



VERITUS
GROUP

Building Authentic Donor Relationships

How to Double Your Major Donors



VERITUS GROUP

Jeff Schreifels

- Principal
 - More than 32 years in developing, planning and executing strategic fundraising and marketing programs
 - Served as Development Director at several non-profits
 - Senior Strategy Director at The Domain Group, where he helped to develop record-setting fundraising programs for the agency's largest clients.
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VERITUS GROUP

Lisa Robertson

- More than 30 years of nonprofit leadership experience.
 - At Veritus for nine years, coaching fundraisers around the country
 - Passionate about adult learning and training
 - Avid college football fan/Washington alum
-





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We are passionately donor-centered and grounded in a data-driven approach to mid, major, and planned giving.





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Our Strategy and Approach

The Veritus Way is based on years of work with non-profits of varying size and purpose. It's been developed with insight from:

- Analysis of millions of donor records
- Hundreds of consulting clients
- Thousands of Veritus Group Academy participants
- Work with thousands of fundraisers and non-profit leaders



Who We've Partnered With



**Yes, you CAN dramatically
increase the number of
donors moving to major
gifts...**



Our Promise

If you follow our advice today, you'll move more donors up the pipeline and into major gifts, improve retention of your mid and major donors, and better serve the donors who support your organization.

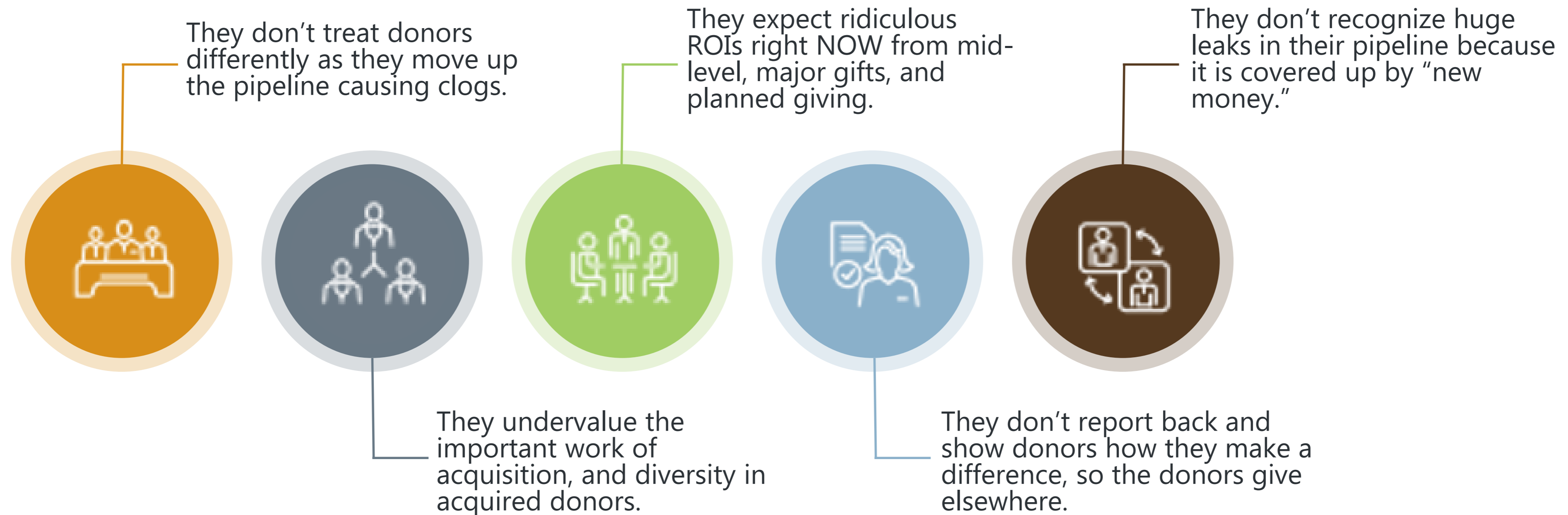


A photograph of two men in an office setting. The man on the left has blonde hair, wears glasses, and a checkered shirt. He is pointing at a laptop screen with a pen. The man on the right is balding, smiling, and wearing a grey blazer. They are sitting at a desk with two laptops, a smartphone, and a coffee cup. In the background, there is a large window with several panes, some of which have papers or sticky notes attached. A small potted plant is on the windowsill to the right. The entire image has a warm, golden-brown color cast.

What Non-Profits Get Wrong



What Non-Profits Get Wrong



A woman with long brown hair, wearing a yellow cardigan over a striped shirt, is pointing at a whiteboard with a red marker. A man with a beard, wearing a dark suit jacket over a light blue shirt, is looking at the whiteboard. The whiteboard is covered with numerous colorful sticky notes in shades of yellow, orange, green, and pink. The background shows a blurred office environment with wooden paneling and a door.

**“It’s Hard to Find New
Major Donors.”**



Misconceptions About Major Donors



I must find wealthy people and convince them to support your cause.



I need to focus on the donors with the highest wealth screening.



I need to prioritize donors who have given the largest gifts, not those who have given most recently.



