

**ActionAid**, The Actors' Benevolent Fund, Age Concern, Allergy UK, Alzheimer's Society, Amnesty International, The Army Benevolent Fund, The Art Fund, Arthritis Care, Asperger's Syndrome Foundation, Association for Post Natal Illness, Asthma UK, Barnardo's, Battersea Dogs and Cats Home, British Heart Foundation, The Bible Society, Botanical Society of the British Isles, Botton Village, Breakthrough Breast Cancer, The Brook Hospital for Animals, Barristers' Benevolent Association, Christian Aid, TearFund, CAFOD, **CARE International UK**, Care of the Elderly, The Osteopathic Centre for Children, Centrepoint, Cheer Trust, Friends of Chernobyl's Children, **ChildLine**, Children with Leukaemia, Christians Aware, The Local Church, Clic Sergeant, Concern, Covent Garden Opera House, Crisis, **Cancer Research UK**, EDHI Foundation, Edinburgh Health Centre, Ethiopiaid, FARM-Africa, Fight For Sight, Friends of the Earth, Friends of Peru, Stonewall, Greenpeace, Great Ormond Street Hospital for Children, Guide Dogs for the Blind, Help the Aged, The Local Hospice, International Cancer Research, International Fund for Animal Welfare, Islamic Relief,

## THE FUNDRAISER'S GUIDE TO MID-VALUE DONORS

Jewish Deaf Association, John Grooms, Kew, League of the Helping Hand, Leprosy Mission, The Local Library, Macmillan Cancer Care, **Marie Curie Cancer Care**, Mulgrave Community Sports Association, Action for ME, Medical Foundation, MedicAlert, Mencap, Mind, Mission Aviation Fellowship, Multiple Sclerosis Society, Mediciens Sans Frontieres, NSPCC, The National Gallery, National Heritage, The National Portrait Gallery, NCH, Norwich Youth for Christ, Nottingham Housing Trust, The National Trust, Orbis, Oxfam, Pathway, The Phoenix Appeal, Plan UK, Practical Action, The Red Cross, The Refugee Council, The Royal British Legion, The Royal National Institute for the Blind, The Royal Horticultural Society, The Royal Geographic Society, The Royal Society of Arts, The Royal Society for the Protection of Birds, RSPCA, RNLI, The Salvation Army, The Samaritans, SSAFA Forces Help, Scope, The Scripture Union, Send a Cow, **Shelter**, Sight Savers, Smile Train, The Soil Association, SOS SAHEL, SPANA, The Spine Foundation, Saint John's Ambulance, St. Martin-in-the-Fields, Saint Mungo's, The Star and Garter, Save the Children, Terrence Higgins Trust, The Tibetan Foundation, Trinity Hospice, UJIA, UNICEF, Victoria & Albert Museum, VSO, War on Want, Wateraid, World Cancer Research Fund, Wildlife London, Women at Risk, Womenkind Worldwide, The Woodland Trust, World Jewish Relief, World Vision, WWF, YHA, YMCA

bluefrog



Research undertaken by Amber Nathan  
Edited by Mark Phillips

July 2007

# WHY RESEARCH MID-VALUE DONORS?

They're worth a huge amount of money  
but few people know what really motivates them to give

**As fundraisers, we know our Lower Value Donors (Dorothy Donor) and Major Donors (Colonel Cash) very well thanks to creative testing, focus groups and interviews. But few organisations have devoted this kind of attention to the Mid-Value sections of their files.**

This is in spite of the fact that these donors currently account for a significant proportion of our sector's income and can give far more. In testing, Bluefrog has found that we can usually double net income from this segment.

But we wanted to make appeals even more effective by deepening our understanding of the beliefs, needs, motivations and values that underpin these behaviours.

## How do we define Mid-Value Donors?

**Mid-Value Donors:** Anyone whose ability and propensity to give make it worthwhile spending more (compared to a 'core' file) on developing their relationship with the charity.

**The Sample:** Donors who'd made multiple cash gifts of between £100 and £1,000 in the last two years. Recruited from the files of ActionAid, CARE International UK, ChildLine, Cancer Research UK, Marie Curie Cancer Care and Shelter.

## The research

**The Process:** 100 in-depth interviews lasting an average of 1 hour 15 minutes. The project took six months – from October 2006 to March 2007 – to complete. All recruitment, fieldwork and analysis was conducted by Amber Nathan, Bluefrog's in-house researcher.

**The Limitations:** The qualitative nature of our study allows us to explore the motivations behind donors' actions. 100 in-depth interviews is a huge sample by qualitative research standards. We are extremely confident in our findings.

