# Building Your Midlevel Pipeline

May 22, 2025, 9:00 am

### **Speaker Introductions**

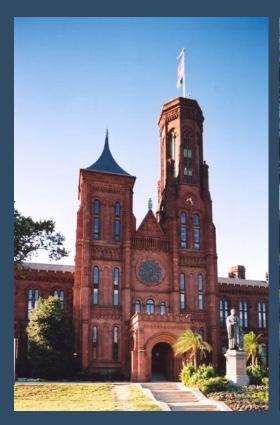
**Dara Igersheim**Vice President, *Avalon Consulting Group* 

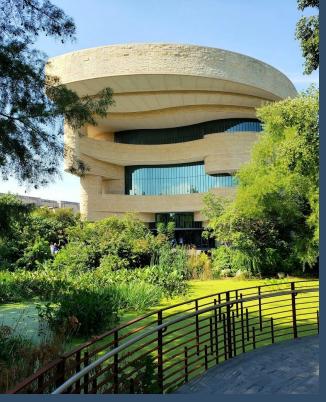
**Colleen Morith**Assistant Director,
Friends of the Smithsonian

**David Saunders**Director of Membership,
National Museum of the American Indian



# Smithsonian Institution and the National Museum of the American Indian (NMAI)





The **Smithsonian**, as the world's largest museum, education, and research complex, has a unique and critical role in finding common ground and creating hope among the American people. With 21 museums and the National Zoo, we are reshaping the future by preserving heritage, discovering new knowledge and sharing our resources with the world.

A diverse and multifaceted cultural and educational enterprise, the National Museum of the American Indian (NMAI) is an active and visible component of the Smithsonian Institution and cares for one of the world's most expansive collections of Native artifacts, including objects, photographs, archives, and media covering the entire Western Hemisphere, from the Arctic Circle to Tierra del Fuego.





# Philanthropy and the Smithsonian

- Federal funds make up about 62% of the institution's annual budget.
- Private funds amplify the impact of Congressional support.
- A staff of about 300 advancement professionals across the institution work with leadership to raise \$300 million annually from individuals, corporations, foundations, and others.
- Donors' contributions support our dynamic exhibitions, vast educational resources, multi-disciplinary research in more than 140 countries, and more.



# Why Midlevel Giving Matters

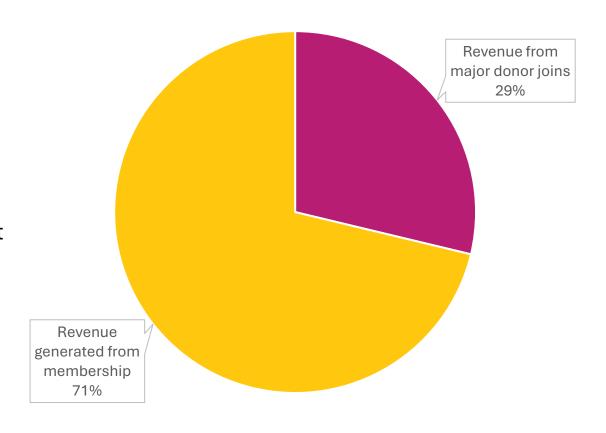
- Bridges the Gap
  - Connects annual members and major donors
- Higher Retention and Long-Term Value
  - Increases donor retention rates
  - Enhances long-term donor value
  - Increased value offsets donor attrition
- Primes Donors for Planned Giving and Major Gifts
  - Midlevel donors are great prospects for planned giving
  - Donor-Advised Funds (DAFs) and IRA potential

### Membership is a pipeline to major gifts

In this example showing an organization's overall major giving in one year, 71% of the revenue was generated by donors originating in the low dollar program.

This view is also typical of most of Avalon's clients and speaks to the long-term impact of membership investment.

#### Total Major Donor Revenue

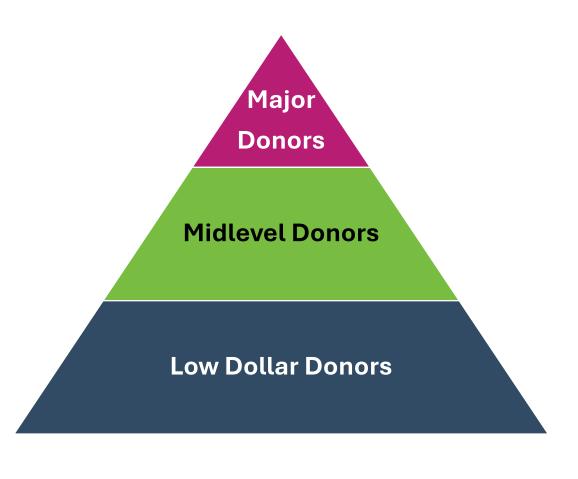


#### What is a Midlevel Donor?

 Typically defined as \$1,000+ (but can vary)

Between
 membership/lower dollar
 donors and major gifts

 Midlevel donors are a qualified pool of major donor prospects!



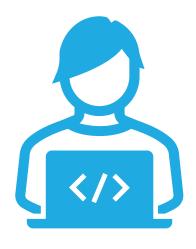
#### **Member Evolution**



### **Understanding Midlevel Donors: Who They Are**







**Giving Behaviors** 



**Motivations** 

### **Understanding Midlevel Donors: What They Need**

**Personalization** 

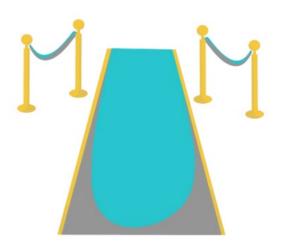
Impact storytelling

Access to insider experiences

Recognition









### **Understanding Midlevel Donors: Why They Stay**



**Engagement Beyond Transactions** 



Sense of Community

### Upgrading as a Philanthropic Choice

- ✓ Using mission-based language, in addition to benefits language, will help to cultivate a strong donor with longer retention.
- ✓ People won't upgrade if you don't ask them. When in doubt, ASK!

### Did you know?

Typically, upwards of 60% of \$1,000+ members join with a membership-level gift...

...and 25% of \$1,000+ members join at the lowest level of membership!