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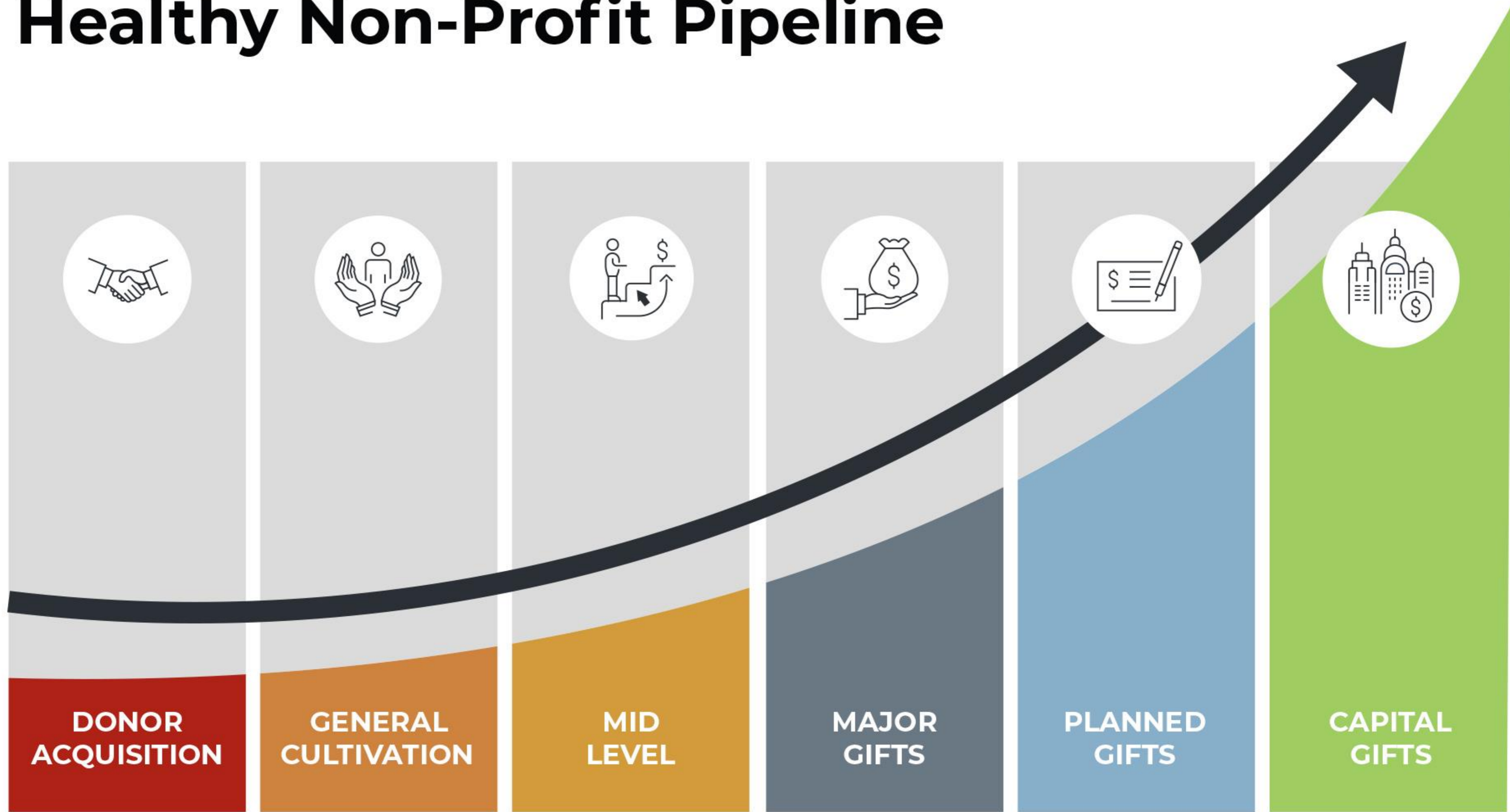
Prospecting

- Leads to unqualified caseloads
- Hurts relationships with donors who are *actually* passionate about your cause
- Causing MGOs to leave the profession
- Ultimately hurting the industry





Healthy Non-Profit Pipeline



ROI:

0.5

3:1-4:1

4:1-6:1

4:1-12:1

Varies

10:1-20:1

Understanding the Donor Pipeline



Donor Acquisition

Acquisition

- Expect a return of .5-75
 - You must be diverse in your acquisition efforts to create a diverse donor base at all levels of the pipeline
-

Understanding the Donor Pipeline



Cultivation

Cultivation

- Expect a return of 3:1 to 4:1
 - Managed by direct response
 - One-to-many relationships
-

Understanding the Donor Pipeline



Mid-level

Mid-Level

- Expect a return of 4:1 to 6:1
 - One-to-some relationships
 - Some level of personalization and specific touch point plans by tier
 - Caseload size: 500-700
-