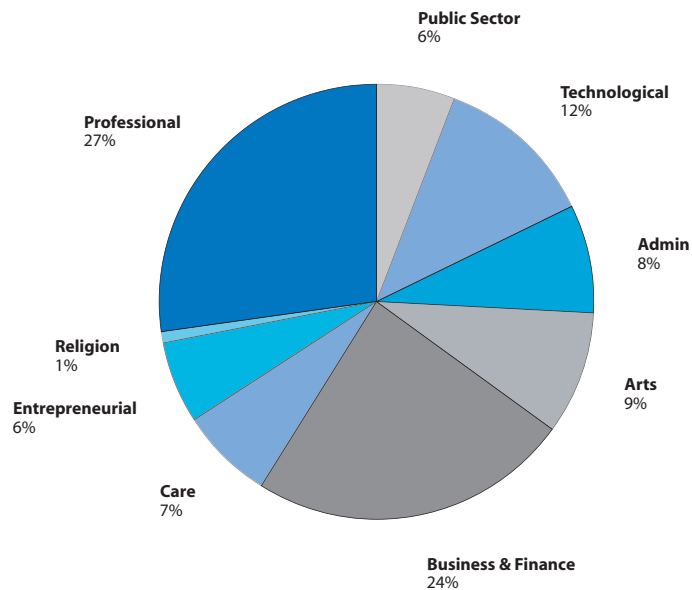
## Are they really different?

Throughout, we asked ourselves a key question:

### **Aren't these people the same as everyone else – they just happen to give more?**

To a degree, the answer is yes. But when we dig deeper into what they expect from charities and what motivates them to give, there are fundamental differences.

The people we spoke to were more knowledgeable and considered than core donors. They were far more analytical in their approach to life and to decision-making. They read the broadsheets, not the tabloids and they watch out for charities in the news.



### Employment breakdown

84% of them were degree educated. Of those still working, the majority were in intellectually demanding, white collar jobs.

They were noticeably younger than traditional charity files and almost two-thirds were men.

# THREE KEY TYPOLOGIES

Three distinct typologies have been identified. Respondents were categorised both on their giving behaviour and the basis of their motivations and barriers to giving to charity.

## Noblesse Oblige



These donors made up 20% of our sample. They tended to be older with an average age of 73. Relative to the other two typologies, they were giving away smaller proportions of their income or net worth.

Many have come from old money or made a great deal when they worked. They can be considered quite posh and have a traditional demeanour.

They are used to having money and have never wanted for anything. That isn't to say they're not grateful for what they've got, but they find it harder than others to imagine not having it.

They give large sums away. This could be to a few charities where they would be seen as very important supporters or to a large number of charities where they would be bouncing along the bottom of the Mid-Value radar.

## Humble and Holy



Constituted another 20% of the sample. They have relatively low incomes with most living on or below £25k and are employed in professions such as teaching, civil service, administration or care.

They tend to be quite religious – many of them are tithing. If they're not religious, they're extremely close to the cause and give very generously relative to their income.

They're not often giving in the £100+ per year bracket to more than one or two charities. If a charity is getting that much, they're most likely a favourite. More often than not, the **Humble and Holy** are giving to capacity.



## Middle Class Heroes

This was by far the biggest section of the sample at over 60%. They were also younger. Half were under 50. Several were under 40.

This group feel like the middle classes proper – medics, financiers, lawyers, high-level businessmen, with a few entrepreneurs and IT consultants thrown in for good measure.

Almost none of them were born into significant wealth. They've worked hard for what they have and are proud of their achievements. They have a firmly internal locus of control and so think in terms of what they can achieve, not the hand that they were dealt.

These donors have the potential to give a lot more. But there are some barriers to giving that are disproportionately apparent for them. They know they're well off, but they don't necessarily feel secure in the long term.

# THEY THINK THEY'RE SPECIAL

Mid-Value Donors all claim that they don't see themselves as particularly generous and that they're just giving according to their means. They say that they don't need special treatment. But almost without exception, they soon contradict themselves.

These donors **do** see themselves as special. They also think they should be treated as special by the charities they give to, even though they wouldn't dream of asking for it.

For the **Noblesse Oblige**, special is embedded in their social status. They're used to a certain degree of courtesy and manners in their daily interactions with the rest of society. They naturally (and subconsciously) project this onto their expectations of charities even though they'll proclaim that they don't want charities to make a fuss of them.

They know they're wealthy and that the less wealthy don't give as much. So they presume that their gifts are of relative worth. This naturally invokes an undercurrent of feeling special, no matter how much they like to deny it.

The way they talk about their correspondence with their favourite charities (to which they give more), reveals a degree of self-congratulation that comes with the belief that they're appreciated. This treatment confirms to them their special status.

For the **Humble and Holy**, their view of themselves as special is the most concealed. Their 'I'm not special' proclamations are the strongest. After all, humility is a virtue and pride a sin. But they reveal how worthy they think they are via their references to how others should be more charitable.

"I FIND IT QUITE STRANGE. PEOPLE DON'T SEE WHAT'S GOING ON AROUND THEM. 'SO LONG AS I'M OK, IT'S OK.' IT CAN BE A BIT OF A DISAPPOINTING CONVERSATION." (Male, 30s)

They can't bring themselves to articulate how worthy they see themselves, because that would undermine their view of themselves as selfless, caring people. Many deeply suppress this feeling. To them, giving to charity is the norm and those who can but don't are not very nice people.