### **Segmentation Strategies**

Mid-Range Members (\$100-999)

Lapsed Midlevel Members

Members with Total Giving >= \$1K in 0-24 months

Prior DAF, Stock, or IRA Donors

Members with Long-term Giving (5+ Years)

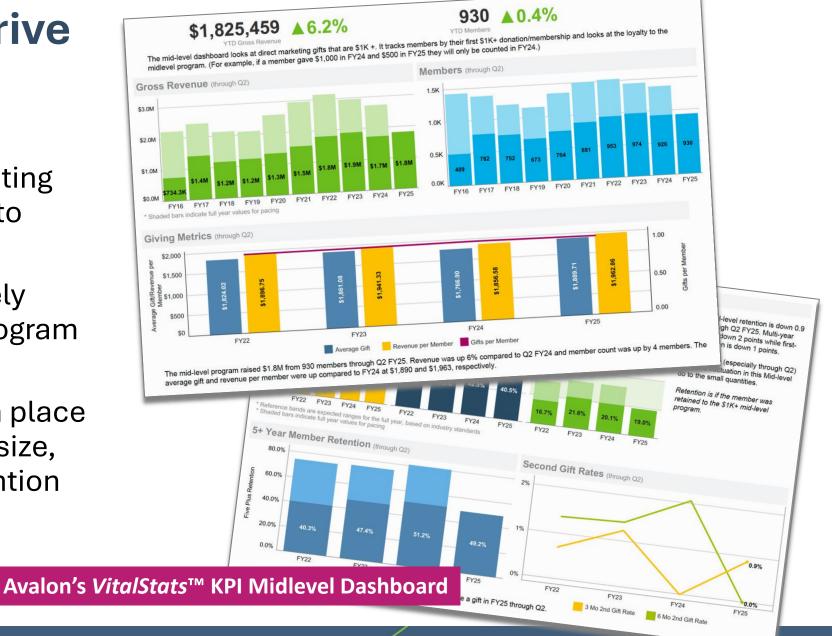
**Event Attendees** 

Travel Program Participants

Wealth Screening
Data

# Using Data to Drive Decisions

- Understanding your existing midlevel pipeline is key to driving upgrades!
- Midlevel metrics are likely buried in your overall program metrics
- Ensure you have tools in place to monitor revenue, file size, giving metrics, and retention



#### Direct Marketing vs. Personal Engagement: A Balancing Act

### Our Focus Today!

## Direct Marketing Contacts

- ✓ Email
- ✓ Direct Mail
- ✓ Phone Calls
- ✓ Texting
- ✓ Digital Ads

# Personal Engagement

- ✓ Events
- ✓ Personal Calls
- ✓ Peer Influence
- ✓ Ambassador Programs



### **Strategic Upgrading**



#### **Appeal**

Encourage upgrades with additional gift asks



#### Renewal

Strategies for upgrading members in renewal cycle



### Stand-Alone Upgrades

Independent upgrade campaigns



#### **Offers/Benefits**

Incentives provided to upgrade members

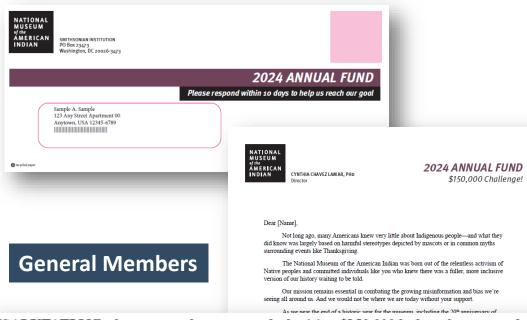


### Segmentation Strategies

Targeting based on prior response

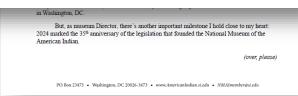
### **Appeal with Upgrade Ask**

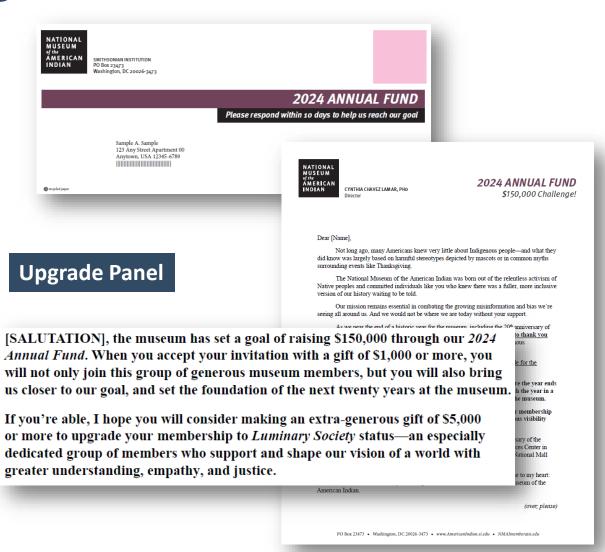
### **Annual Fund Appeal with Upgrade Ask**



[SALUTATION], the museum has set a goal of raising \$150,000 before the year ends through our 2024 Annual Fund. These crucial funds will help us finish the year in a strong position, and lay the foundation for the next twenty years at the museum.

Can I count on you to help us reach this important benchmark? Your membership renewal gift of \$MRM, \$1.5MRM, or even \$2MRM ensures Indigenous visibility and representation in the narratives about America.





### **Annual Fund Appeal with Upgrade Ask**

#### **General Members**

NATIONAL
MUSEUM
of the
AMERICAN
INDIAN

#### 2024 ANNUAL FUND GOAL: \$150,000

☑Yes, Cynthia! I am proud to help the museum raise crucial funds to dispel harmful stereotypes and amplify Indigenous perspectives through exhibitions, educational programs, special events, and more. Enclosed please and my 2024 Annual Fund membership renewal gift of:

 $\square$  \$[hpc]  $\square$  \$[1.5hpc]  $\square$  \$[2hpc]  $\square$  Other \$

Name Lastname Address Address

City, ST 00000-00000

Make your check payable to the National Museum of the American Indian or NMAI. To donate by credit card, please see the reverse or visit http://go.si.edu/ Please respond within 10 days to help us reach our goal!

MEM

SMITHSONIAN INSTITUTION Washington, DC 20026-3473

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#### **DIRECTOR'S COUNCIL OF FRIENDS** Enrollment Form ☐ Yes, Cynthia! I am proud to accept your invitation to take a leadership role in helping the museum dispel harmful stereotypes and amplify Indigenous perspectives through exhibitions, educational programs, special Enclosed please find my gift upgrading my membership to the following level: Director's Council of Friends □ \$1,000 (or \$500 semiannually, \$250 quarterly, \$83.34 monthly) \$2,500 (or \$1,250 semiannually, \$625 quarterly, \$208.34 monthly) Luminary Society □ \$5,000 (or \$2,500 semiannually, \$1,250 quarterly, \$416.67 monthly) ☐ I cannot join the Director's Council of Friends at this time, but I want to support the museum's n Please use the enclosed tax-deductible gift toward the museum's 2024 Annual Fund goal: □ \$[1.5hpc] □ \$[2hpc] □ \$[2.5hpc] □ Other \$\_ Name Lastname Address Address Address City, ST 00000-00000 MEM GIFT [ID NUMBER] [SOURCE CODE] Make your check payable to the National Museum of the American Indian or NMAI. To donate by credit card, please see the reverse or visit http://go.si.edu/dcof-join-**Director's Council of Friends Payment Options** ☐ OPTION A: Check Enclosed (Full Payment Only)

I have enclosed a check for my entire donation of \$ made payable to NMAI. Please charge the credit card provided for the total amount indicated above with payment increments charged: ☐ One-time payment ☐ Semiannual ☐ Quarterly ☐ Monthly ☐ Mastercard ☐ Visa ☐ American Express ☐ Discover Card No.: Expiration Date: Signature: Email:

□ OPTION C: Bank Transfer

Signature:

☐ I prefer to make a donation via bank transfer (Membership Payment Plan Only)—SEE REV

☐ I do NOT wish to receive any benefits with my Director's Council of Friends membership, as to be 100% tax-deductible.