Understanding the Donor Pipeline



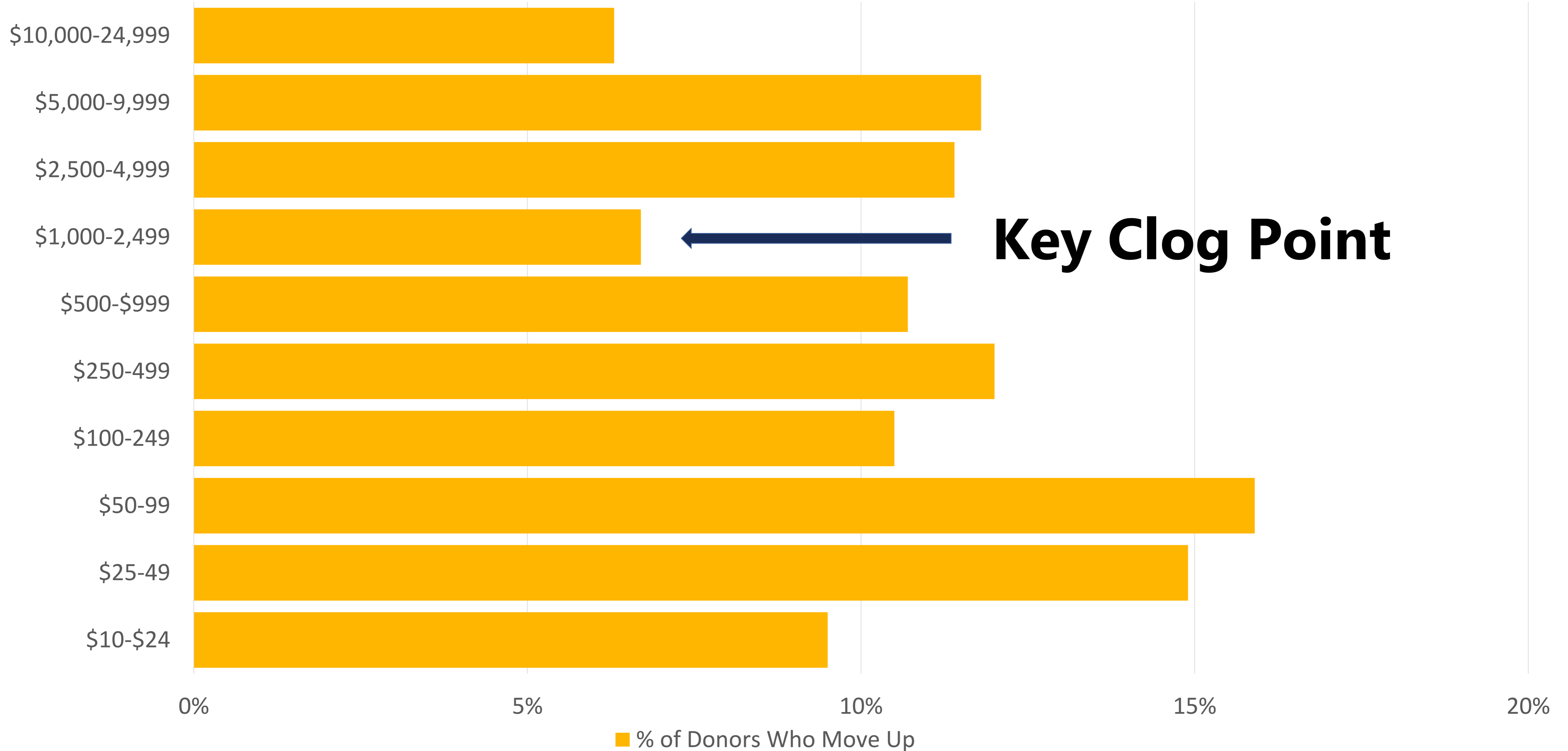
Major Gifts

Major Gifts

- Expect a return of 4:1 to 12:1
 - One-to-one relationships
 - Caseload size: 150
 - Focus on creating individual donor plans, strategies, and goals
 - Commit to identifying the donor's passions and interests, and creating a plan with that at the center
-



Mid-Level Donor Clogs






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Your best major donor prospects are donors who are **already giving to you.**

