



HOW TO QUALIFY DONORS FOR  
YOUR MAJOR GIFTS PORTFOLIO

# WORKBOOK

Use a data-proven qualification method to ensure your major gifts caseload is filled with donors who want to engage and have a deeper relationship with your organization.





# Why Qualify?

We are frequently asked, “Why are you asking me to qualify donors?” There are three reasons:

1. Not every donor who meets your major gift criteria actually wants to relate to you.
2. You only have so much time.
3. You (and your organization) need to be wise stewards of the money that is being invested in you.

To break this down differently, you have two objectives and two realities to contend with as a Major Gifts Officers.

Two Objectives:

1. Creating meaningful, authentic relationships with your donors.
2. Raising revenue to support your organization’s programs.

Two Realities:

1. Some of the current donors on your caseload will go away.
2. New donors will surface who should be managed.

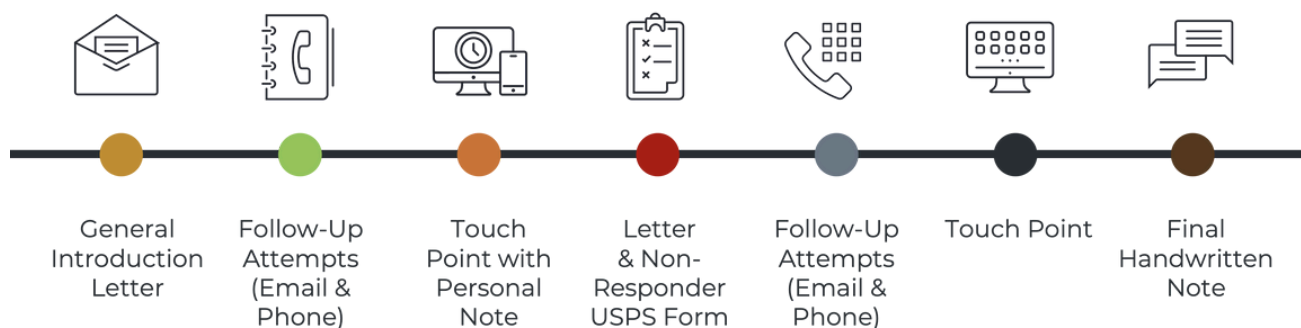




# The Veritus Qualification Method

This process is fairly labor-intensive, which means it will take months to complete. In fact, if you can qualify 5 donors per week, it will take approximately 7.5 to 8 months for you to have a fully qualified caseload, starting from scratch. But once you have it in place, your work will be so much more effective, efficient and enjoyable. Here's an overview of this process:

## The Veritus Qualification Method







# Writing Your Introduction Letter

The first step of the qualification process is to send an introduction letter. You'll begin by sending the introduction letter to a batch of approximately 20 caseload pool donors. We recommend a pace of no more than one batch per week. You may also have weeks when you need to pause on a new batch so you can stay on top of your communication schedule with donors that are already in the qualification process.

The purpose of this letter is simple: thank the donor for their partnership, share that you'll be their point of contact/representative, and let them know you'll be contacting them soon. Ideally, we recommend that this letter be sent via the mail, but if you only have the donor's email address, it can be sent as an email instead. The introduction letter should come directly from the fundraiser unless there's been recent turnover, in which case you can consider having the letter come from President/CEO/Executive Director, announcing and introducing the new MGO.



## Introduction Letter Sample



Date

Donor Name  
Street Name  
City, State, Zip

Hi Donor,

Thank you for your generous support of the American Cancer Society! Because of you, those facing a cancer diagnosis have more hope than ever. Cancer death rates are on the decline thanks to advances in research. You've helped save more than 3 million lives since 1991!

It's my pleasure to introduce myself as your personal contact at the American Cancer Society. My goal is to develop a stronger relationship with generous donors like you, who fund our mission. As your representative, I'm available to answer questions and provide information about programs or services we provide. You can contact me directly; my information is below. In addition, I will be sending you periodic updates to show you how your investment is making a difference and changing lives.

I'd love to learn more about your story and what inspires you to give to the American Cancer Society, because we could not accomplish our work without you. I'll be contacting you in the upcoming weeks. My call will not be a solicitation for support, but to get better acquainted. Also, included is a short questionnaire. Would you be willing to complete and return the form? This will help ensure you are receiving the information that is most important and meaningful to you.

