

DMFA 2026 Mid-Level Giving Data Request Form: Performance Metrics

Purpose

Collect data for **calendar years 2024–2025** and relevant historical data to complete the *Performance Metrics* section of the DMFA Mid-Level Benchmarking Survey.

This information will be used to calculate key giving and retention metrics for benchmarking and analysis across participating organizations.

Organizational Donors & Revenue

This section focuses on organizational donors and revenue. “Organizational” includes total contributions from all sources - individuals, foundations, and corporations - across all channels, such as online, events, and direct mail. It covers all purposes, including general, designated, and restricted funds, providing the broadest measure of giving

- a. **How many active organizational donors (across all programs) did your organization have in calendar year 2025?**

Total count of all donors from January 1, 2025 - December 31, 2025.

- b. **What is the total organizational revenue in calendar year 2025?**

Total revenue generated from January 1, 2025 - December 31, 2025.

- c. **How many active organizational donors (across all programs) did your organization have in calendar year 2024?**

Total count of all donors from January 1, 2024 - December 31, 2024.

- d. **What is the total organizational revenue in calendar year 2024?**

Total revenue generated from January 1, 2024 - December 31, 2024.

Direct Marketing Donors & Revenue

This section focuses on direct marketing donors and revenue. "Direct Marketing" refers to a subset of organizational giving, capturing contributions and donors acquired through targeted channels such as direct mail, email, telemarketing, and digital advertising. This includes giving by general and Mid-level donors and any major or other donors giving in response to direct marketing efforts. Gifts by corporations/foundations, major gifts, and other revenue outside of direct marketing (such as events) should not be included.

- a. **What is the total Direct Marketing revenue for your organization in calendar year 2025?**

Total revenue generated from direct marketing efforts from January 1, 2025 - December 31, 2025.

- b. **How many Direct Marketing donors did your organization have in calendar year 2025?**

Total number of donors who contributed through direct marketing from January 1, 2025 - December 31, 2025

- c. **What is the total Direct Marketing revenue for your organization in calendar year 2024?**

Total revenue generated from direct marketing efforts from January 1, 2024 - December 31, 2024.

- d. **How many Direct Marketing donors did your organization have in calendar year 2024?**

Total number of donors who contributed through direct marketing from January 1, 2024 - December 31, 2024

2025 Mid-level Giving

This section gathers key data on your mid-level donors and revenue in 2025, including donor counts, gift totals, and giving patterns.

- a. **What was the TOTAL number of MID-LEVEL in calendar year 2025?**

Total count of unique individuals who donated at the Mid-level in calendar year 2025

- b. **What was the number of NEW, FIRST-YEAR MID-LEVEL DONORS in calendar year 2025?**

Count of donors who qualified as Mid-level for the first time in 2025 (include new donors incepting at Mid-level and current donors upgrading to Mid-level for the first time)

- c. **What was the TOTAL number of MID-LEVEL DONORS who were new in 2024 and renewed their giving in 2025?**

Count of Mid-level donors acquired in 2024 who gave at the Mid-level in both 2024 and 2025

- d. **What is the TOTAL number of MULTI-YEAR CONSECUTIVE MID-LEVEL DONORS in calendar year 2025?**

Total number of donors who gave in three consecutive years (2023, 2024, and 2025)?

- e. **What was TOTAL REVENUE for the MID-LEVEL PROGRAM in calendar year 2025?**

Sum of all donations received at the Mid-level in calendar year 2025

- f. **What was the TOTAL number of MID-LEVEL DONORS in calendar year 2025?**

Count of all donation transactions received at the Mid-level during calendar year 2025

2024 Mid-level Giving

This section gathers key data on your mid-level donors and revenue in 2024, including donor counts, gift totals, and giving patterns.

- a. **What was the TOTAL number of MID-LEVEL DONORS in calendar year 2024?**
Total count of unique individuals who donated at the Mid-level in calendar year 2024

- b. **What was the number of NEW, FIRST-YEAR MID-LEVEL DONORS in calendar year 2024?**
Count of donors who qualified as Mid-level for the first time in 2024) include new donors incepting at Mid-level and current donors upgrading to Mid-level for the first time).

- c. **What was the number of MULLTI-YEAR MID-LEVEL DONORS in calendar year 2024?**
Count of donors who have given at the Mid-level in at least one previous year and also donated in calendar year 2024

- d. **What was TOTAL REVENUE for the MID-LEVEL PROGRAM in calendar year 2024?**
Sum of all donations received at the Mid-level in calendar year 2024

- e. **What was the TOTAL NUMBER of MID-LEVEL DONORS in calendar year 2024?**
Count of all donation transactions received at the Mid-level during calendar year 2024

Sustainers & Special Fund Revenue

- a. **Do you recognize or include sustainer donors in your Mid-level program?**

[Y/N]

- Yes
- No *[Organizations without sustainer donors will skip to question c]*

- b. **What was the total revenue from Mid-level sustainers for calendar year 2025?**

- c. **What was the total revenue from Donor-Advised Funds for calendar year 2025?**

- d. **What investments did your organization make in Donor-Advised Funds strategies for calendar year 2025?**

[Multi-select checkboxes]

- Technology to identify likely DAF donors
- Hire external firm or marketing partner
- Include DAF specific language in Mid-level appeals
- Created DAF specific revenue and/or donor goals for Mid-level
- We have not made any investment
- Other *[Open text]*

- e. **What was the total revenue from IRA contributions for calendar year 2025?**