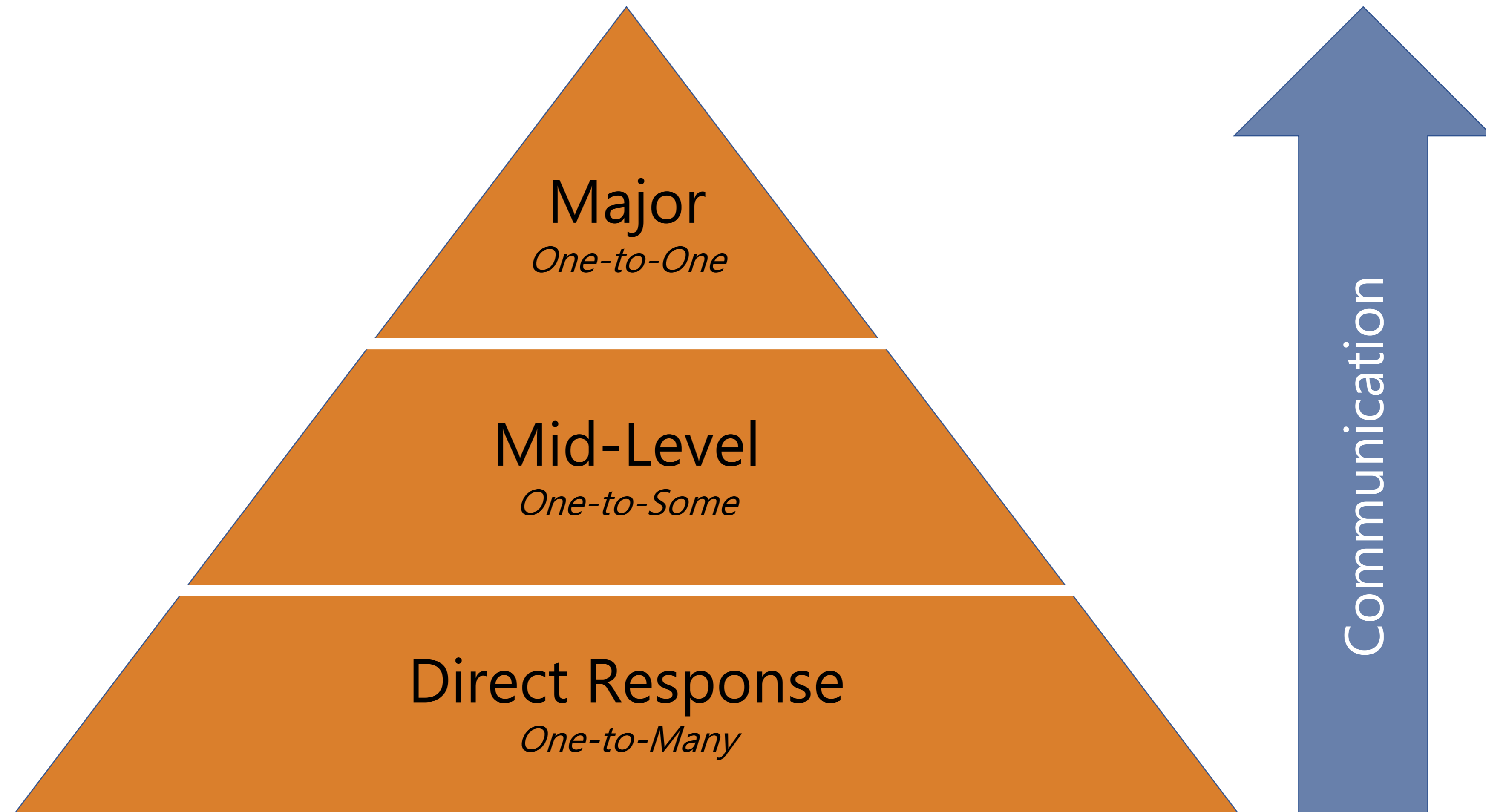


A woman with blonde hair and glasses is speaking in a meeting. She is wearing a light blue blazer and has her hands raised as if gesturing. In the background, another woman is visible, looking towards the speaker. The scene is set around a wooden table with a smartphone, a notebook, and a coffee cup. The overall lighting is warm and soft.

“I Don’t Know What to Do With Donors Before They Become ‘Major’...”



Levels of Individualized Communication





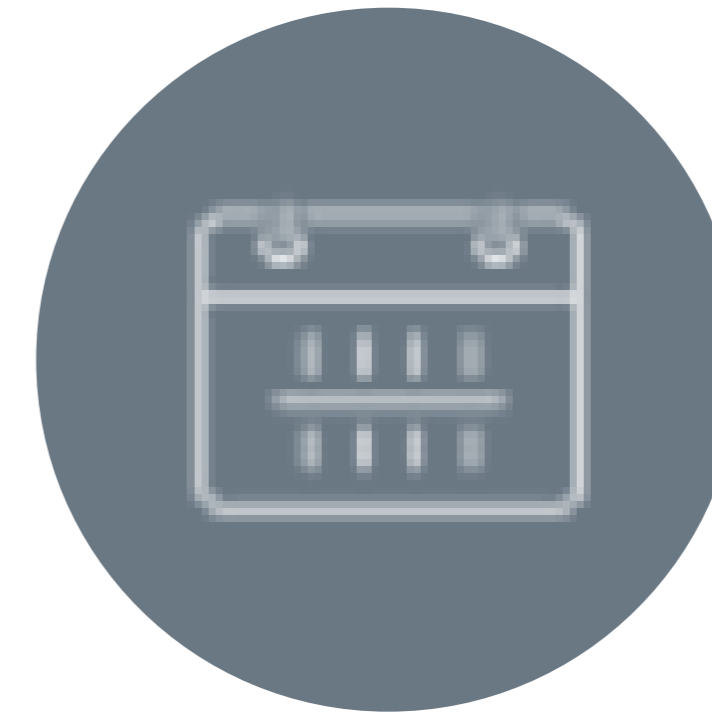
The Structure of Mid-Level Programs



A Mid-level Officer is working to develop meaningful relationships with a caseload of donors.