For the **Middle Class Heroes**, special is self-congratulatory. It's about being a good, generous person.

Like everyone else, they tell you that they're not special nor doing this for recognition. They preach the virtues of not asking for thanks or proclaim revulsion at the idea of money-wasting receptions.

But like the **Noblesse Oblige**, they also reveal a projection of their relationships with businesses and professionals. They talk about what's courteous and what's

not, what's right and what's wrong. It's all about being appropriate. Manners are everything. If they behave in a certain way, then so should the organisations they give to.

They've earned the respect and status that they have, and they can imagine losing it. That's why it's a big deal for them to be giving away their money – even if they are very rich. It really does make them a bit of a hero.

## Special is normal

Each of our typologies has different reasons for feeling special. But they all have one thing in common. They are not really aware of it, and when they are, they feel rather uncomfortable.

For these donors, special is normal. So while we must certainly offer them a degree of special treatment, we should never make it too obvious that that's what we're doing.

# WHY DO THEY GIVE TO CHARITY?

## The rewards of giving

Like all donors, Mid-Value Donors described all the usual reasons to give. They talked about wanting to put something back, feel good, avoid guilt, build self-image or enhance social status. For some, giving serves as insurance or karmic warding off. For others, it's a source of entertainment.

But while similarities are interesting, differences are important.

There was a strong sense of obligation for the **Noblesse Oblige**. They'll tell you they do it because they can and should, because it's the right thing to do. They're not likely to volunteer the notion that they do it because as moneyed people they're expected to fulfil that role in society. But the more they talk about it, the more they reveal an attitude of 'someone's got to do it, society says that's me. I'd be a bad person if I didn't'.

"I'M A CHRISTIAN, SO I BELIEVE  
IN GIVING AS MUCH AS I  
CAN AND ANYTHING I GIVE  
WILL BE REPLENISHED BY  
GOD. THE MORE THAT  
I GIVE, THE MORE I'LL  
RECEIVE." (Male, 50s)

It's as if giving is something that someone of their status is expected to do, so they do it to uphold the status quo. This social code is not a boat they want to rock; it's worked for them for too long.

The **Humble and Holy** say they're giving because they should.

The irreligious ones give so generously because of closeness to a cause. They talk about owing support.

The religious talk about it as if their support were a given, a way of life. It's one of various expressions of their faith. They weren't unthinking or unquestioning when discriminating between charities but, for giving in general, there was an almost automated display of obligation.

**Middle Class Heroes** were notably different. While the other two typologies describe a socially-dictated *obligation* to give, these donors most often describe their giving as a *desire* to put something back.

They talk about wanting to make the world a better place. There's less talk about rules or how they should behave. They talk of making decisions and seeing things through.

When challenged with notions of obligation or guilt, they don't like admitting it, but it's there.

“THE REALISATION WAS THAT, UP TO THEN, DONATIONS WERE HOW TO GET RID OF SOMEBODY AT THE DOOR... THEN I BEGAN TO REALISE MY SENSE OF PRIVILEGE...” (Male, 40s)

They also provided anecdotes of an event or a time when they realised that they were earning above their needs. This was often the trigger to starting to give to charity in a more systematic way.

Their most powerful motivations are the least explicit. They revealed these when they talked more generally about charitable issues – their preferred causes, charities and methods of giving. Put simply, there is a sense of wanting to be a hero.

They don't feel as secure as they'd like financially because they have the insight or experience to understand that they could lose it. Their version of success is to do with real achievement. For those from the most humble backgrounds, it goes as far as wanting to beat the odds.

So they need their gifts to mean something. They need to believe that it's truly making a difference in order to justify parting with their hard earned cash. For them, gratification comes from that sense of achievement that they've been conditioned to associate with all things good.

### **Mid-Value Donors give to meet their needs, and for self-definition**

Over and over again, Mid-Value Donors demonstrate how they're giving in accordance with their own needs, not the needs of a particular charity or the charity industry, or (as they'd lead you to believe) because the world needs them.

Their gifts are displays of a need to define themselves and feel better about themselves in accordance with who they'd like to be, or think they should be.

It follows that if special is normal for these donors, we need to pay serious attention to their needs.

# HOW DO THEY DECIDE WHO GETS WHAT?

## Choice reflects donors' needs

Most Mid-Value Donors wait to be asked, just like anyone else. Most often, they were recruited via direct mail, a press or TV ad, or were introduced to a charity by a friend or through their place of worship.

**But after they are recruited, donors give the most to the charities that make them feel the best about themselves.**

"I'M THE LEAST HAPPY WITH <CHARITY>, SO I GIVE THEM A VERY MODEST AMOUNT."

(Female, 70s)

## Moving up the league table

League tables exist subconsciously and in reality.

For the **Noblesse Oblige**, the charities they're giving Mid-Value gifts to are in their second division. For the **Humble and Holy** the same levels of giving make them their first division.

There are many things outside our control such as a personal connection, that will move a charity up or down a league table, but most movement is due to the actions of charities themselves.

