

DONOR SUCCESS

THE MAJOR GIFT READINESS GUIDE

A practical assessment for determining whether your nonprofit is truly ready to identify, cultivate, solicit, and steward major donors.

ALIGN → UNDERSTAND → PRIORITIZE → CULTIVATE → INVITE

**Major gifts are rarely won by a great ask.
They are earned by everything that happens before
it.**

Grow Donors. Grow Giving. Grow Impact.

Major gifts do not start with major donors.

They start with an organization that is prepared to build major relationships.

Many nonprofits want to grow major giving, but the instinct is often to begin with a list: Who has money? Who can we ask? Who does our board know?

Those questions matter later. First, the organization has to answer a more important one: **Are we ready to earn a deeper level of trust, investment, and partnership?**

Leadership Alignment

Do leadership and the board understand the strategy and their roles?

Donor Intelligence

Do you know enough about the people already connected to your mission?

Portfolio Discipline

Can your team prioritize the right relationships and move them intentionally?

Case for Support

Can you clearly connect a significant investment to meaningful impact?

Cultivation Capacity

Do you have the time, systems, content, and people to build relationships consistently?

Major gift fundraising is not a campaign tactic. It is a relationship discipline.

The Donor Success Major Gift Readiness Model

FOUNDATION	READINESS AREA	WHAT GOOD LOOKS LIKE
1	LEADERSHIP ALIGNMENT	Shared commitment, clarity, access, and accountability.
2	DONOR INTELLIGENCE	A meaningful understanding of donor behavior, interests, relationships, and potential.
3	PORTFOLIO DISCIPLINE	A focused set of relationships with owners, stages, actions, and priorities.
4	CASE FOR SUPPORT	A compelling reason for a donor to invest at a transformational level.
5	CULTIVATION CAPACITY	The organizational ability to consistently build, advance, and steward relationships.

Score each foundation honestly. The purpose is not to prove you are ready. It is to identify what must be strengthened before you scale.

Leadership Alignment

Major giving has to be an organizational priority, not a development department side project.

Score each statement from 1 (not in place) to 5 (consistently strong).

READINESS STATEMENT	1	2	3	4	5
Executive leadership understands why major gifts matter to the organization's growth strategy.	■	■	■	■	■
The CEO / Executive Director is willing to participate in donor cultivation and solicitation.	■	■	■	■	■
Board members understand how they can give, open doors, cultivate, and advocate.	■	■	■	■	■
Development leadership has authority to prioritize major donor activity.	■	■	■	■	■
The organization is aligned on what qualifies as a major gift for its current reality.	■	■	■	■	■

Watch for

Major gifts are discussed only when revenue is behind; leaders expect development staff to 'go find wealthy people'; board members are disconnected from cultivation.

Build next

Define leadership roles, agree on the major gift threshold, establish executive/board participation expectations, and create a regular major gift review rhythm.

Donor Intelligence

You cannot cultivate what you do not understand.

Score each statement from 1 (not in place) to 5 (consistently strong).

READINESS STATEMENT	1	2	3	4	5
Donor records include more than gift history and contact information.	■	■	■	■	■
The team can identify donor interests, engagement, relationships, and recent activity.	■	■	■	■	■
Giving history can be viewed across time, not just campaign by campaign.	■	■	■	■	■
The organization can recognize signals of increased engagement or opportunity.	■	■	■	■	■
Staff consistently capture meaningful information learned through donor interactions.	■	■	■	■	■

Watch for

Prospects are prioritized only by wealth screening or gift size; important donor knowledge lives in staff heads; data is incomplete or scattered.

Build next

Clean priority records, define the intelligence your team needs, capture relationship data consistently, and combine capacity with affinity and engagement.

Portfolio Discipline

A major gift portfolio should be focused enough to manage and valuable enough to matter.

Score each statement from 1 (not in place) to 5 (consistently strong).

READINESS STATEMENT	1	2	3	4	5
Each priority donor has a clear relationship owner.	■	■	■	■	■
Prospects are qualified before consuming significant staff time.	■	■	■	■	■
Every active relationship has a stage and next best action.	■	■	■	■	■
Portfolio reviews focus on movement, not just gift totals.	■	■	■	■	■
Inactive or unqualified prospects are removed or moved to appropriate stewardship.	■	■	■	■	■

Watch for

One fundraiser carries hundreds of 'major prospects'; names sit in portfolios with no activity; there is no agreed qualification process.