#### 2024 Annual Fund Payment Options - One-time Gifts Below \$1,000

☐ OPTION A: Check Enclosed | I have enclosed a check made payable to NMAI.

Please charge my credit card in the amount of \$\_ OPTION B: Credit Card ☐ Mastercard ☐ Visa ☐ American Express ☐ Discover Card No. Expiration Date:

#### DIRECTOR'S COUNCIL OF FRIENDS

All of the above, plus

2024 ANNUAL FUND

Help the museum raise \$150,000!

Please respo

to help us rea

AMERICAN INDIAN

- · Sterling silver lapel pin, custom designed by renowned artisan Ray Tracey (Navajo)
- · Recognition in and a copy of the Smithsonian's Annual

#### **Upgrade Panel**

#### Bank Transfer Confirmation (Membership Payment Plan Only)

☐ To activate the bank transfer option, I have enclosed a check made payable to NMAI for my first installment from the bank account I wish to use. A subsequent gift installment will be transferred until my pledge is paid in full.

\*If your enrollment is via installments, please read and sign below:

Pledge Terms of Agreement: I authorize the National Museum of the American Indian to transfer my pledge amount from my bank account, or to charge the amount to my credit card. This authorization shall remain in effect for one year, or until I provide the NMAI with 30 days' notice that I wish to end this agreement. A record of each payment will be included in my credit card or bank statement and will serve as my receipt.

rint full name: Sign	ature:
ate signed:Tele	ohone:

#### ADDITIONAL WAYS YOUR GIFT CAN MAKE AN IMPACT

Donor Advised Funds and Individual Retirement Accounts

The National Museum of the American Indian welcomes your gifts from Donor Advised Funds and Individual Retirement Accounts. To help in ensuring that your gift aligns with IRS tax requirements, no membership benefits will be provided in connection with donations made through these giving vehicles. For more information, please contact us at NMAImember@si.edu.

#### **EXCLUSIVE DIRECTOR'S COUNCIL OF FRIENDS BENEFITS** and LUMINARY SOCIETY BENEFITS

In recognition of your commitment, you will receive the following valuable benefits:

#### DIRECTOR'S COUNCIL OF FRIENDS \$1,000-\$2,499

- · A copy of the NMAI publication Do All Indians Live in Tipis? Questions & Answers from the National Museum of the American Indian when you join
- · Invitation to an exclusive annual Director's Council of
- A 20% discount in NMAI and Smithsonian Museum Stores
- · A \$500 per person discount off one Smithsonian Journeys

#### \$2,500-\$4,999

- A gift membership in the Sky Meadows Circle for a family member or friend

#### **LUMINARY SOCIETY** \$5,000+

#### · Exclusive Luminary Society welcome packet

- · Invitation to the annual Luminary Society appreciation event
- Direct access to Luminary Society liaison for personalized assistance (museum visits, membership support, additional
- · Annual Luminary Society gift pack featuring a museum book or other item specially selected for Luminary Society
- · VIP Invitation to exhibition openings and selected special
- . Museum IMPACT Report detailing key programs and museum accomplishments made possible through philanthropic gifts
- · Annual recognition in American Indian magazine's Luminary Society donor page
- Listing in the Smithsonian Institution Annual Report



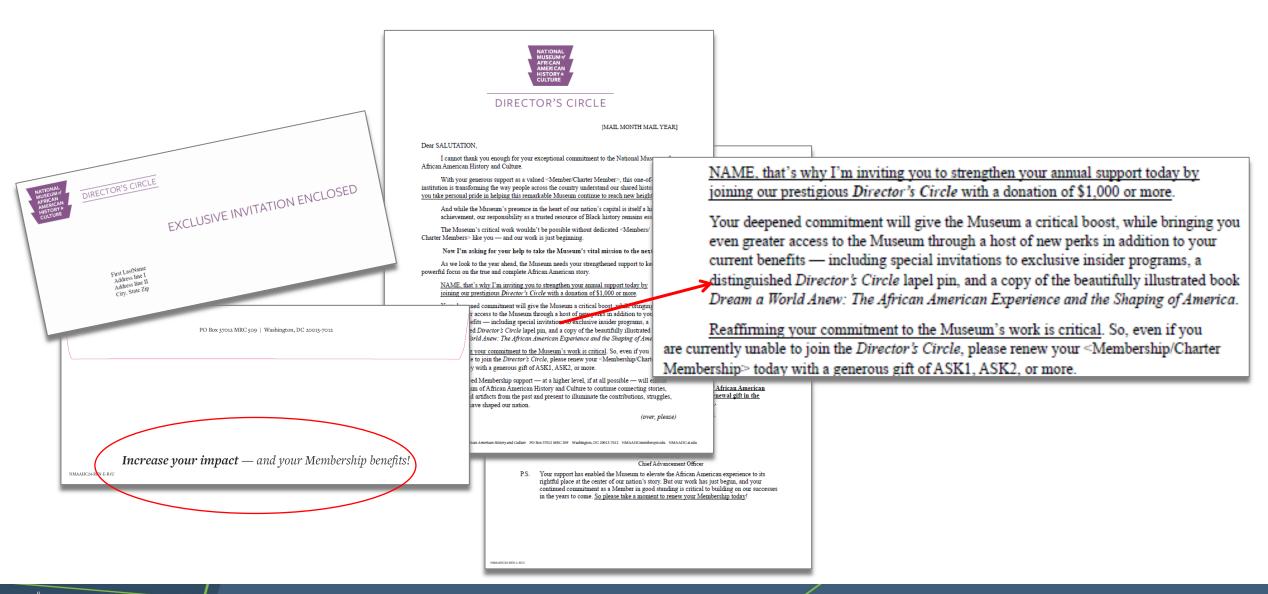
Scan here to join now!

Membership benefits are subject to change

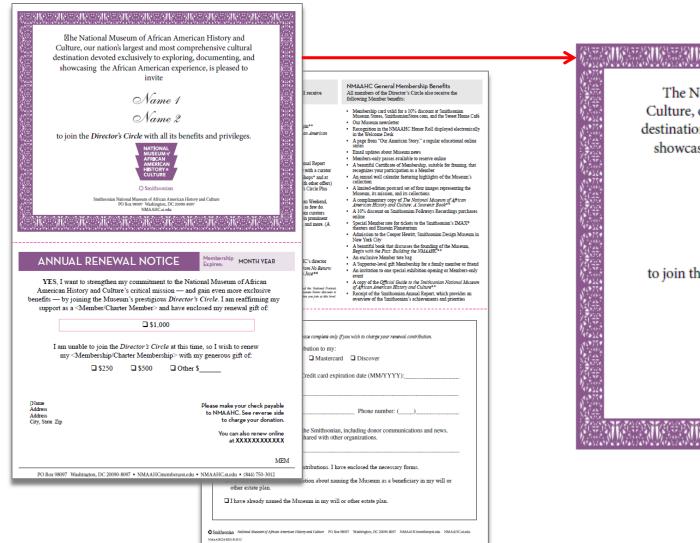


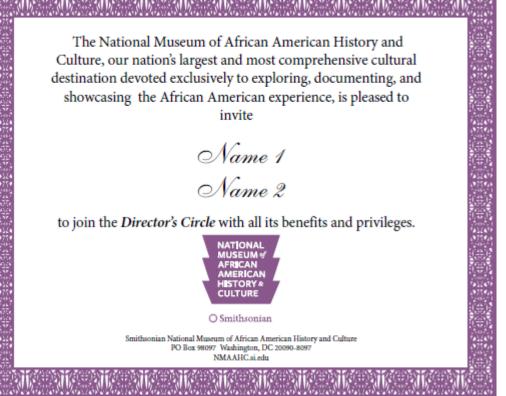
### Renewal with Targeted Upgrade

### NMAAHC R1 Upgrade Package



### NMAAHC R1 Upgrade Package





### Renewal with Targeted Upgrade

I also hope that you will consider strengthening your commitment to the arts by renewing at the Principal level of Membership with a gift of \$1,000—or even elevating your support to the Patron Circle level with a contribution of \$1,800.