As you'd expect, charities that exceed expectations move up. Those that repeatedly disappoint are moved down. Less obvious – but equally real – is the fact that charities that fail to keep up are also moved down. We heard many cases of individuals increasing the amounts they gave to the charities that build a closer relationship with them, whilst those organisations that kept to a standard approach received the standard gift.

Unless you work to keep up, you will be relegated.

## Small is beautiful

When donors spoke about the charities with which they felt they had achieved most, they showed real pride.

These organisations tended to be the smaller charities. Those that made sure the donor had seen what had been achieved with their help.

To Mid-Value Donors, 'smaller' is a powerful concept. It has come to mean more

efficient, responsive and innovative. Innovation is strongly associated with progress and being a leader in a given field.

When these assumptions are challenged, donors happily post-rationalise that they're based on a gut instinct and that they could be wrong.

"THE WAY I'D REALLY LIKE TO GIVE IS TO HAVE FRIENDS THAT I TRUSTED WORKING IN 3RD WORLD COUNTRIES, RATHER THAN GIVE TO THESE HUGE CHARITIES WHERE YOU DON'T KNOW WHAT THE SPEND RATIOS ARE." (Male, 40s)

However, these benefits were only motivating in the context of believing it made their gifts more effective. Donors talked about fantastic feedback and saw this as evidence that the charity was truly changing things. Compared to bigger charities, the impact of their gifts felt more apparent, and so felt more worthwhile. They needed a push to admit it, but the smaller charities also seemed more grateful, which re-affirmed the decision to give, and made them feel more valued.

### A wide portfolio resolves tension

"I ASSUME THAT THEY AVOID A LOT OF DUPLICATION AND THEY GET THINGS DONE. THEY'RE THE ESTABLISHMENT." (Male, 70s)

Many of the donors are also supporting the top twenty charities. This is usually because they had fundraising programmes that ensured the donor was actually asked for help. But rather than simply say they give because they were asked, they justified it by contradicting their rationale for giving to smaller ones. They talked about how large charities can have more expertise in certain areas, preclude duplication, or are a trustworthy choice.

"IT'S A BIT LIKE SHARES. YOU HAVE BP AND TESCO AND WHATEVER AND THEN YOU HAVE INTERESTING LITTLE ONES THAT HAVE BIG POTENTIAL." (Male, 30s)

But these donors don't see their decisions to support both big and small as contradictory. Instead it's their way of relieving the tension of wanting to believe in the smaller charities and enjoying the treatment they get from them versus the belief that the big charities are probably a safer choice.

### They like underdogs

"MIND – BECAUSE THEY GET SUCH A RAW DEAL. AND HANDICAPPED KIDS – BECAUSE THE KIDS AREN'T ATTRACTIVE LOOKING...IT'S HARD TO ADVERTISE FOR HELP FOR THEM." (Female, 40s)

There's a degree of intellectual vanity at work here. People like to congratulate themselves for thinking of something that others didn't.

This was more prevalent with the **Middle Class Heroes** for whom giving was a way to define themselves as a champion of the underdog.

### Engagement generates gifts

Engagement varies hugely from person to person. There were no obvious patterns of engagement by cause, donor age group or typology. *What was important was the level of engagement.* If a charity is top of an individual's league table, it's more likely to be front of mind. And time after time, the top few charities received the lion's share of a supporter's donations.

The charity's place in the league table is reviewed or confirmed depending on what it does for the donor. It gets the sizes of gift or levels of attention and engagement that its league table position accords it.

# HOW DO THEY LIKE TO GIVE?

## Writing a cheque feels good

They have seen the £3 a month TV ads, so they know their gifts are relatively large, and feel good about this. A few of them talk about the administration costs of processing more gifts. But most commonly, they talk about how they prefer to give large donations rather than in 'drips and drabs'. It feels good to give gifts that they believe will make a bigger difference. Writing a big cheque feels real.

"I OFTEN GET COMMUNICATIONS SAYING PLEASE GIVE REGULARLY EVERY MONTH, AS IF THEY'D RATHER HAVE THAT THAN AN ANNUAL DONATION. BUT IT'S JUST LIKE PAYING THE GAS BILL."

(Female, 60s)

They understand that gifts tend to go into a big pot, that ultimately there's no difference between £25 a month versus £300 a year. But they like the sense that their donation is making a difference and that they're in control of the situation.

This would seemingly imply bad news for regular giving.

"YOU DON'T HAVE THE BARGAINING POWER IN THIS RELATIONSHIP. THIS IS A TOTALLY VOLUNTARY THING, A CHARITABLE ACT...

I APPRECIATE REGULAR INCOME NEEDS. BUT I'M NOT GOING TO SWITCH. AND ANY ATTEMPT TO FORCE ME WILL GET MY BACK UP." (Male, 40s)

But this isn't the real root of their resistance. More often, they've been affronted by the way they were asked for a regular gift. The correspondence was too impersonal, or presumptuous, or the wrong person did the asking.

Often the request was understood to mean a replacement for their cash gifts, which felt very ungrateful. Even worse, when the amount would total less than they were giving already, it implied fundraising incompetency.