Your commitment to the fight against cancer inspires me. I lost my father to cancer when I was 16 years old and I marvel at the selfless giving I see from people like you. You play a vital role in attacking cancer and allowing patients to celebrate more birthdays with their loved ones.

Thank you for partnering with us at the American Cancer Society and I look forward to speaking with you soon!

With appreciation,

(Signature)

Jennifer Mariucci  
American Cancer Society  
619-682-7440  
jennifer.mariucci@cancer.org



What we like:

Personal touch  
with highlighted  
area.





# Preparing for the Introduction Call

A week after the letter goes out, make a qualifying phone call. Be sure to manage the distance between the assumed in-home date of your letter and when you are making the call. Do not let too much time pass, as the letter will get “cold.”

The phone call has three objectives: (1) to introduce yourself as their point of contact at the organization; (2) to say ‘thank you’ for supporting the organization; and (3) to determine if the donor has interest in relating to you in a more personal way.

Remember, it’s very possible that your donor will feel concerned that you are calling to ask for money. Assure them right away what the purpose of your call is and that you are not asking for a gift. As you connect with the donor, listen for if they’re willing to engage in the conversation with you. If the donor is uninterested, be respectful and honor where the donor is.

If the phone doesn’t work, then try email.



# Introductory Call Structure

- **Connect** – Letting them know the purpose for the call
  - Thank them for their support
  - Introduce yourself (you are calling to follow up on the Introductory letter and to learn how best to serve them)
    - *Transition: Do you have a few minutes?*
- **Align** – Related to the giving history to affirm the donor's prior investment
  - Appreciate their long-time giving
  - Note if a monthly donor
    - *Transition: I'm curious what led to your interest in ORG, may I ask about that?*
- **Be Curious** –
  - What inspired your first gift to ORG?
  - What inspired you to give to project X?
  - Other engagement questions to learn more, if they're willing
    - *Transition: Thank you so much for sharing. I have one more question about how we can best contact you, if that's okay.*
- **ASK** something of the donor –
  - Say something like: "I'll be sending periodic updates. What's the best way for me to personally communicate? By mail, email, text, or phone?"
  - Or, if they're very engaged, ask, "Would you be interested in touring our program or to attend (an event)?"
    - *Transition: Thanks. So, let me confirm...*
- **Align** again –
  - Confirm contact information, including email address if you don't have it & that's their preference, ask for their cell number.
  - Or confirm that you'll be sending details about the tour/event.
    - *Transition: Can I take one more minute to share an impact story with you and recognize your history with us?*
- **Celebrate** –
  - Thank them again for their support and belief in your mission
  - Tell short story of a life changed.
  - Report back on their lifetime giving or number of gifts and/or impact.

Following the call, note in the database the entire tone & tenor of the conversation:

- Anything about family relationships
- Anything about specific interests, career, hobbies, etc.
- Anything about giving capacity, other charities of interest
- If this was a Qualification call, adjust ownership or status of the record.
- Enter key items learned in the DEP regarding communication preference, interest in org, important note(s).



# Transition Questions

One of the roles you play in any donor conversation is the role of a facilitator. A facilitator's goal is to keep the conversation moving forward, which involves having pre-outlined transition questions.

Connect to Align

*Write your question here*

Align to Be Curious

*Write your question here*

Be Curious to Ask

*Write your question here*



# Transition Questions

One of the roles you play in any donor conversation is the role of a facilitator. A facilitator's goal is to keep the conversation moving forward, which involves having pre-outlined transition questions.

Ask to Align

*Write your question here*

Align to Celebrate

*Write your question here*

Other Question Ideas:



# Create Open-Ended Questions

It's surprising how often we ask Yes/No questions when we're connecting with donors. And while this may provide you with some information, it limits the depth of their answer.

That's why open-ended questions are so critical in your work as a fundraiser, especially in the early stages of building a relationship with a donor.

By crafting questions ahead of time, you'll be more intentional in the questions you ask and more focused on moving the relationship forward.