Increasing your Membership support will magnify your impact on the performing arts while bringing you even more exclusive perks and privileges to enhance every Kennedy Center experience.

So please renew your Membership today—at a higher level if possible—because the Kennedy Center truly depends on our Members!



<DATE>

<NAME>
<STREET 1>
<STREET 2>
<CITY, STATE ZIP>

Dear < INSIDE SAL>,

On behalf of everyone at the Kennedy Center, I want to thank you for your steadfast commitment to our nation's cultural center and the performing arts.

Your Membership support makes it possible to present our spectacular 2024–2025 season, featuring a wide variety of performances for every interest and taste—including outstanding musical theater like *Parade* ... mesmerizing dance from world-class companies such as the Birmingham Royal Ballet ... beloved classical works and new masterpieces presented by the National Symphony Orchestra ... and Washington National Opera's awe-inspiring production of *The (R-)evolution of Steve Jobs* and more!

You also help to entertain, uplift, and inspire audiences in exciting new ways through innovative free programming, new initiatives that ensure the arts remain accessible to all, the Kennedy Center's treasure trove of digital programming, and empowering education initiatives

NAME, because you are such a treasured part of the Kennedy Center family, I am writing to let you know that your Sponsor Membership and exclusive benefits are due to expire soen. I urge you to renew your Membership today to make the most of our 2024–2025 season—through special benefits like Members-Only Ticket Priority, which lets you purchase tickets for the best seats before they go on sale to the public.

I also hope that you will consider strengthening your commitment to the arts by renewing at the Principal level of Membership with a gift of \$1,000—or even elevating your support to the Patron Circle level with a contribution of \$1,800.

Increasing your Membership support will magnify your impact on the performing arts—while bringing you even more exclusive perks and privileges to enhance every Kennedy Center experience

So please renew your Membership today—at a higher level if possible—because the Kennedy Center truly depends on our Members!

(over, please)



### Renewal with Targeted Upgrade

#### I'd like to increase my Membership support:

- ☐ YES, I want to enhance my Membership by increasing my gift to the \$1,000 Principal level, which includes all of the benefits listed above plus:
  - ★ Invitation to purchase event passes to the Kennedy Center July 4th Celebration
  - ★ Priority invitation to purchase event passes to major special events at the Kennedy Center
  - \* Redeemable voucher for a collectable Kennedy Center Souvenir Cup (available with beverage purchase)
  - ★ A fourth invitation to a NSO Working Rehearsal for you and a guest
- YES, I want to enhance my Membership by increasing my gift to the \$1,800 Patron Circle level, which includes all of the benefits listed above plus:
  - ★ Admittance to the Circles Lounges at the Opera House, Concert Hall, and Eisenhower Theater, offering complimentary beer, wine, and snacks
  - ★ Recognition in the program for all Kennedy Center performances
  - ★ Invitation to one Circles Signature Event for you and a guest
  - ★ Priority seating in the Roof Terrace Restaurant
  - ★ Special rates and discounts at Washington-area hotels and restaurants
  - ★ Invitation to one WNO Dress Rehearsal for you and a guest



#### Annual Membership Renewal

TO: Membership Office

The John F. Kennedy Center for the Performing Arts

Washington, DC 20566

From: <NAME>

<STREET 1> <STREET 2> <CITY. STATE ZIP> <DONOR ID>

3/8 inch

I accept your invitation to renew my annual Membership to the John F. Kennedy Center for the Performing Arts. To enhance my Kennedy Center experience, and in support of all your important programs, I am renewing at the following level:

#### I'd like to renew at my current level:

- ☐ YES, I'd like to renew my Membership at the \$700 Sponsor level and continue to receive these benefits:
- ★ Reduced service fees on ticket purchases for Kennedy Center performances (some exclusions may apply)
- ★ Invitation to the President's Annual Meeting for you and a guest
- \* Access to the Priority Waitlist for up to two tickets to the Kennedy Center Honors
- ★ Invitation to a Backstage Experience for you and a guest
- ★ Access to a reserved seating section for WNO's Opera in the Out ield®
- \* Eligibility to use the Preferred Access Ticket Line
- \* A third invitation to a NSO Working Rehearsal for you and a guest

#### I'd like to increase my Membership support:

- YES, I want to enhance my Membership by increasing my gift to the \$1,000 Principal level, which includes all of the benefits listed above plus:
- ★ Invitation to purchase event passes to the Kennedy Center July 4th Celebration
- \* Priority invitation to purchase event passes to major special events at the Kennedy Center
- \* Redeemable voucher for a collectable Kennedy Center Souvenir Cup (available with beverage purchase)
- \* A fourth invitation to a NSO Working Rehearsal for you and a guest
- YES, I want to enhance my Membership by increasing my gift to the \$1,800 Patron Circle level, which includes all of the benefits listed above plus:
  - $\bigstar$  Admittance to the Circles Lounges at the Opera House, Concert Hall, and Eisenhower Theater, offering complimentary beer, wine, and snacks
- \* Recognition in the program for all Kennedy Center performances
- ★ Invitation to one Circles Signature Event for you and a guest
- ★ Priority seating in the Roof Terrace Restaurant
- ★ Special rates and discounts at Washington-area hotels and restaurants
- ★ Invitation to one WNO Dress Rehearsal for you and a guest

#### Please select which Kennedy Center program you would like to support with your Membership gift:

- ☐ All Kennedy Center Programs ☐ Ballet and Dance Programs
- ☐ Washington National Opera
- National Symphony Orchestra
- Kennedy Center Education
- . . .

Please indicate your method of payment on reverse side.

THE JOHN F, KENNEDY CENTER FOR THE PERFORMINGARTS | WASHINGTON, DC 20566 | (202) 416-8310 | KENNEDY-CENTER.O



### Stand Alone Upgrade Campaign

### **Invitation Package**



**Exclusive Invitation Enclosed** 

Attention Charter Member:

<Name>

<Address1> <Address2>

<City, State Zip>



#### **DIRECTOR'S COUNCIL OF FRIENDS**

#### INVITATION ACCEPTANCE FORM

Office of the Director National Museum of the American Indian

> Firstname Lastname XXXXXXX Firstname Lastname XXXXXXX Address Line 1 XXXXXXXXXX Address Line 2 XXXXXXXXXX City, State Zip



ID# / Source Code MEM

☐ Yes, I accept your invitation to join the *Director's Council of Friends* and increase my commitment to the museum's efforts to foster a more informed understanding of Native

Enclosed is my gift at the following level:

Director's Council of Friends

- ☐ \$1,250 (or \$625 semiannually, \$312.50 quarterly, \$104.17 monthly)
- ☐ \$3,000 (or \$1,500 semiannually, \$750 quarterly, \$250 monthly)

- ☐ \$5.000 (or \$2,500 semiannually, \$1,250 quarterly, \$416.67 monthly)
- ☐ I cannot join the *Director's Council of Friends* at this time, but I want to support the museum's mission with a tax-deductible gift of \$\_

To join online, please visit http://go.si.edu/dcof-join or scan the QR code above. SMITHSONIAN INSTITUTION | PO Box 23473 | Washington, DC 20026-3473 | www.AmericanIndian.si.edu | NMAIDCOF@si.edu

- ☐ I have enclosed a check for my entire donation of \$\_\_\_\_ made payable to NMAI. ☐ Please charge the credit card provided below for the donation as indicated. ☐ Mastercard ☐ Visa ☐ American Express ☐ Discover \_\_\_ one time semiannually quarterly monthly
- ☐ I prefer to make a donation via bank transfer (Membership Payment Plan Only)—SEE REVERSE
- ☐ I do NOT wish to receive any benefits, as I want my gift to be 100% tax-deductible
- ☐ Yes, my employer matches contributions. I have enclosed the necessary forms.
- ☐ Yes, I want to receive emails from the Smithsonian, including membership communications and news. My email address is:

ID # Source Code MEM GIFT



BENEFITS OF MEMBERSHIP

This is your opportunity to deepen your connection to the museum while enjoying exclusive benefits and privileges. Join as a Director's Council of Friends

Special Invitation

As the National Museum of the American Indian moves into its third secade, I am especially grateful for your support as a [Charter member/value It's been my honor to grow alongside the museum over the past two It's been my honor to grow alongsise the museum over the past two does not be the more than the most of the most of the most of the museum's purposed in the museum's purpose, Since you first git in \text{\text{The Girble last yearl, you've} helped reconstruct cultural maratises to include helgenous perspectives; tosted a more informed understanding of Native peoples, histories, and cultures; and inspire people with the beauty, resilience, and richness of indigenous cultures. In recognition of your commitment to our mission, I invite you to join the Director's Council of Friends—our most prestigious membership circle— composed of a select group of individuals who share our vision and appreciate a heightened level of involvement within the museum.

[Name], your outstanding generosity leads me to believe that you are an ideal candidate for membership in the Director's Council of Friends, which is available to those who make annual gifts of \$1,250 or more.

Celebrating Our Progress

Twenty years ago, the museum opened its doors on the National Mail with

Society with an extra-generous gift of \$5,000 or more. This especially sedicated group of members holds a leading role in shaping our vision of a world with greater understanding, empathy, and justice. Luminaries and Director's Council members are true stakeholders in the eum's current and future success, and are extended a variety of exclusive benefits and opportunities befitting that important status. Most importantly, they help advance all our meaningful work in pursuit of the museum's mission



- An exclusive Director's Council welcome kit
- A 20% discount in NMAI and Smithsonian stores\*

ortant group of supporters.

- A \$500/per person discount off one Smithsonian
- Informative NMAI publication Do All Indians Live In Tipis? Questions & Answers from the National Museum of the American Indian

#### 3,000-\$4,999.99

of the above, plus cognition in and a copy of the Smithsonian's ual Report

ing silver lapel pin, custom-designed by wned artisan Ray Tracey (Navajo) embership in the Sky Meadows Circle for

eum's online programs bring ng I love about visiting into . It makes me happy knowing pport as a Director's Council allowing expanded access to events, and special programs



To take your membership to the next level, join as a Luminary Society member to receive:

#### LUMINARY SOCIETY

#### \$5,000+

- Exclusive Luminary Society welcome packet Invitation to the annual Luminary Society appreciation event
- Direct access to Luminary Society liaison for personalized assistance (museum visits, membership support, additional resources,
- Annual Luminary Society gift pack featuring a museum book or other item specially selected for Luminary Society members
- VIP invitation to exhibition openings and selected special events (two)
- Museum IMPACT Report detailing key programs and museum accomplishments made possible through philanthropic gifts
- Annual recognition in American Indian
- magazine's Luminary Society donor page Listing in the Smithsonian Institution Annual

All members of the Director's Council of Friends and Luminary Society also receive general member benefits. For more information about additional levels of giving, please visit American Indian. si.edu/support/membership



### **Invitation Package**

In recognition of your commitment to our mission, I invite you to join the Director's Council of Friends—our most prestigious membership circle—
composed of a select group of individuals who share our vision and appreciate a heightened level of involvement within the museum.

[Name], your outstanding generosity leads me to believe that you are an ideal candidate for membership in the *Director's Council of Friends*, which is available to those who make annual gifts of \$1,250 or more.



#### **Special Invitation**

[Date]

Dear [Name],

As the National Museum of the American Indian moves into its third decade, I am especially grateful for your support as a [Charter member/valued member].

It's been my honor to grow alongside the museum over the past two decades. Today, it's my pleasure to recognize the important role you've played in the museum's journey. Since your first gift in [YOFG/the last year], you've helped reconstruct cultural narratives to include Indigenous perspectives; foster a more informed understanding of Native peoples, histories, and cultures; and inspire people with the beauty, resilience, and richness of Indigenous cultures.

In recognition of your commitment to our mission, I invite you to join the Director's Council of Friends—our most prestigious membership circle—composed of a select group of individuals who share our vision and appreciate a heightened level of involvement within the museum.

[Name], your outstanding generosity leads me to believe that you are an ideal candidate for membership in the *Director's Council of Friends*, which is available to those who make annual gifts of \$1,250 or more.

You can also deepen your commitment further by joining our *Luminary Society* with an extra-generous gift of \$5,000 or more. This especially dedicated group of members holds a leading role in shaping our vision of a world with greater understanding, empathy, and justice.

Luminaries and Director's Council members are true stakeholders in the museum's current and future success, and are extended a variety of exclusive benefits and opportunities befitting that important status. Most importantly, they help advance all our meaningful work in pursuit of the museum's mission.

#### **Celebrating Our Progress**

Twenty years ago, the museum opened its doors on the National Mall with

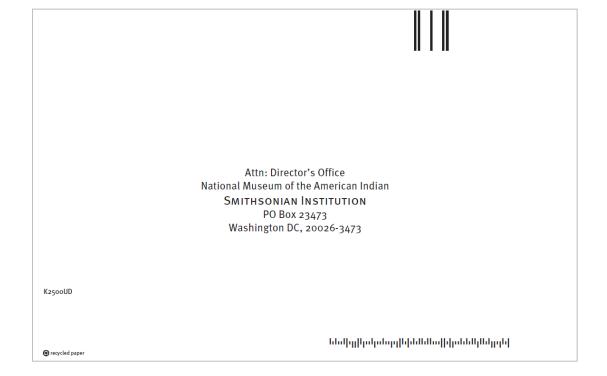
(over, please)

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### **Invitation Package**

■ Yes, I accept your invitation to join the *Director's Council of Friends* and increase my commitment to the museum's efforts to foster a more informed understanding of Native peoples and cultures.