## People create management systems

For some people, the act of giving is a chore. As the pile of appeals on the sideboard builds up, it becomes a threat, not an opportunity – the pleasure is in completion. For others it's a hobby. The whole process is a pleasure; many of them have notebooks, rotation systems and planning sessions.

What nearly everyone has in common is that they are strikingly set in their ways. People's lives don't revolve around giving. They want charities to fit into their lives. If appeals clash with an individual's system, it jars and donations are likely to be withheld.

## Recruitment sets their expectations

Where a donor responded to a direct mail appeal, the pack that they gave to is quickly forgotten and subsequent mailing packs – from your charity and others – become an amalgam of each other.

“OH GOODNESS. NOW YOU’RE ASKING! THEY WROTE TO ME I’M ALMOST CERTAIN BUT I DON’T REMEMBER WHAT THEY WROTE. IT WAS VERY LONG TIME AGO.”

(Female, 60s)

“WHEN THEY ASKED FOR A THOUSAND POUNDS WE THOUGHT ABOUT IT. IT WAS NICE BECAUSE THEY WERE APOLOGETIC AND ACKNOWLEDGED HOW CHEEKY IT WAS TO ASK. AND THE APPEAL HAD A SPECIAL NAME.” (Female, 40s)

“IT’S LIKE MOBILE PHONES. YOU GET A NOKIA AND IT’S GREAT AND UNLESS IT BLOWS UP THEN NEXT TIME YOU GET ANOTHER AND IT’S NOT SUCH A BIG DEAL.” (Male, 30s)

“EMAIL IS IDEAL TO SAVE MONEY BUT I WOULD BE MORE LIKELY TO DELETE THEM.” (Male, 40s)

“...OOOH. THAT MIGHT BE MORE EFFECTIVE FOR ME. OR NOT. I PROBABLY WOULDN’T READ THOSE EITHER.” (Female, 50s)

What can stand out is the amount they were asked for, particularly if it was a very high value request.

If the gift was unsolicited or if there were particularly emotive circumstances at the time the memory is far stronger.

In either case, the amount given at the outset has a significant impact on the size of subsequent gifts.

### Less is more

People’s portfolios of charities may grow as they get into giving, but for most people this eventually stops. The younger end of the sample talked about wanting to focus on the causes that they most believed in. Many of the 65+ year olds talked about wanting to ‘draw the line’ and to be able to refuse to give to anyone they’d not given to before.

There are various reasons for this. Fewer charities and thus fewer gifts mean Mid-Value Donors can make bigger ‘hero’ gifts. People also have a desire for simplicity. For example, young workers described being very busy, and wanting to get more organised in all spheres of their lives, not least financially. For the middle aged, there was often a desire to finalise decisions about who gets what. This often coincided with retirement plans.

The charities at the top of personal league tables are the ones that will benefit from this behaviour. Those that have slid into the second division will find their income shrinking.

### They’re not ready for e-mail appeals

Aside from the very elderly, most people are online. People see the rational benefits of it – both financial and environmental – but the general conclusion was that e-mails don’t have the ‘stand-out’ quality of a letter and they’re easy to ignore or delete.

Conversely, going on-line to make a charitable donation, checking a charity website for information or receiving e-mail feedback were all well received as ideas. Some people were already happily receiving feedback and making one-off payments this way.

# WHAT DO THEY EXPECT?

“YOU MAKE ALLOWANCES FOR CHARITIES THAT YOU WOULDN'T FOR BUSINESSES.” (Male, 50s)

These donors are very forgiving. If a commercial business were to treat them with the same standards of courtesy as a charity, it would be out of business within a very short space of time.

But charities can only mess up a few times. Everyone has a breaking point and Mid-Value Donors' breaking points are reached sooner than standard donors'. They talk about dropping charities more often than standard donors. There are lines that it simply isn't worth crossing.

## They want charities to be appropriate

The word *appropriate* is used over and over again, particularly by the **Middle Class Heroes**.

But it's how they use it that's telling. It's often in the context of expressing when something was inappropriate. Appropriate is acceptable, the way it should be. It's invisible almost. Inappropriate slaps donors in the face.

Also, because these donors are reluctant to admit high expectations of charities, we should pay attention to 'inappropriate'. It enables them to express 'not good enough' when their public face doesn't usually 'allow' this.

This takes us back to special and normal. Appropriate is where special and normal meet. This is where charities need to operate. Being 'inappropriate' will hurt a charity's income from Mid-Value Donors.

## So what's inappropriate?

### Getting the easy things wrong.

If errors are made in something as simple as donor correspondence, donors project this lack of proficiency onto other work. This instils doubt in their decision to give.

