

Wake Up the Sleeping Donors in Your CRM: Unlocking Major Gifts Through Stewardship

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- WUCF is Central Florida's **PBS and 24/7 jazz radio station** for more than **5 million people across 9 Central Florida counties**
- Previous affiliation with a local public media station **created brand confusion**
- Major Giving accounts for less than **1% of our donor file**
- Lean development staff team
- Lost **2.5 million in annual Federal and State funding** in 2025, plus additional **\$1 million** cuts from University starting in FY2027



- Over **80% of members** have activated their member benefit. Nearly **60% are actively streaming**.
- Demand for WUCF Passport drives our **average gift size amount down**

WHO WE ARE:



Catapult is a trusted full-service fundraising consulting firm. We have helped countless non-profits launch donor relationships and maximize their revenue while minimizing their investment!

WHAT WE DO:



**CAPITAL CAMPAIGN
CONSULTING**



**CAPACITY
BUILDING**



**MAJOR GIFT
INITIATIVES**



PROSPECT RESEARCH



**PLANNED GIVING
PROGRAMS**



**MID-LEVEL DONOR
CALLING PROGRAMS**



**ANNUAL FUND
CALLING**



**CAMPAIGN WRAP-
UP CALLING**



**PLANNED GIVING -
LEGACY CALL
PROGRAMS**





Use your phone
to scan and
download the
checklist,
worksheet,
and slides

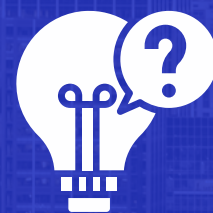


Why Mid-Level Donors?



Power

What is the power of mid-level donor fundraising?



Challenges

What challenges can arise when developing a segment of the donor database?



Momentum

What is the importance of sustained fundraising momentum with mid-level donors?



Goals

How do you continue to strengthen and retain your base of support, all while investing in donor relationships?

Mid-Level Donors: Relationship Strategy

- Build long-term donor loyalty through intentional engagement
- Create future major, campaign, and planned giving opportunities
- Increase donor confidence in your mission and leadership



Identifying Mid-Level Donors

- What are the existing giving thresholds at your organization?
- Is giving transactional or philanthropic? For WUCF, there's a big difference!
- Is the donor active or lapsed? Do they give annually or monthly? **Clearly define your segments before moving forward.**



Giving Thresholds

Donor Behavior

Affinity

Loyalty

Giving Patterns

Premiums



Case Study: WUCF Results

2025

- 1,617 donors in partnership scope
- 506 donors engaged
- 230 pledges made over the phone
- 45% pledge rate
- **\$644 average pledge = \$148,112 raised**

2026

Focusing on:

- Stewardship - Resilience Circle Donors
- Renewal Gifts
- Mid-Level donor prospects





MID LEVEL TO MAJOR DONOR CULTIVATION & STEWARDSHIP

A successful mid-level donor strategy creates intentional opportunities to **deepen donor relationships** before a donor ever enters a major gift portfolio.

The framework emphasizes intentional **donor experiences** that strengthen loyalty, deepen engagement, and increase philanthropic readiness.

FROM MID LEVEL TO MAJOR DONOR

8 STEP PLAN

- 01 **IDENTIFY YOUR BEST DONOR PROSPECTS** - Use donor behavior and giving patterns to identify loyal supporters with greater philanthropic potential.
- 02 **REVIEW AND PRIORITIZE YOUR DONOR LIST** - Segment and prioritize donors for personalized outreach and relationship development.
- 03 **SEND A LETTER OF INTRODUCTION** - Begin the relationship with personalized outreach that reinforces donor impact and appreciation.

FROM MID LEVEL TO MAJOR DONOR

8 STEP PLAN

- 04 **HAVE AN AREA OF IMPACT CONVERSATION** - Learn what inspires donor support through meaningful and relationship-focused conversations.
- 05 **SEND A PRE-ASK IMPACT LETTER** - Share mission impact and prepare donors for a deeper philanthropic conversation.
- 06 **MAKE THE INVITATION TO GIVE** - Invite donors to increase their support through a personalized and donor-centered ask.