#### **DIRECTOR'S COUNCIL OF FRIENDS**

#### INVITATION ACCEPTANCE FORM

o: Office of the Director

National Museum of the American Indian

From: Firstname Lastname XXXXXXX

Firstname Lastname XXXXXXX Address Line 1

XXXXXXXXXX Address Line 2

XXXXXXXXXX City, State Zip



ID# / Source Code MEM

Yes, I accept your invitation to join the <i>Director's Council of Friends</i> and increase my
commitment to the museum's efforts to foster a more informed understanding of Native
neonles and cultures

#### Enclosed is my gift at the following level:

Director's Council of Friend	Director's	Council o	of Friends
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- □ \$1,250 (or \$625 semiannually, \$312.50 quarterly, \$104.17 monthly)
- □ \$3,000 (or \$1,500 semiannually, \$750 quarterly, \$250 monthly)

#### **Luminary Society**

- □ \$5,000 (or \$2,500 semiannually, \$1,250 quarterly, \$416.67 monthly)
- ☐ I cannot join the *Director's Council of Friends* at this time, but I want to support the museum's mission with a tax-deductible gift of \$

To join online, please visit http://go.si.edu/dcof-join or scan the QR code above.

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#### **PAYMENT OPTIONS**

☐ Mastercard	e credit card provided below for the donation as indicated.  ☐ Visa ☐ American Express ☐ Discover
Amount:	one time semiannually quarterly monthly
Card No.:	Expiration Date:
Signature:	Email:
☐ I prefer to make	a donation via bank transfer (Membership Payment Plan Only)—SEE REVERSE
☐ I do NOT wish to	receive any benefits, as I want my gift to be 100% tax-deductible.
☐ Yes my employe	r matches contributions. I have enclosed the necessary forms.
- 105, my cmp.oyc	
	eive emails from the Smithsonian, including membership communications and news

### **Stand Alone Upgrade**

### Tripplett

Dear Fellow Smithsonian Member.

My road to the James Smithson Society began more than 30 years ago when one of my colleagues told me that if I wanted to advance my career I should subscribe to Smithsonian Magazine. I took that advice. I'll never know for sure if it helped me professionally—but personally, it spurred me to continue my pursuit of knowledge and discovery, engage more deeply with the Smithsonian and support the Institution as a James Smithson Society member.

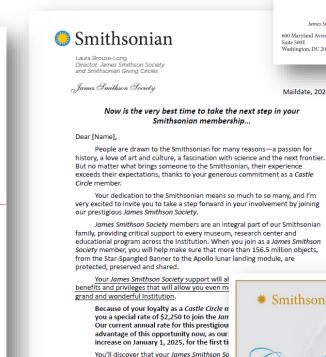
The Smithsonian helps people from all walks of life explore brand new things and even re-explore things they thought they already knew. That's especially apparent in the new National Museum of African American History and Culture. The Museum tells the whole story, even when it isn't easy for people to hear. When I visited, I could see the raw emotion on people's faces as they toured the galleries. It was very meaningful to think that as a James Smithson Society member, I've helped make it possible for so many individuals to immerse themselves in this important history.

As a Smithson Society member, I feel the wonder of this immersion for myself. Every year I look forward to traveling to D.C. to take part in the Annual Smithsonian Veekend. It's my chance to meet others who love learning as I do while I enjoy behind-the-scenes experiences and special events.

No matter how you first engaged with the Smithsonian, I'm certain you'll find ning the James Smithson Society is one of the best decisions you will ever make. The tment is generous, but the rewards are even greater.

rry Tripplett

ithson Society Member, San Mateo, California



Smithsonian

worthy investment. Not only will you help the Sm

its reach, but you will also set yourself up to enjoy

may have only imagined before. We take recognize supporters very seriously, from inviting you to exc

PO Box 37012, MRC 712 • Washington, DC 20013-7012 • mei

Now is the very best time to take the next step in your Smithsonian membership...

Laura Brouse-Long Director, James Smithson Society and Smithsonian Giving Circles

James Smithson Society

Laura Brouse-Long

Smithsonian Institution James Smithson Society & Smithsonian Giving Circles

600 Maryland Avenue, SW Washington, DC 20024-2520 E-mail: BrouseLongL@si.edu www.smithsonsociety.org

James Smithson Society Stewards of a Nation's Heritage

securely online at: go.sl.edu/newjss

Membership Reply

[NAME]

Test I am proud to join the prestigious James Smithson Society, a very special group of individuals committed to helping the Smithsonian inspire knowledge and learning in every corner of the country and every part of the world. I have enclosed my membership contribution, and I look forward to enjoying the many exclusive benefits and privileges of membership.

□ \$2,500 \$2,250\*

☐ \$5,000 \$4,750\*

□ \$10,000 \$9,500\*\* □Founder's Circle \$25,000\*\*

□Founder's Circle \$50,000\*\*

\*Join within 10 days to receive this special offer before our membership rates increase on January 1

\*\*Your gift in these membership levels will be recognized in programs during the Annual Smithsonian

Weekend, May 2-3, 2025.

To make my contribution go even further, I would like my full gift to go to the Smithsonian. I decline all benefits, including special members-only event invitations, and understand my gift will be fully tax-deductible.

☐ I am unable to commit to the James Smithson Society at this time but still want to support the Smithsonian's mission. Enclosed is my special tax-deductible gift of:

ent will allow you to be ewsletter. Thank you!





☐ I prefer to make my gift by credit card (please see information on reverse side).

☐ I prefer to fulfill my membership dues by making my gift through a monthly or quarterly credit card pledge or with gifts of securities (please see reverse side).
your special contribution in the enclosed envelope to ensure that your gift reaches us.

ank you for your exceptional generosity.

Smithsonian

37012, MRC 712 | WASHINGTON, DC 20013-7012

1234567890 1234567890123456789 0

James Smithson Society Your generosity is helping keep the Smithsonian a national treasure.