“THEY CALL ME UP TO ASK FOR THE TAX. DON'T THEY UNDERSTAND WHAT A CAF ACCOUNT IS?” (Male, 70s)

### Making misplaced low value CoG asks.

These requests are 'misplaced' if the donor has already said no on numerous occasions. That's seen as nagging and rude. A donor posting a cheque every January sees themselves as a regular giver, whether or not they're on a charity's committed givers file. Any correspondence implying otherwise is insulting. It's also seen as ungrateful if the donor misunderstands that regular gifts are supposed to

“WHY ARE YOU ASKING ME FOR £5 A MONTH WHEN MY ANNUAL SUBSCRIPTION IS WORTH MORE?” (Female, 60s)

replace their cash ones. And if the cumulative value is lower, then the charity is seen as incompetent. This takes us back to the projection issue – no one wants to fund incompetence.

“I WASN'T TOO HAPPY WITH THE TONE OF <CHARITY> LITERATURE RECENTLY... IT IMPLIED THAT <PROBLEM> WAS ON THE INCREASE, WHEN IN FACT WE JUST KNOW MORE ABOUT THAT STUFF NOW.”

(Female, 40s)

#### Dumbing down the facts

Most Mid-Value Donors have a high opinion of their own intelligence. They need to believe that you think they're clever too. If issues are watered down or simplified too much, it can be seen as an insult to their intelligence.

“I DON'T LIKE HAVING MY EMOTIONS PLAYED ON, IT'S A BIT RUDE – I LIKE TO BE MORE RATIONAL.” (Female, 60s)

#### Emotional blackmail

Nobody denies that they're moved by the stories that charities tell. But overly emotional appeals are seen as emotional blackmail. They think they're above having their heart strings tugged on. To imply that they respond emotionally is to insult their intelligence, even if they know it's true. Their public face demands respect for their rational decision-making skills.

“DON'T THEY REALISE I'M NOT ANSWERING THESE? IT'S BEEN YEARS NOW. [I GIVE] ONCE A YEAR, THAT'S IT, I'M SORRY.”

(Female, 60s)

#### Being bombarded

Being bombarded by charities that they're not yet giving to is expected. But if they see themselves as regular, loyal or generous donors to a charity, then asking too often screams of a lack of gratitude and respect. It's also seen as a waste of money.

“THEY TEND TO INCLUDE SOMETHING...AND I UNDERSTAND WHY THEY DO THAT...BUT IT WAS A BIT PATRONISING.” (Male, 20s)

#### Gimmicks and gifts

This doesn't mean socks and umbrellas. It means creative illustrations of a message rather than patronising gifts. Put simply, many 'standard' mailing pack elements don't work for Mid-Value Donors. Instead, they risk insulting intelligence.

“I DON'T LIKE BEING CALLED FOR ANYTHING. IT WAS ALRIGHT WHEN YOU CALLED BEFORE BECAUSE I HAD A LETTER SO I WAS EXPECTING IT.” (Female, 60s)

#### 'Cold' calling

This is discourteous and rude. It's an uninvited invasion of personal space. But 'uninvited' not 'personal space' is key here. If they know the call is coming, and if they have the option to say no, then that's okay. This is because it's giving them the choice, being respectful of their needs.

“IT'S THE FACT THEY KEEP ON AND IT'S NOT PERSONAL. IT JUST FEELS INDISCRIMINATE.” (Male, 60s)

#### When it feels too impersonal

'Too impersonal' is a feeling that donors get from a charity's correspondence. It could be from any of the things that we've listed as inappropriate. It's the sense that 'this correspondence is going to everyone' as opposed to 'this correspondence is for me'. So 'too impersonal' becomes a separate issue, which implies a lack of respect or gratitude.

# WHAT DO THEY REALLY LIKE?

“I’M HELPING GET A WATER SYSTEM GOING IN KENYA.”  
(Male, 60s)

## Their ‘own’ projects

This is where real engagement lies. Ownership makes them feel instrumental not incidental. It’s a reward for their generosity. It allows them to feel like a hero.

“IT’S GOOD BECAUSE YOU GET A SENSE OF WHAT YOUR MONEY’S GOING ON, WHAT IT COSTS TO DO THESE THINGS.” (Female, 50s)

## To buy ‘things’

The tangibility of shopping lists allows the ‘I’m making a difference’ sense of achievement. They also work because they serve as illustrations of what things cost. These donors are well aware that funds are untied. But they suspend disbelief, because it suits them.

## They want thanks

Even if they say they don’t want thanks, they do.

“I’D RATHER THEY DIDN’T WASTE THEIR TIME WRITING LETTERS THAT JUST SAY THANKS” (Female, 70s)

roughly translates as,

“THEY SEND YOU LETTERS SAYING THANKS EVER SO MUCH... THEY DO MAKE YOU FEEL GOOD THAT YOU’VE DONE IT” (Female, 40s)

“I’M BORED OF SILLY FUNDRAISING STORIES. SOMEONE SITTING IN A BATH OF BAKED BEANS IS OF SUPREME INDIFFERENCE.” (Female, 40s)

## They want feedback

This is the one area where donors actually say what they mean. Feedback is key.

Newsletters are expected but they’re not pored over. They’re more interested in the figures than the fundraising story ‘fluff’.