FROM MID LEVEL TO MAJOR DONOR

8 STEP PLAN

- 07 **FULFILL, RECOGNIZE, AND REPORT** - Promptly process gifts, recognize donors, and consistently measure donor engagement and responsiveness.
- 08 **STAY CONNECTED AND DEEPEN RELATIONSHIPS** - Strengthen donor loyalty through intentional year-round stewardship and touchpoints.

TOUCHPOINTS

Meaningful donor
experiences strengthen
loyalty, retention, and
long-term giving.



THE RULE OF 7*

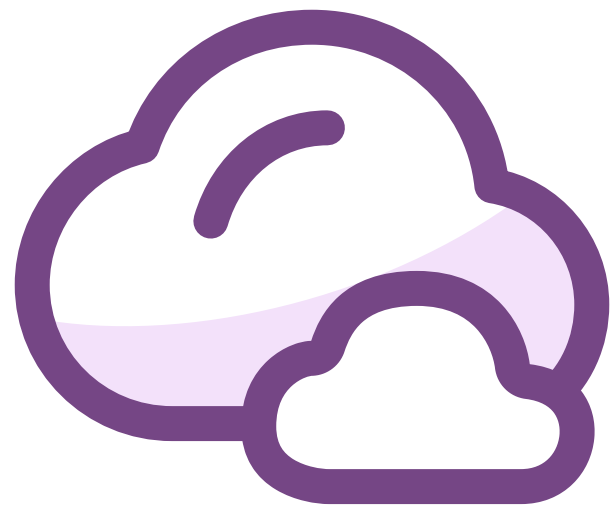


Connect with donors and potential donors seven times during the year

Builds confidence in your organization's mission and leadership

Most donors require seven touchpoints before they act

Consistency builds trust



Donor Stewardship & Engagement Examples

Creating Meaningful Donor Experiences

**Stay connected with donors who have confirmed and pledged gift intentions.
Some of the meaningful points of contact can include:**

Special Occasion Call

**Thank You Call – Learn the
Donors “Why”**

**Schedule Digital Voicemail
from staff or volunteer**

**Giving Society welcome call
and renewing appreciation call**

Set-up one-on-one appointments

**Cumulative Giving & Long Loyal
appreciation call**

LinkedIn Engagement

Discuss IRA / DAF / Stock Swap

Program and Impact Reports



STEWARDSHIP EVENT: Strategy with Heart

- Create **personal, mission-focused** experiences
- Use events to **deepen relationships**, not just thank donors
- Small moments create **lasting loyalty** (RSVP calls, name tags, follow-ups)
- Plan **follow-up** before the event starts
- Every event is a touchpoint that **builds loyalty**

Stewardship in Action

 What happens when
organizations intentionally
invest in donor relationships?