\* Smithsonian

Certificate of Appreciation

The Smithsonian Institution is pleased to recognize

**DONOR NAME** 

-as a member of the-

Charlotte Gaither

Smithsonian

0

### **Eye-Catching Carrier**



PO BOX 37012, MRC 712 WASHINGTON, DC 20013-7012

**DELIVER TO:** 

Ms. Jane Reallylonglastname 123 Address1 Address2 City, State, 12345-6789





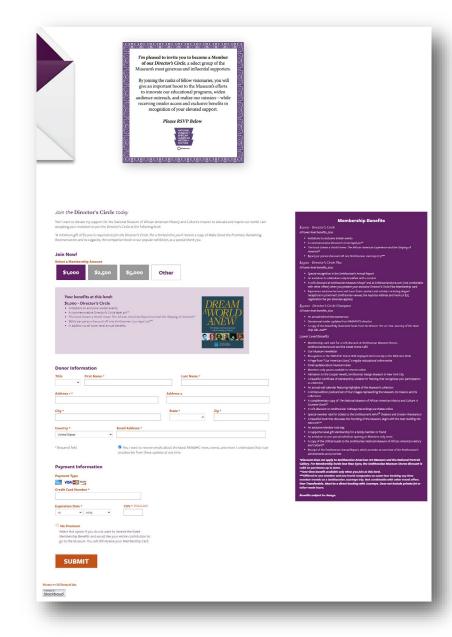


### **Upgrade with Premium**

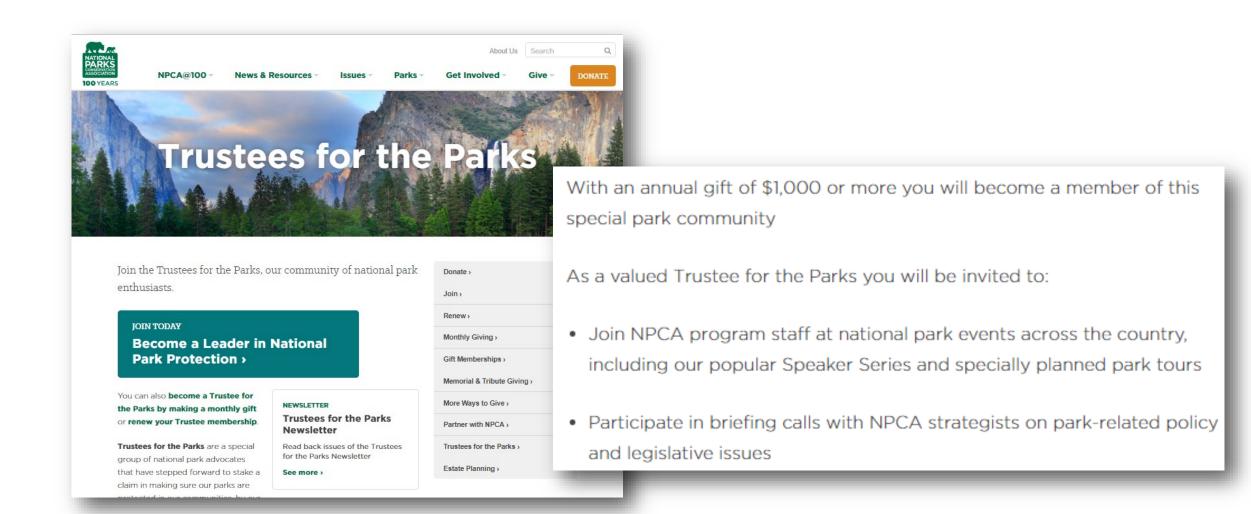


#### **Other Communication Channels**

### **Engaging Email Conversion**



### **Ensure Web Donation Page Promotes Upgrading**



### Telemarketing for Personalized Upgrade Ask

#### SECTION ONE: INTRODUCTION AND PRESENTATION

#### Introduction

Hello, may I please speak with Mr./Ms. National Museum of the American Indian. My name is being recorded for quality.

As the National Museum of the American Indian moves in grateful for your support (as a Charter member). The muse your unwavering commitment.

#### Presentation & First Ask

I'm calling today because you've helped reconstruct cultu perspectives; foster a more informed understanding of Nat inspire people with the beauty, resilience, and richness of

prestigious membership circles—composed of a select gro

extended a variety of exclusive benefits and opportunities importantly, they help advance all our meaningful work in

You'll be invited to experience our extraordinary exhibits. through special engagements with experts, curators, and personalized tours to exclusive collections access, there w inspiring waiting for you.

Will you deepen your commitment to the museum by joining Council of Friends] with a membership contribution of [\$50]

\_first and last I'm calling today because you've helped reconstruct cultural narratives to include Indigenous perspectives; foster a more informed understanding of Native peoples, histories, and cultures; and inspire people with the beauty, resilience, and richness of Indigenous cultures.

In recognition of your commitment to the museum's mission, we're inviting you to join our most prestigious membership circles—composed of a select group of individuals who share our vision and appreciate a heightened level of involvement within the museum.

These members are true stakeholders in the museum's current and future success and are In recognition of your commitment to the museum's missid extended a variety of exclusive benefits and opportunities befitting that important status. Most and appreciate a heightened level of involvement within the importantly, they help advance all our meaningful work in pursuit of the museum's mission.

These members are true stakeholders in the museum's cu You'll be invited to experience our extraordinary exhibits, collections, events, and programs through special engagements with experts, curators, and leadership staff and volunteers. From personalized tours to exclusive collections access, there will always be something new and inspiring waiting for you.

> Will you deepen your commitment to the museum by joining the [Luminary Society/Director's Council of Friends] with a membership contribution of [\$5000/\$3000] today?

\*And to make this more convenient, you can break this into semi-annual, quarterly, or monthly payments.



### **Expanding Opportunities: DAFs/IRAs & Planned Giving**

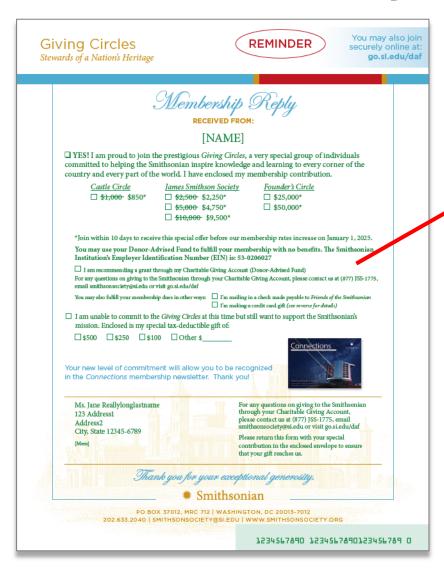
# Introducing DAFs and IRAs to Midlevel Donors

- Breaking misconceptions:
   DAFs and IRAs aren't just for major donors
- How to encourage and facilitate gifts

# Planned Giving: Planting the Seed Early

- Why midlevel donors are prime prospects
- Simple ways to introduce planned giving in membership appeals

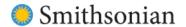
### Offer DAFs as a Payment Channel



You may use your Donor-Advised Fund to ful Institution's Employer Identification Number	fill your membership with no benefits. The Smithsonian (EIN) is: 53-0206027
☐ I am recommending a grant through my Charitable For any questions on giving to the Smithsonian through email smithsonsociety@si.edu or visit go.si.edu/daf	Giving Account (Donor-Advised Fund)  your Charitable Giving Account, please contact us at (877) JSS-1775,
You may also fulfill your membership dues in other ways:	☐ I'm mailing in a check made payable to Friends of the Smithsonian ☐ I'm making a credit card gift (see reverse for details)



### Recognize DAF Donors and Personalize Ask String



Laura Brouse-Long Director, James Smithson Society and Smithsonian Giving Circles



Maildate, 2024

Now is the very best time to take the next step in your Smithsonian membership...