“I LIKE BULLET POINTS AND PIE CHARTS. THAT’S GREAT... TWO SHEETS, THIS IS WHERE YOUR MONEY WENT LAST YEAR AND THIS IS WHERE WE’RE TARGETING THIS YEAR.” (Male, 60s)

The **Middle Class Heroes** claim they want one page. They have a thing about bullet points and pie charts.

Appeal-specific feedback is loved. It validates the donor’s gift and their choice of charity. It also validates the idea of gifts making a tangible difference. If there’s immediate and regular feedback that’s great, but they also want long-term information too. Delay or a project’s failure does not have to be bad news. The honesty is hugely appreciated.

“IF IT’S A MEDICAL RESEARCH PROJECT, THEY MIGHT FIND NOTHING FOR A WHILE. FINE. SO TELL ME THAT.” (Male, 70s)

"I WANT REPORTS FROM THE FIELD. THEY MAKE YOU FEEL IN TOUCH WITH THE PROJECTS... THIS IS WHAT YOUR MONEY'S DOING AND HERE ARE THE RESULTS." (Male, 60s)

"IF ONLY THEY WERE TO SAY WE COULD DO TWO LEVELS, MONTHLY REPORTS OR AN ANNUAL ONE. WHAT IS IT YOU'D LIKE FROM US?" (Male, 40s)

"I'M NOT OUT THERE READING ALL THE NEWSPAPERS SO FOR ME IT'S FINDING OUT ABOUT ALL THE ISSUES AND WHAT <CHARITY> ARE DOING ABOUT IT." (Male, late 20s)

"THE BEST STUFF IS A COUPLE OF SHEETS WITH A LETTER FROM THE PROFESSOR...NOT A GENERIC LETTER JUST FROM SOMEONE IN THE COMPANY." (Male, 60s)

"I'M NOT LIKELY TO READ INTO ALL THE DETAIL UNLESS IT SOUNDS DIFFERENT...I WAS SENT MATERIAL ABOUT A PRINT SHOP IN A PRISON SOMEWHERE. QUITE INTERESTING. IF IT'S A NEW INITIATIVE THAT'S EXCELLENT, I'LL DO IT." (Male, 60s)

"THEY WERE BUMPED UP INTO THE SECOND POT BECAUSE THE APPEALS SHOWED A VERY DIRECT IMPACT, AND WERE VERY IMAGINATIVE." (Male, 80s)

The feedback should also feel like it's been prepared for the individual. If it's too slick in design it feels mass produced and impersonal. They like letters, photocopies and photos. The more genuine they look, the better.

## They want to be in control

**Mid-Value Donors** need to feel that they're in control – especially the **Middle Class Heroes**. They love it when you ask them what they want. It demonstrates respect.

### Entertainment and education

Direct mail packs that provide engaging and helpful information are appreciated. For example, people talked about health advice from medical charities, or how their favourite development charity was providing a window on the world for them.

### Inside information

When feedback or future plans are relayed to the donor, the more inside-track it feels, the more important and respected the donor feels. It implies a two-way relationship, positioning them as privileged without explicitly saying it. Feeling like they're on the inside fosters loyalty and a sense of belonging, which is even more powerful than engagement.

### Novelty and innovation

Novelty and innovation were unquestionably the characteristics that gave appeals cut-through. These were the appeals that people noticed and recalled.

“PEOPLE ARE GRADED ACCORDING TO HOW MUCH THEY GIVE AND THE LEVEL OF FUSS MADE OF THEM IS LINKED TO WHAT THEY GIVE. NOT VERY NICE BUT IT’S THE WAY OF THE WORLD. IT’S NOT APPEALING TO ME.” (Female, 50s)

“I THINK PEOPLE DO LIKE BELONGING. KEW HAS SPECIAL EVENINGS WHEN IT’S NOT OPEN TO EVERYBODY ELSE. AND BATTERSEA – THEY INVITE US TO A DINNER EVERY YEAR, AND WE DON’T GO BECAUSE WE’RE NOT INTO THAT SORT OF THING, BUT IT’S NICE TO BE INVITED.” (Female, 60s)

“THEY’RE OK – INTERESTING IF SOMEONE IS SPEAKING... BUT IF IT’S JUST A JOLLY, I CAN’T BE BOTHERED. WASTE OF MONEY.” (Female, 70s)

## They want to belong

This is a classic example of the public versus private face that donors have when talking about charity. They say they don’t need to belong, that they don’t want any fuss. Then they contradict themselves by revealing how they like being part of an élite.

It turns out that it’s all in the presentation. If membership promises overt reward or thanks, their public face has to be one of rejection. They also presume any such scheme would induce unnecessary expense, and they’re not allowed to condone that either.

Hierarchies within any given membership scheme are worse again. Some of the **Noblesse Oblige** cope with it – perhaps because they’re used to it. But for the rest, unless you’re at the top of a hierarchy, your support is devalued. To aspire to be at the top smacks of social climbing, and they’re not interested in that.

## They love being invited to things

Most aren’t that keen on actually going to charity events, but that’s almost irrelevant. The invitation makes them feel valued and re-affirms their decision to give.