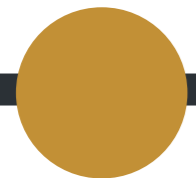
This caseload (of 500-700 donors) is tiered.



There is a 12-month communication plan attributed to the mid-level caseload that is layered *on top of* your Direct Response program



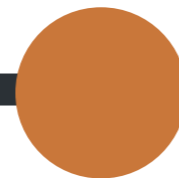
Donor Introduction Series



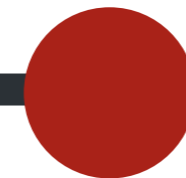
Introductory
Letter



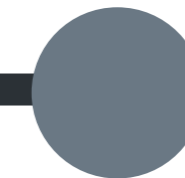
Introductory
Follow-Up
Attempts



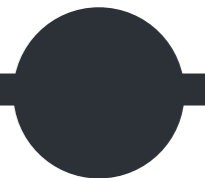
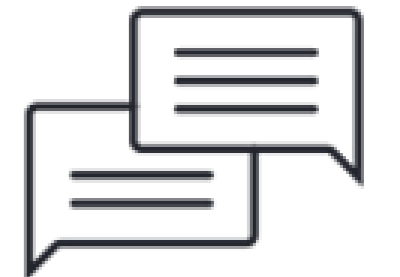
Touch Point Email



Survey – often
around month 5
or 6



Survey
Follow-Up
Attempts



Touch Point Story



Setting Expectations



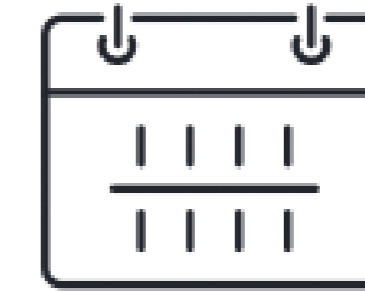
1 in 3

will say **YES**



1 in 3

will **not respond**



1 in 3

(over time)
will say **NO**



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Tiering Your Donors

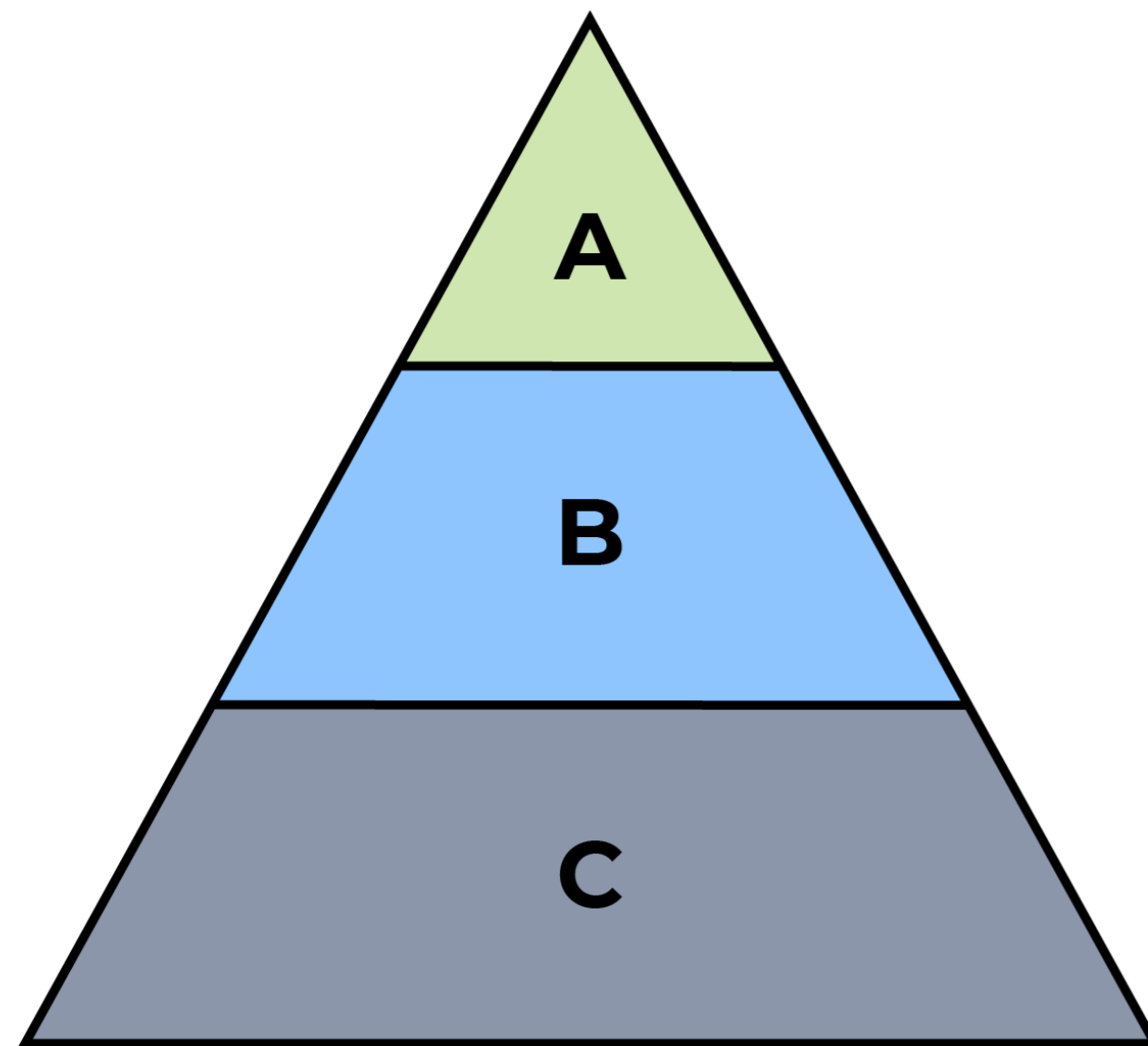
- Initial tiering is based primarily on revenue from current or previous year
 - Tier A – fewest donors, highest personalization and time spend
 - Tiers are fluid and should be adjusted as you learn more about donors
-





