



Audience Profile

The Mid-Level Donor

Mid-level donors continue to be a crucial segment of your donor base, positioned between annual fund contributors and major donors. They represent an important source of steady income, thanks to their loyal behaviors and proven commitment to your institution. With shifting donor behaviors and economic pressures, it is more important than ever to use data-driven segmentation to optimize their engagement. Mid-level donors tend to stay engaged for the long term and often look for ways to contribute beyond their monetary gifts. Now is the time to re-evaluate your approach to mid-level donor cultivation and ensure your strategies align with their evolving expectations and the changing landscape of advancement.



EAB defines **mid-level donors** as a segment to support more tailored engagement. Remember to avoid referring to donors as "mid-level" in communications; instead, focus on personalized messaging that reflects their interests and giving history.

Demographics and Psychographics

\$90 trillion

Estimated wealth to be inherited by Millennials through 2044

69% Have a net worth over \$1 million

53% Have been giving for 10+ years

64% Have graduate degrees

59% Identify as female

Source: Sea Change Strategies and Edge Research, The Missing Middle Part 4, 2023; Anna Bahney, "Millennials stand to become the richest generation in history, after \$90 trillion wealth transfer," *CNN*, March 1, 2024.

Engagement Recommendations

Recent shifts show that mid-level donors increasingly want deeper and more meaningful connections with the organizations they support. They respond well to direct outreach tactics, like phone calls, handwritten notes, or even personalized videos. They also appreciate when mass campaigns include elements that recognize their relationship with the institution. By treating mid-level donors as investors in your mission and using their engagement data to tailor outreach, you can create an experience that is both impactful and engaging. Provide unique opportunities for them to participate, such as exclusive campus events or small-group discussions with institutional leaders. These meaningful interactions help build trust and cultivate long-term loyalty.



Personalized touchpoints



Exclusive events



High-impact messaging



Consistent stewardship

Action Steps



Re-Examine Mid-Level Giving At Your Institution

Refine existing segmentation using new data points (average gift size, giving frequency, wealth score, etc.) to better target mid-level donors and identify those with potential for growth.



Map Out a 6-Month Engagement Plan

Develop a strategy that includes testing new personalized messaging tactics or leveraging data to determine which mid-level donors are ready for an upgrade campaign.



Set New Success Metrics

Go beyond traditional metrics like retention rates. Use advanced metrics such as donor engagement scores or predictive upgrade likelihood to evaluate mid-level donor success.