There are predictable doubts about the expense and purpose of events. Overt jollies are seen as a waste of money, unless they’re very modest events such as carol concerts. A minority from the **Noblesse Oblige** was comfortable with a lavish ‘thank you’ event. But it’s events with a fundraising or educational angle that are the most attractive. For the more technical or political causes, invitations to see or hear some highbrow feedback on charity work were very motivating.

# THE RULES

## Create a Mid-Value programme

Charities need to be brave and invest if they want optimum income from their Mid-Value Donors.

## Remember who they are

Charities need to remind themselves just how educated, rational and successful these donors are. There are few idiots here.

They are defining and re-affirming their positions by giving to charity. They're driven by a need to confirm their status on their terms.

They do not want overt social recognition for their generosity. They want to believe they're making a significant impact because they are good people. This is how they get their status and reward - by charities making them feel like heroes.

None of this will harm charities' relationships with their **Humble and Holy** nor **Nobelsse Oblige** supporters. In fact, it will improve them. The **Humble and Holy** will never have had it so good and the charities that treat them well will stay at the top of their league tables. The same treatment will stop charities slipping off the bottom of the **Nobelsse Oblige's** personal lists.

## Recruit with big asks

Asking for a significant sum will make an impact. And charities need to ensure that they acknowledge that it's a significant sum. Manners are a big deal to the middle classes.

Focusing on a specific project is important. It provides the tangibility, ownership and involvement that donors want. It also helps massively if the charity is able to demonstrate a real difference or to show that they are innovative. Ideally, this focus should be presented in an entertaining way.

## Be appropriate

This means no unannounced calling, getting the detail right, not sending unnecessary gimmicks. Data needs to be well managed to avoid bombardment, inappropriate low-value Regular Giving asks, or poorly-timed appeals.

Unless a donor personally makes specific contact to request that you don't thank them, always do so. Research respondents say they don't want thanks, but they're usually lying, or don't realise they want it. This is especially true when they give very large amounts.

These donors want to feel in control. So offer them that illusion. Ask them what they want and what they'd like – so long as their responses are realistically actionable.

### When asking for cash

Ask for cash for something – even if you just want to illustrate how a gift could be used. Individual projects are a good focus. Charities need to press people's emotional and rational buttons. Sentimentality without enough rationality will annoy and repel. The appeal should also feel as real as possible. The slick mass-marketing aesthetic won't work as well here.

### Be careful when asking for a committed gift

Charities need to tread very carefully here. They need to ensure that the donor understands whether the committed gifts are an addition to or replacement for cash gifts. Whichever way around, negotiate higher.

The most enticing package would uphold donor control and offer genuine involvement in the relationship. It would also offer great feedback and the option of no one-off appeals.

### Give them great feedback

Newsletters aren't enough. There needs to be feedback on specific appeals. It needs to be real and inside track. And keep donors in the loop even if there's no good progress or news.

### Give them membership – but tread carefully

Mid-Value Donors want to belong to an elite, and want to feel valued as donors. But they want self-definition from the implicit rewards. They don't want labels. So charities need to avoid hierarchies or suggestions of overt benefits and rewards.

A workable and motivating system that ticks all these boxes is the creation of a fund for donors to belong to. Charities then have the freedom to build around it according to their income needs. It can provide scope for endless new tangible projects for donors to buy into. If new, it can be positioned as innovative, and donors can be offered the exclusive opportunity to be founder members.

### Invite them to events

People love to be invited to things. But they need to be educational or for fundraising, not a jolly for the sake of it. And don't worry if they don't show up; they're chuffed that they were invited.

### Remember special is normal

The common thread in all of this is status. Mid-Value Donors reject explicit signs of status, but they love its implicit forms. They need to be treated as who they see themselves to be. And they see themselves as special. For them, our previous definitions of special treatment are their definitions of appropriate. For all correspondence with Mid-Value Donors, remember 'special' is 'normal'.

**Mid-Value Donors are a very important segment of donors that has only recently emerged as a group that deserves a special approach.**

Though some charities began recruiting and developing these supporters in the early 1990s, the vast majority of organisations have stumbled on them by accident and have not offered them the type of relationship they want and need.

As a result, very little is known about them. This paper represents the first definitive insight into the world of the Mid-Value Donor. It details the three main typologies. It shows what motivates them and what barriers they use to control their giving. It also presents a number of rules to ensure a Mid-Value campaign has the best chance of success.

Thanks goes to ActionAid, Cancer Research UK, CARE International UK, ChildLine, Marie Curie Cancer Care and Shelter, all of whom gave access to their supporters. Without their help, this research would not have been possible and the sector would be poorer as a result.

This research is available for all charities to use or quote from provided that Bluefrog is given credit. For further information, please contact Amber Nathan, Head of Research, Bluefrog Limited at [amber@bluefroglondon.com](mailto:amber@bluefroglondon.com)

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Front cover design: The organisations spontaneously identified by participating donors as charities they currently support, along with the highlighted charities who were part of this research.