Major Gifts Intensive provides you a clear plan to move forward with successful major gift fundraising.

One key to developing the plan that works for you is to understand where you are right now. The checklist below is designed to do just that. Be honest about where you are as it will help you know where to focus, seek the best advice in your coaching calls, and help us to offer you what you need when you need it.

Complete the checklist below and send to coaching@gailperry.com by March 23, 2022.

Assess your organizational strength in each of the noted areas *(1 = weak or low, 5 = strong or high)*	1	2	3	4	5
Staffing and Resources					
1. We have enough staff devoted to major gift fundraising.					
2. Our staff gets out of the office enough to make donor and prospect visits.					
3. Our organization supports major gift fundraising with resources for major gift work.					
Major Gift Prospects					
4. We have a Master Prospect List of identified prospects.					
5. We have rated and qualified the major gift prospects on our list.					
6. We know the dollar potential of our major gift prospects.					
7. We know the specific interests, passions, and areas of interest of our major gift prospects.					
8. We design cultivation experiences for major gift prospects that are focused around their area(s) of interest.					
9. We create cultivation plans for our major gift prospects: who is involved, how we will develop prospects' interests, and the hoped-for ask amount of their major gift.					

10. We have a monthly major gift strategy session to evaluate where we are with our prospects.					
Systems					
11. We have a system to track our progress with major gift prospects.					
12. Our CRM or database clearly and easily supports the work of major gift staff.					
Qualification and Cultivation					
13. We have allocated enough staff and volunteer resources to successfully cultivate and solicit our major prospects.					
14. We have some major donors who feel like they are close friends of our organization.					
15. We are able to confidently carry out face-to-face or virtual solicitations of our major gift donors or prospects.					
16. We recognize and honor major donors and their gifts with receptions or events in their honor.					
17. We know the major donors for our most recent capital campaign and we are in touch with them.					
Board Support					
18. Our board members are comfortable and active helping us identify new major gift prospects.					
19. Our board members are involved in helping cultivate, develop relationships with, and solicit major donor prospects when appropriate.					
20. Our board members help us thank and continue to cultivate major donors after they give.					
Total for each column					

Grand total _____

20 – 46 Points **You've got work to do!** The Major Gifts Intensive course will speed you on your way to establish and grow your major gifts efforts.

47 – 73 Points **You're on your way.** The Major Gifts Intensive course will help you take the next steps to successful major gift fundraising.

74 – 100 Points **You're in pretty good shape.** The Major Gifts Intensive course will sharpen your strategies into a highly profitable major gift plan!

It's important to ask why – or why not – for each question to offer your organization, your team and yourself more insight about what's really happening and where you can grow and excel.