Tiering Your Donors

Caseload Mix



Levels of Donors	Revenue	Strategy/Messaging	Focus
A	15%	Very Strategic Personal Moves	<ul style="list-style-type: none">• Move qualified donors to major gifts• Identify donor's passions and interests• Increase net revenue and improve retention
B	25%		<ul style="list-style-type: none">• Top donors moved into Tier A• Increase net revenue and improve retention• Building authentic relationships and sharing donor impact
C	60%	Less Tactical Personal Moves	<ul style="list-style-type: none">• Building authentic relationships and sharing donor impact• Increase net revenue and improve retention

Top Revenue Producing Donors

Medium Revenue Producing Donors

Average Revenue Producing Donors



Creating a Plan

Tier	Thank You for Gift		Phone Touch Point Protocol	90 Days	60 Days	90 Days	60 Days	90 Days
	Call	Note						
A	24-48 hrs	3 days	3-4 attempts over 60 day calling period	Personalized Intro Letter & Call	Email Touch on a Program or Service	USPS Survey & Phone follow up	Email Touch on a Program or Service	Solicitation Calls tied to Direct Response Theme
Method	Phone	USPS		USPS/Phone/Email	Email	USPS / Phone	Email	Phone
B	48-60 hrs	4 days	2-3 attempts over 60 day calling period	Personalized Intro Letter & Call	Email Touch on a Program or Service	USPS Survey & Phone follow up	Email Touch on a Program or Service	Solicitation Calls tied to Direct Response Theme
Method	Phone	USPS		USPS/Phone/Email	Email	USPS / Phone	Email	Phone
C	Within 1 week	Within 1 week	2 attempts over 60 day calling period	Intro Letter & Call	Email Touch on a Program or Service	USPS Survey & Phone follow up	Email Touch on a Program or Service	Solicitation Calls tied to Direct Response Theme
Method	Phone	USPS		USPS/Phone/Email	Email	USPS / Phone	Email	Phone



Developing Touch Points

Types

- Problem or Gap
- Ask
- Thanks
- YMAD
- Personal Connections

You Made a Difference

- Impact Reports
- Project Reports
- Transformation Stories
- Insider Memo
- Subject Matter Expert/
External Validation
- Anecdotal Information or Reports

A group of business professionals in a meeting. In the background, a woman with glasses is laughing. In the foreground, a man is looking at a laptop. The scene is lit with warm, golden light.

“Mid-Level Programs Just Aren’t Worth It.”



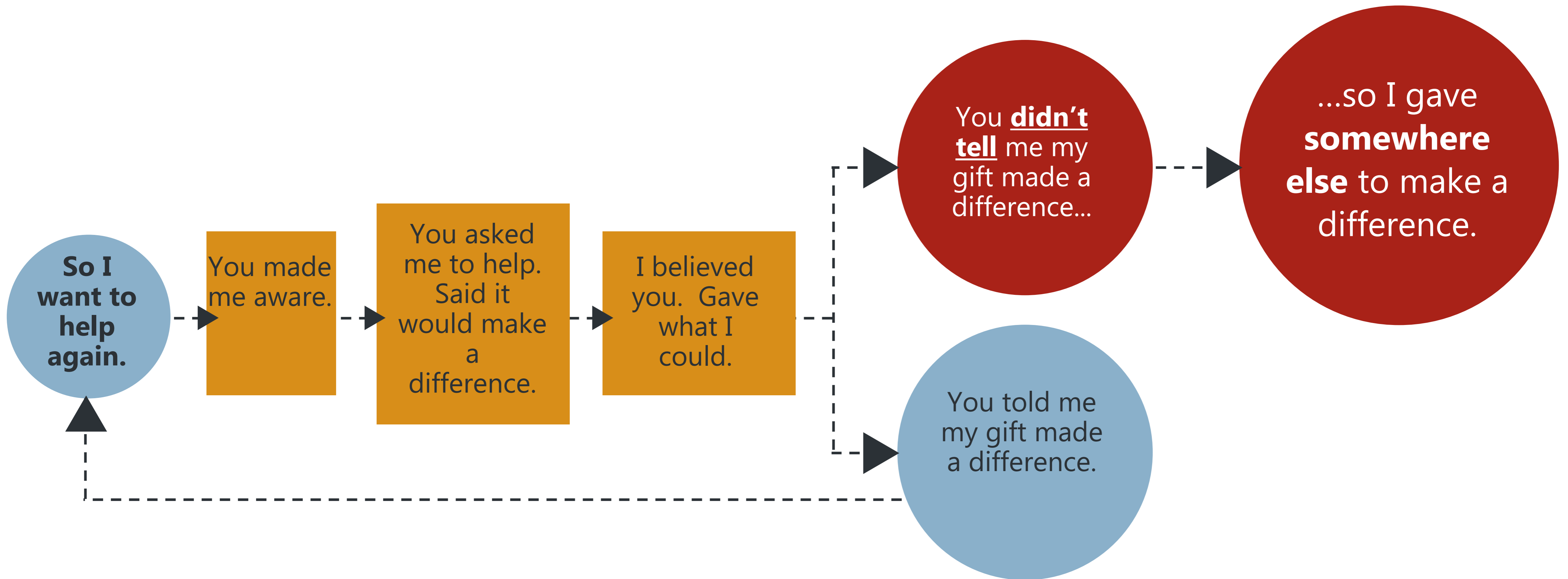
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Without a mid-level program there is no bridge between direct response and major gifts.





