program expectations. _____
- 3 We have identified whose role it is to create touch points for mid-level. _____
- 4 We have developed Business Protocols to determine how the Mid-Level Officer should respond to common donor situations. _____
- 5 We have determined how a stewardship program will coordinate with mid-level to ensure donors are thanked quickly and identified early. _____
- 6 We have determined whether the Mid-Level Officer will have other responsibilities and/or will be meeting face-to-face with donors. _____
- 7 We have determined whether the Mid-level Officer will be asking for gifts. _____

Section B Total: _____

Section C: Data Systems

Understanding your data is paramount when developing a successful mid-level program. Without a clear understanding of certain areas, you are likely to come across obstacles and stumbling blocks that could have been avoided.

- 1 We have involved our Database Manager in the preparation of the mid-level program. _____
- 2 There is a clear understanding of assignments (assigned managers/solicitors) in your database _____
- 3 We have determined the possibility of storing a donor's tier within the database. _____
- 4 We have a clear way to identify deceased donors in the database. _____
- 5 We understand the solicit codes/exclusion codes/constituent codes in our database _____
- 6 We have identified which donors should be *excluded* from the mid-level program. _____
- 7 We have "clean" data that requires little attention before we start a program. _____
- 8 We have a database that is free from issues with duplicate records. _____
- 9 We can easily identify donors that have a phone and/or email connected with their record. _____

Section C Total _____

Section D: Evaluating the Donor Pool

A clear understanding of the available donors and your goals for the mid-level caseload is vital when launching a program. It will not only direct hiring decisions, but also help you to understand what you can expect in terms of size and capacity with this program.

- 1 We have criteria established for creating our mid-level donor pool. _____
- 2 We have identified our target giving range for the donor pool. _____
- 3 We have determined our target donor count for the final mid-level caseload. _____
- 4 We have determined whether there are donors that can move from the major gifts team to the mid-level caseload. _____

Section D Total _____

Section E: Evaluation and Metrics

Knowing how to correctly and efficiently track and report on your program will help you to have a firm grasp on your progress. Ideally, this information will be built into your database

- 1 We can tack actions in your database. _____
- 2 We can differentiate between mass actions and individual donor actions. In other words, we can distinguish an action that is an email sent to 500 donors versus an email exchange between a single donor and the gift officer. _____
- 3 We can track mid-level donors after they move out of mid-level, back to Direct Marketing only. _____
- 4 We can track mid-level donors after they move out of mid-level to Major Gifts _____
- 5 We can determine overall giving by mid-level caseload *plus* the revenue from donors moved to Major Gifts. _____
- 6 We can easily create and export reports weekly and monthly to show recent giving as well as year-to-date giving totals. _____

Section E Total _____

Section F: Systems for Successful Implementation

Getting the right systems, structure, and collateral materials in place is a key component for successful implementation of the mid-level program.

- 1 In collaboration with Major Gifts, we have established a system to move donors from mid-level to Major Gifts, including triggers. _____
- 2 We have a transition plan in place for a warm hand-off between mid-level and Major Gifts. _____
- 3 We have determined what how to respond when a donor wants to give. For example, whether the Mid-Level Officer will process the gift or transfer the donor to another staff person. _____
- 4 We have identified the necessary collateral materials the Mid-Level Officer will need. _____
- 5 We have created the necessary collateral materials the Mid-Level Officer will need. _____
- 6 We have identified touch points that can be used in the mid-level program. _____
- 7 We have created touch points that can be used in the mid-level program. _____

Section F Total _____

Your Score

Total up all the numbers you assigned in your answers to each question:

Section	Score
A	<hr/>
B	<hr/>
C	<hr/>
D	<hr/>
E	<hr/>
F	<hr/>
Total:	<hr/>

How did you do? Let these categories be your guide:

- ☐ 35 to 69 Nowhere to go but up!
- ☐ 70-104 You're on the right track; look at specific areas to improve.
- ☐ 105 to 139 Things are looking good – you are almost there.
- ☐ 140 to 175 Amazing! Your organization is ready to rock and roll the mid-level program!

Possible Answers: 35

Top score: 175

After determining your overall score, examine each section. In which general areas (section A-F) is your organization doing well? And, in which general area(s) are there action items that will help prepare your organization for a mid-level program?

Now, dive deeper into each section (A-F). What are specific points for potential action? With whom can you discuss these outcomes, as well as ideas for improvement?

Finally, don't panic! A lot of preparation goes into a good mid-level program. We suggest that you anticipate it will take 4-6 months to prepare, depending on your organization and the data.