**Meeting donors where they are
in their philanthropic journey.**

**Reactivate: donors with an MRC of \$500 in
the last 23+ months.**

**Renewal: donors with an MRC of \$1,000 in
the last 12 months.**

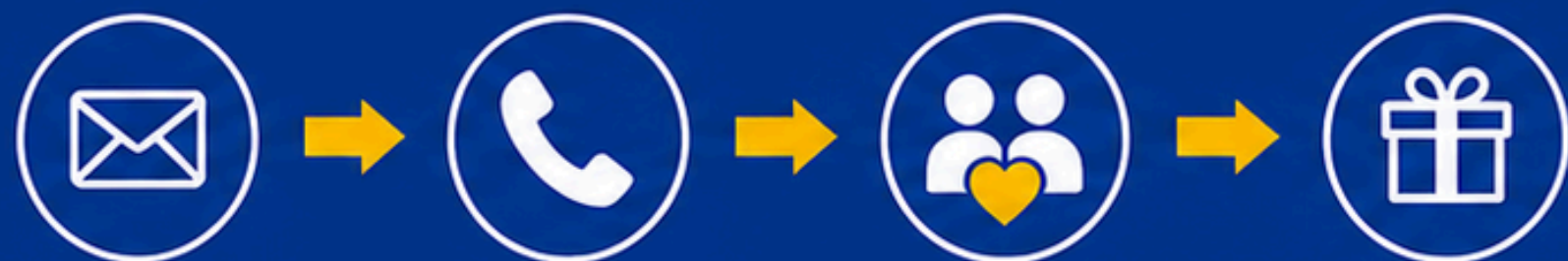
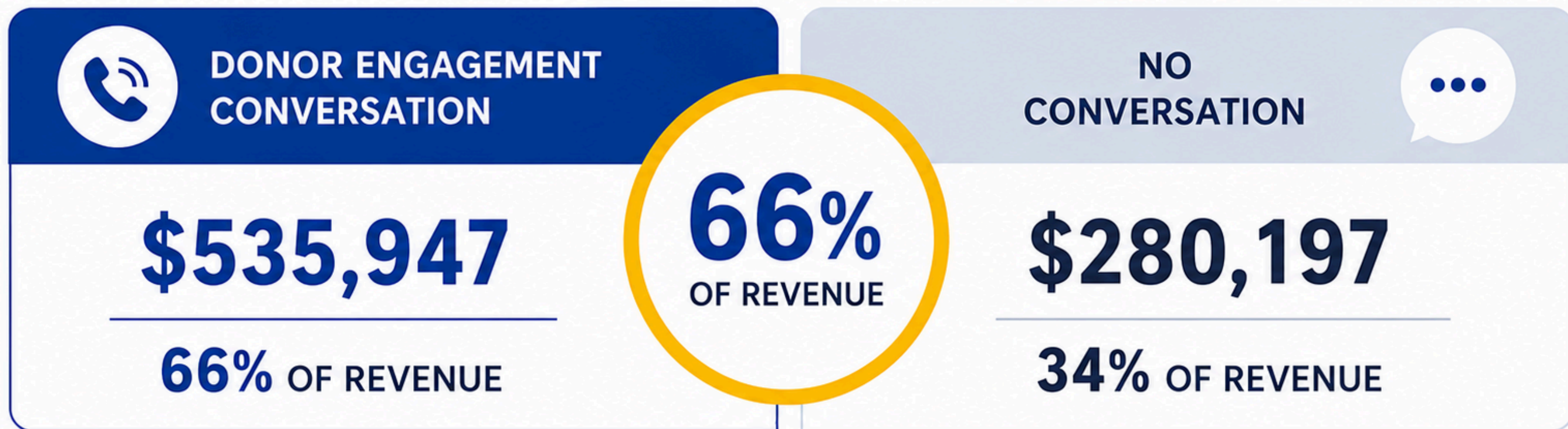
**Upgrade: current donors giving less than
\$2,500, but with a higher giving capacity.**

Case Study #1



POWER OF THE CALL

Two-thirds of revenue came from donors who participated in a donor engagement conversation.



Donors who experience a personal conversation generate nearly twice the revenue of donors who do not.

RESULTS

The donors in the reactivate campaign had a **32%** higher response rate.

The donors in the renewal campaign had a higher average gift.

- **57%** qualified for additional stewardship

The donors in the upgrade campaign had both a higher response rate and a higher average gift.

- **9%** qualified for a MG appointment

Selected donors with a lifetime philanthropic giving value was less than \$350.

Identified supporters whose giving history did not yet reflect their capacity.

Case Study

#2



The Strategy

Audience Selected: 2,067

- Discover why donors connect with the mission
- Increase understanding of organizational impact
- Enhance the donor experience through added value
- Reinforce the importance of philanthropic support



THE RESULTS

**1,026 engaged donors, 467
new gifts, +72% in giving**

**Average gift size increase
between 61% - 135%
(based on segment)**

**\$2,390 average non-
donor 1st time gift**



Scan to download

- 8-step checklist
- Stewardship Worksheet
- Presentation Slides



Creating a Mid-Level Donor Engagement Experience

Gratitude	Responsibility	Approval	Time Frame	Delivery Method

Your Commitment

Know your donors...and make sure they know you!

Ongoing cultivation and stewardship

Multi-channel approach

Educate your organization on phone, email, and social media etiquette

Commit to your strategy - invest, test, and measure results



THANK YOU



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