Very simply put...**This is how we lose our donors.**





The Importance of Mid-Level

Reasons to start, develop, and grow your mid-level program

Mid-level donors
are some of your
most loyal

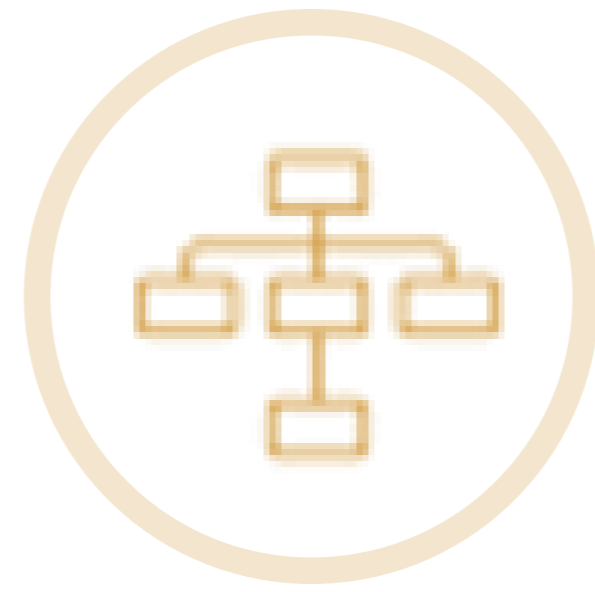
Mid-level donors
usually bring in the
majority of your NET
revenue

Mid-level donors are
your future Major
Donors

Investing in mid-
level programs can
help you retain
thousands, even
millions, of dollars



What We've Learned



Our data analysis has shown that organizations without a mid-level program promote 0.2-1.2% to major gifts while those that do move 3-3.5% to major gifts.



Does Mid-Level Really Work?

When we look at the results from our clients, we can clearly see that a focused mid-level program with a dedicated Mid-Level Officer yields ongoing, impactful results.

Average Revenue Growth from Year 1 to Year 3





The Difference in a Mid-Level Program

When you have a mid-level program, you are giving the donor a glimpse into what a deeper relationship looks like.

Focus on the donor's passions and interests

Identify if the donor wants a deeper relationship

Improve retention by caring about your donors

More directly tie the donor's giving to their impact

If we had a way to teach you how to double your major donors, how many of you would be interested?



Veritus Group Academy



Course Begins: October 31, 2022

Certification Course in Mid-Level Fundraising

Learning Approach: Online course you can do anywhere anytime, 8 Modules, Video and Audio Trainings, Readings, Application Assignments, Peer Calls, Integration Plan

Opportunity: Learn how to transform your approach to mid-level donors to strengthen your pipeline and raise more revenue for your mission.

CFRE: Upon completion, you'll earn 36 Credit Hours

Covers: Philosophy, Fundamentals of a successful mid-level program, Hiring and retaining the right MLO, Critical data systems, Mid-Level Qualification, Asking for gifts, Permission-Based Asking™ Model, Touch Point Plans, Transitioning donors to major gifts, Evaluation and reporting

To Sign Up: Go to www.veritusgroup.com/training



Our Upcoming Course for Fundraisers – starts October 31

- ① Learn how to create, grow, and develop a successful mid-level program that will produce a strong ROI and strengthen your donor pipeline.
- ② Learn how to create a structure and system for your Mid-Level Officer that will allow them to create meaningful touch points, qualify donors, and smoothly promote those donors to the major gifts program.
- ③ Learn everything you need to know about managing a successful mid-level program that will serve your donors.