RSVP today.

Dear [Salutation],

It's a busy month at the Smithsonian as we get ready for another year of sharing history, art, science and culture with the world. I know you'll want to be a part of all that you can in 2025. That is why I wanted to remind you of the letter I sent last month inviting you to take a step forward in your support by joining the *Giving Circles*.

I hope you've been considering this exciting opportunity to join the *Giving Circles*, which include members who make gifts of \$1,000 or more to the Smithsonian. Remember, we are offering you a special rate of \$850 to join the *Castle Circle* or \$2,250 to join the *James Smithson Society* through this invitation. Take advantage now as a rate increase will take effect on January 1, 2025, for the first time in nearly 20 years.

We are so thankful for the compassion and dedication you've shown us in the past by contributing through your charitable giving account (Donor Advised Fund). Please consider putting your charitable dollars to work once again by initiating a grant recommendation to the Smithsonian and joining our Castle Circle or James Smithson Society.

While every year offers new things to discover at the Smithsonian, 2025 is shaping up to be especially inspiring. Art enthusiasts won't want to miss *Unbound: Narrative Art of the Plains* on view at the National Museum of the American Indian. *Unbound* juxtaposes historical hides, muslins and ledger books with more than 50 contemporary works. It's a vibrant celebration of narrative art among Native nations of the Great Plains.

Through exhibitions like *Unbound*, the Smithsonian connects visitors with diverse people and cultures, past and present. The Smithsonian also brings

(over, please)

We are so thankful for the compassion and dedication you've shown us in the past by contributing through your charitable giving account (Donor Advised Fund). Please consider putting your charitable dollars to work once again by initiating a grant recommendation to the Smithsonian and joining our Castle Circle or James Smithson Society.



### Added Push for DAF and IRA Gifts on Back of Reply

□ Encl	osed is my check (made payable to the Smiti	hsonlan'	for \$		
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	Monthly installments in the increments listed	below:			
	\$ per month for	month	s (from 2-12 months)	).	
п	Four quarterly installments as indicated belo				
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□ I pref	er to remain anonymous.				
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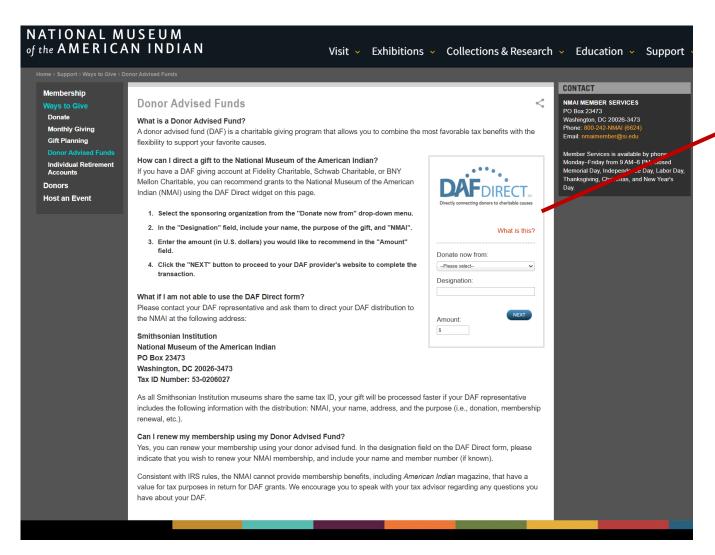
#### DONOR-ADVISED FUNDS AND INDIVIDUAL RETIREMENT ACCOUNTS

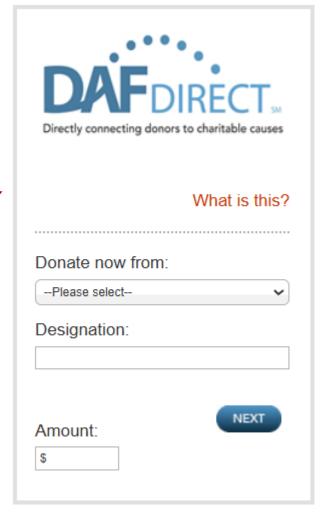
The Smithsonian welc<mark>omes your gifts from Donor-Advised Funds and In</mark>dividual Retirement Accounts. To help in ensuring that your gift aligns with IRS tax requirements, no membership benefits will be provided in connection with donations made through these giving vehicles. The Smithsonian Institution's Employer Identification Number (EIN) is: 53-0206027.

Be sure to note that benefits cannot be fulfilled for DAF and IRA gifts!



### **DAF** Widget for Website





Widgets for registered charities:

DAFwidget.com (Free!)
DAFDirect.org (Free!)

**Chariot (embedded in website)** 

### Planned Giving: Planting the Seed Early

Midlevel Donors as Prime Prospects

- Potential for significant contributions
- Often have a strong connection to the cause

Introducing Planned
Giving in Membership
Appeals

- Simple and effective methods
- Encourages long-term commitment

### **Promote Planned Giving in Appeals**

### Museum of Fine Arts, Boston Museum of Fine Arts, Boston 465 Huntington Avenue, Boston, MA 02115

Mr. and Mrs. John Q. Samplelonglastname 1234 Main Street Address Line 2 Anytown, US 12345-6789

donor ID source code

Make the most of the 2024-2025 MFA Season!

#### **Membership Activation Confirmation**

- planned this season. To enjoy the Museum as an insider and support its mission to help all of Boston grow, celebrate, and connect through art, I'm enclosing a generous gift at the following membership level:
  - □ Individual\$90

- □ Advocate\$1,200
- □ Friends and Family \$140
- □ Patron \$3,000
- □ Ambassador \$300
- □ Other \$

Please see reverse for membership levels and benefits information.

- ▶ Please return this form in the enclosed envelope.
- ► Please make your check payable to Museum of Fine Arts, Boston.
- ▶ If you wish to charge your contribution, please see reverse.
- ► Help your gift get to work faster. Give online at mfa.org/membership or scan this QR code.



☐ My employer will match my gift, and my company's official gift matching form is enclosed.

Company Name

- □ Iwould like to learn more about options for including the MFA in my estate plans, such as a will, trust, or retirement account.
- □ I have included MFA Boston in my estate plans. Please include me in the Sargent Society.

- □ Iwould like to learn more about options for including the MFA in my estate plans, such as a will, trust, or retirement account.
- □ I have included MFA Boston in my estate plans. Please include me in the Sargent Society.

### Final Takeaways - Building a Thriving Midlevel Pipeline

Midlevel donors are essential bridges between annual and major giving.

Personalized
engagement and
clear upgrade
strategies drive longterm value.

Data segmentation and multichannel outreach are key to growth.

Every member has the potential to become a major donor—start cultivating now.

### **Q&A / Open Discussion**







David Saunders
Director Membership,
National Museum of the
American Indian
saundersdf@si.edu



Colleen Morith
Assistant Director,
Smithsonian Giving Circles
morithc@si.edu



Dara Igersheim
Vice President of Client
Services
darai@avalonconsulting.net

### Contact us with questions!