We like to have our clients craft their open-ended questions using two main categories: questions to learn more about the donor, and questions related to asking/preparing for the ask.

On the next page, you'll see some examples and begin working on crafting your own questions.



# Example Questions

Here are various example questions our team has crafted for specific topic areas you'll want to discuss with your donors.

## Getting to Know Your Donor (Beyond the Bio)

- What has brought you the most fulfillment in your life?
- What's the most memorable book (movie, concert, etc.) you have ever read?
- What were your greatest lessons from your family?
- What inspires you?

## Defining Passions & Interests

- What are you most passionate about in your life right now?
- What are the most important things you'd like to accomplish this year?
- How did you come to the decision to give your first gift?
- Why is our organization important to you?

## Defining Passions & Interests (Continued)

- What makes you continue to give?
- Of all the programs and services that are provided through your gift, what is one that really calls to your heart?
- Of all the gifts you have given, what is one that comes to mind that brought you the most joy?

## Increase Connections

- If you were to tour a project what do you want to learn most about?
- What event most interests you to attend?
- Is there a volunteer opportunity that has caught your eye?
- What would you like to know about us?



# Create Your Own

Referencing the examples shared, create 1-2 of your own open-ended questions for each of the categories noted below.

Getting to Know Your Donor (Beyond the Bio)

Defining Passions & Interests

Defining Passions & Interests (Continued)

Increase Connections

# Example Questions

Here are various example questions our team has crafted for specific topic areas you'll want to discuss with your donors.

## Preparing to Ask

- How do you like to be told about the results of your gift?
- Am I doing an effective job at linking our work to your key priorities?
- What have I done that has been most helpful to you?
- In what ways am I helping you to achieve your goals?

## Discussing the Proposal

- What parts of the presentation will be most valuable for us to emphasize and spend time on?
- Given what we've set out in our proposal, and thinking about value to you, can you say something about what you'd like to see less or more of?

## Donor's Response is to Not Make a Gift

- What has led to your decision that we have either done or not done?
- Are you open to discussions in the future about other giving opportunities?
- What timing would best work for us to come back with projects in the future?

## Donor Says "Maybe"

- What questions are still unanswered for you?
- What concerns do you have?
- What do you still need to know to be able to decide?

# Create Your Own

Referencing the examples shared, create 1-2 of your own open-ended questions for each of the categories noted below.

Preparing to Ask

Discussing the Proposal

Donor's Response is to  
Not Make a Gift

Donor Says "Maybe"





# Developing Your Survey/Questionnaire

Another key step in the qualification process is the Non-Responder Survey/Questionnaire.

This step can get a little tricky because as soon as people hear that you're doing a survey, everyone wants to be a part of it!

You'll have to keep this simple, straightforward, and without input and added questions from others.

The goal of this step is to try a new way of engaging with the donor and learn their passions and interests, communication preferences, and identify any information that needs to be updated.

You may decide to do this step using an online survey, which we've found to be very effective.

You will also do a follow-up call and/or email step to this survey. Be prepared with one or two of the main questions you want answered when you call.



## Non-Responder Survey Sample

### HEADER

We value your thoughts and opinions. Please complete this short informational form and return it in the envelope provided. Thank you for your support.

**KEY QUESTION(s) about AREAS OF INTEREST OR NEED. Example: What are the areas that most interest you?**

- ☐ INSERT 1
- ☐ INSERT 2
- ☐ INSERT 3
- ☐ Other: \_\_\_\_\_

**AND/OR: I'll be sending periodic updates on the impact of your giving; are there any specific areas you'd like to learn more about?** \_\_\_\_\_

**We're collecting stories and I'd love to hear yours. What led to your involvement with ORG?**

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**How do you prefer to be contacted? (select all that apply)**

☐ Email ☐ Mail ☐ Phone ☐ Text ☐ Video Chat ☐ Personal Visit

Following is the contact information we have for you; please correct or complete as you'd like:

MERGE

Your Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ Phone: \_\_\_\_\_

Phone: \_\_\_\_\_ E-mail Address: \_\_\_\_\_

If you have any questions about ORG and our work, please contact me:

Name

Title

Phone

Email



# Survey Plan

Take a moment to map out what you want to learn about in the survey.

Survey Questions to Include:

