

# Segmentation Worksheet

## How to Communicate with Middle Donors: Segmentation

You'll want to segment your middle donors into smaller groups based, for example, on giving level, volunteer participation, or length of their relationship with your nonprofit. The following worksheet is designed to guide you through the process of segmenting your current and prospective middle donors so you can develop more specific messages that resonate with your audience. Spend time looking through your database to figure out who exactly belongs on this list. Deciding who is a lower-level, middle-level, or major donor in terms of actual donation amount will depend on your specific organization. Use the "notes" section of this chart to brainstorm what you'd like to include in your message to this group.

### Potential Mid-Level Gift Donors

*Criteria: Total donation this year is equal to or less than X.*

<i>Number of records in this segment</i>	<i>Date list was generated</i>	<i>Notes</i>

### Mid-Level Donors

*Criteria: Total donation this year is equal to or more than X; Gift amount is equal to or less than X.*

<i>Number of records in this segment:</i>	<i>Date list was generated:</i>	<i>Notes</i>

Here are more potential ways to segment. This list is by no means required or exhaustive—how you segment your donors ultimately depends on the specifics of your organization. What do you think are some good ways to sort your mid-level donors?

**Long-term donors—criteria:** Donors have been giving to your organization for X amount of time.

- Time frame to use for my search: \_\_\_\_\_

**Engaged donors—criteria:** Mid-level donors who volunteer with your nonprofit.

- Types of engagement activities to search for: \_\_\_\_\_

**Potential mid-level donors—criteria:** Small-gift donors who have volunteered recently.

- Volunteer dates to use for my search: \_\_\_\_\_

## Conclusion

Creating a plan to reach your middle donors is a rewarding fundraising activity, but one that many small nonprofits overlook. Even if you have time only for an occasional email, it's worth it. Your middle donors may not have the means to give more now, but building those relationships can have lasting benefits over time. Our hope is that this worksheet has made the idea of creating a mid-level giving program accessible and easy.