Assessing Your Readiness for a Major Gifts Program

We believe there are several "keys to success" when launching and managing a major gifts program. Ensuring you have all your systems and processes in place will allow your program to be grounded in a solid foundation and be designed to support the major gifts pipeline. This assessment will cover various areas that will help you and your organization understand its readiness to start a major gifts program and help you identify areas of focus for enhancement.

In the following sections, rate your organization 1-5 according to the following guide:

> 1 – No, we do or have **not**
> 2 – We do or have **a tiny bit**
> 3 – **Sometimes** we do or have
> 4 – We **mostly** do or have
> 5 – We **definitely** do or have.

For Yes/No questions: 1 = No, 5 = Yes.

There may be a question that is outside your knowledge. If it relates to an area in which you personally don't work, or perhaps you're new - rather than leaving an item blank, enter "3," which is the average score.

Tally up each section as you go along. There is a final tally sheet on the last page.

Remember, the point of this document is to help you identify areas on which to work, focus, and discuss. And we are here to walk you through what you need to do for each of these categories. So, be honest with yourself, be open to where this assessment leads, and know that we've got your back!

Section A: Need for a Major Gifts Program

Before you start a major gifts program, it is important to assess your overall need. This will not only advise you on caseload needs, hiring, and areas of focus, but will also instruct on potential timelines for implementation.

1   Do you currently have a Major Gifts Program? (Y/N)

2   Do you have an active, functioning direct response/annual giving program? (Y/N)   _____

3   Do you have an active donor acquisition program that is delivering more donors than you are losing each year? (Y/N)   _____

4   Do you have at least 500 active donors who have given $1000+ cume in the last 24 months" (Y/N)   _____

Section A Total: _____

Section B: Program Set-Up

Getting the foundation right for a successful major gifts program involves a lot of people, discussions, and components.

1   We have identified in which department the program will reside. For example, it will be part of the Fundraising or Direct Response department.   _____

2   We have written up a scope of work and job description for the Major Gift Officer role.   _____

3   Major Gift Officers will be **solely** focused on working with a qualified caseload of not more than 150 donors.   _____

4   Our Finance and Program teams are engaged and participating in the creation of donor offers for the major gifts staff.   _____

5   We have approval for at least half-time administrative support for each Major Gift Officer.   _____

6   We have secured the necessary budget to cover the operational needs of the Major Gift Officer(s), including visits and travel.   _____

7   We have determined the metrics and measurements that will be used to evaluate each Major Gift Officer and the program overall.   _____

Section B Total: _____

Section C: Data Systems

Understanding your data is paramount when developing a successful major gifts program. Without a clear understanding of certain areas, you are likely to come across obstacles and stumbling blocks that could have been avoided.

1	There is a donor software system in place that has a CRM application.

2	We understand the solicit codes/exclusion codes/constituent codes in our database.

3	We have identified which donors should be *excluded* from the major gifts program.

4	We have "clean" data that requires little attention before we start a program. For example, fundraiser coding, attributes and contact records are up-to-date.

5	We have a database that is free from issues with duplicate records.

6	We can easily identify donors that have a phone and/or email connected with their record.

Section C Total

Section D: Evaluating the Donor Pool

A clear understanding of the available donors and your goals for the major gift caseload pool is vital when launching a program. It will not only direct hiring decisions, i.e. number of major gift officers, but will also help you to understand what you can expect in terms of size and capacity with this program.

1	We have involved our Database Manager in producing a query of eligible donors for the major gifts caseload pool(s).

2	We have criteria established for creating our major gifts caseload pool.

3	We have identified our target giving range for the donor pool.

Section D Total

Section E: Evaluation and Metrics

Knowing how to correctly and efficiently track and report on your program will help you have a firm grasp on your progress. Ideally, this information will be built into your database

1	We can tack actions in your database.

2	We can differentiate between mass actions and individual donor actions. In other words, we can distinguish an action that is an email sent to 150 donors versus an email exchange between a single donor and the gift officer.

3	We can track mid-level donors after they move out of mid-level and into major gifts.

4   We can track how many donors have moved into major gifts through the mid-level program.

5   We can determine overall giving by major gifts caseload.

6   We can measure how the donors on a major gift officer's caseload last year are giving this year.

7   We can easily create and export reports weekly and monthly to show recent giving as well as year-to-date giving totals.

Section E Total _____

Section F: Systems for Successful Implementation

Getting the right systems, structure, and collateral materials in place is a key component for successful implementation of the major gifts program.

1   In collaboration with the Mid-Level team, we have established a system to move donors from mid-level to major gifts, including triggers.

2   We have a transition plan in place for a warm hand-off between mid-level and major gifts.

3   We have determined what how to respond when a donor wants to give. For example, whether the gift officer can process the gift themselves or will need to transfer the donor to a gift processing office.

4   We have <u>identified</u> the necessary collateral materials the Major Gifts Officer will need.

5   Our Major Gift Officers create individualized collateral and touch points in addition to what we provide for their donors.

6   Our Major Gift Officers have a 12-month plan of touch points and individualized goals created for each donor on their caseload.

7   We provide a budget (Including overhead needs) for each program need for our Major Gift Officers to share with donors.

Section F Total _____

Your Score

Total up all the numbers you assigned in your answers to each question:

Section	Score	Total Possible Score
A		20
B		35
C		30
D		15
E		35
F		35
Total:		170

How did you do? Let these categories be your guide:

- ☐ 34 to 69 Nowhere to go but up!
- ☐ 70-104 You're on the right track; look at specific areas to improve.
- ☐ 105 to 139 Things are looking good – you are almost there.
- ☐ 140 to 170 Amazing! Your organization is ready to rock and roll the mid-level program!

Possible Answers: 34

Top score: 170

After determining your overall score, examine each section. In which general areas (section A-F) is your organization doing well? And, in which general area(s) are there action items that will help prepare your organization for a major gifts program?

Now, dive deeper into each section (A-F). What are specific points for potential action? With whom can you discuss these outcomes, as well as ideas for improvement?

Finally, don't panic! A lot of preparation goes into a good major gifts program. We suggest that you anticipate it will take 4-6 months to prepare, depending on your organization and the data.