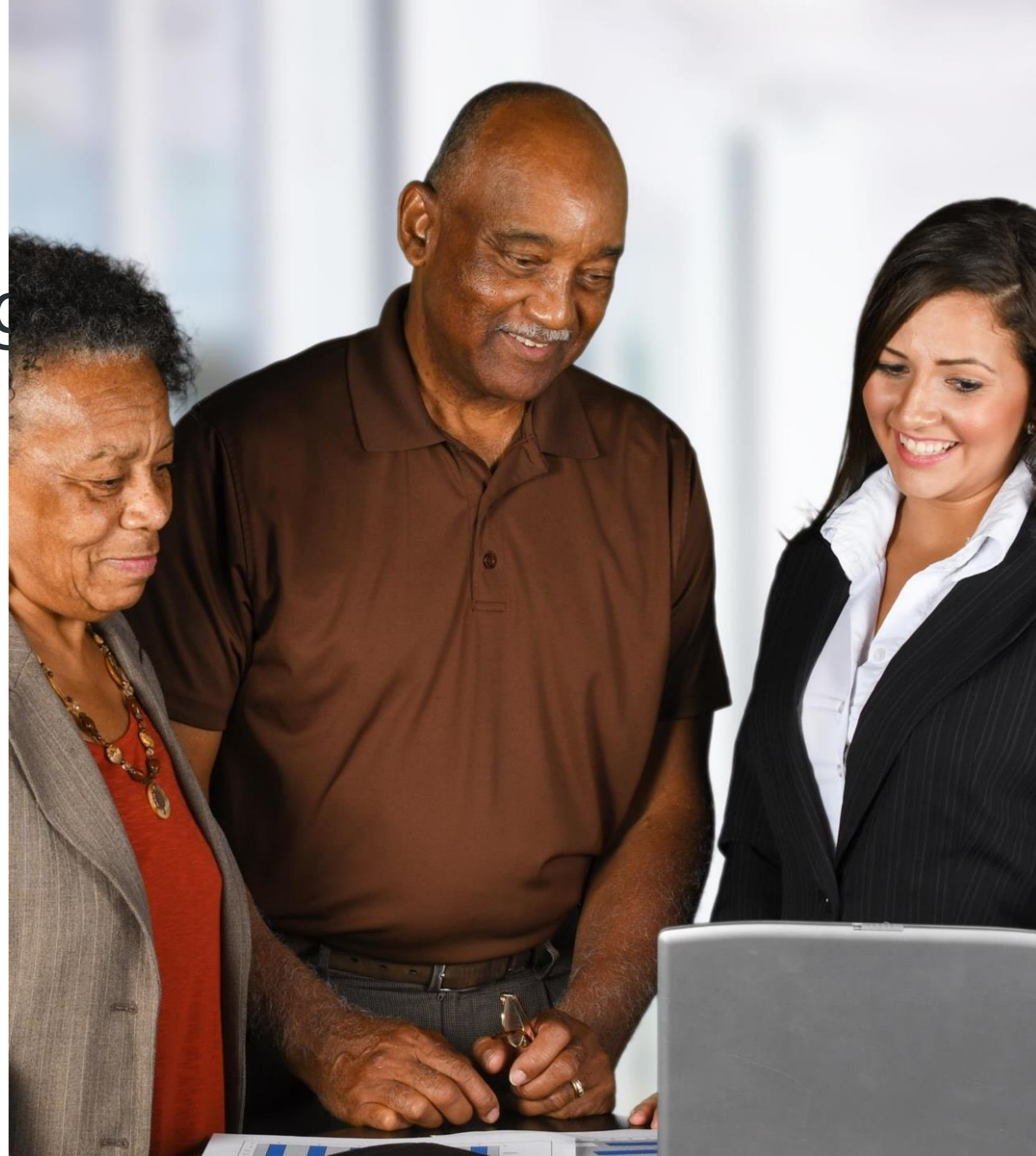
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\$16,750 Worth of Training Material

- 8 Hours of Recorded Media
- Over 250 Pages of Reading Materials and Resources
- 4 Hours of Live Calls with Veritus Experts
- Comprehensive training on creating and growing a mid-level program
- 36 CFRE Credits

Your Cost: \$1,797

Get 10% off (\$200) the regular price of \$1,997 when you sign up by next Friday



"When you complete Veritus' Mid-Level Fundraising course, you'll walk away with a process, materials and a concrete plan to match your donors' interests and passions with your organization. I've worked in development for 10+ years, and I really appreciate having a process in place that has been proven to be successful."

**Beth Frear
Manager, Sustained Giving & Legacy Gifts
The Foundation for Ellis Medicine**

Get \$200 Off!

Coupon Code: OCT22ML200

<https://veritusgroup.com/courses/certification-course-in-mid-level-fundraising/>

A woman with long dark hair, wearing a blue and white striped button-down shirt, is standing and talking to a man. The man is seen from the back, wearing a dark brown or maroon shirt. They are in an office environment with desks, papers, and a window in the background. The lighting is warm and soft. The word "Questions" is overlaid in large white font across the center of the image.

Questions

Get \$200 Off!

Coupon Code: OCT22ML200

<https://veritusgroup.com/courses/certification-course-in-mid-level-fundraising/>



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