Build next

Set portfolio limits, define stages, qualify aggressively, assign owners, and review next actions at least monthly.

Case for Support

A donor is not investing in your budget gap. They are investing in what becomes possible.

Score each statement from 1 (not in place) to 5 (consistently strong).

READINESS STATEMENT	1	2	3	4	5
The organization can clearly articulate the problem or opportunity.	■	■	■	■	■
The case connects mission, strategy, outcomes, and investment.	■	■	■	■	■
Funding opportunities exist at meaningful levels appropriate to major donors.	■	■	■	■	■
Leadership can explain why now and why this organization.	■	■	■	■	■
The case can be personalized around donor interests without changing the mission.	■	■	■	■	■

Watch for

The pitch is mostly organizational history; asks are built around internal need; funding amounts feel arbitrary; impact is vague.

Build next

Build a clear investment narrative, define fundable opportunities, quantify outcomes where appropriate, and equip leaders with stories and proof.

Cultivation Capacity

Major relationships require time, consistency, coordination, and follow-through.

Score each statement from 1 (not in place) to 5 (consistently strong).

READINESS STATEMENT	1	2	3	4	5
Staff have protected time for donor cultivation.	■	■	■	■	■
The organization has useful stewardship and impact content.	■	■	■	■	■
Leadership and board members can be deployed into relationships when helpful.	■	■	■	■	■
Systems support tasks, notes, next actions, and relationship visibility.	■	■	■	■	■
The team can sustain stewardship after a major gift is received.	■	■	■	■	■

Watch for

Fundraisers are consumed by events and administration; follow-up depends on memory; donors hear from the organization mostly when money is needed.

Build next

Protect cultivation time, simplify workflows, create a stewardship content rhythm, use technology to surface next actions, and plan post-gift stewardship before solicitation.

Your Major Gift Readiness Score

Add the five scores within each foundation. Each foundation has a maximum of 25 points, for a total possible score of 125.

FOUNDATION	YOUR SCORE	MAX
Leadership Alignment		25
Donor Intelligence		25
Portfolio Discipline		25
Case for Support		25
Cultivation Capacity		25
TOTAL		125

100-125 | READY TO SCALE

Your foundations are strong. Focus on portfolio execution, relationship movement, and increasing the quality of major gift opportunities.

75-99 | BUILD WHILE YOU GROW

You have a workable foundation, but one or two gaps may limit performance. Prioritize the lowest-scoring foundations.

50-74 | STRENGTHEN THE ENGINE

Do not rush into a major campaign. Build the operating discipline, intelligence, and capacity that major giving requires.

Below 50 | BUILD THE FOUNDATION FIRST

The opportunity may be real, but the infrastructure is not ready yet. Start with alignment, data, donor experience, and a focused pilot.

Who Belongs in a Major Gift Portfolio?

Wealth alone does not make someone a qualified major donor prospect. Donor Success recommends looking at three dimensions together:

AFFINITY

Do they care deeply about the mission, population, issue, geography, or outcome?

ENGAGEMENT

Are they responding, attending, volunteering, giving, referring, meeting, or otherwise leaning in?

CAPACITY

Is there evidence they may be able to make a gift at or above your organization's major gift level?

Affinity + Engagement + Capacity creates a much stronger qualification signal than capacity alone.

A high-capacity person with no connection to your mission is not automatically a prospect. A deeply engaged donor with growing giving behavior may deserve far more attention than a wealth score suggests.

The Major Donor Relationship Pipeline

STAGE	CORE QUESTION	NEXT ACTION EXAMPLES
Identify	Should we learn more?	Research, relationship mapping, review giving/engagement
Qualify	Is there real affinity, engagement, capacity, and access?	Intro, discovery conversation, mission experience
Cultivate	Are trust and alignment getting stronger?	Listening, impact, leadership connection, tailored engagement
Prepare	Is there a clear opportunity and appropriate invitation?	Confirm interest, build proposal, align ask team
Invite	Are we ready to make the ask?	Personal solicitation, proposal conversation, follow-up
Steward	How do we deepen trust after the gift?	Gratitude, reporting, access, impact, continued relationship

If a relationship has been sitting in the same stage for months with no next action, it is not a pipeline. It is a parking lot.

60-Day Major Gift Readiness Sprint

DAYS 1-15	ASSESS	Complete the readiness assessment. Agree on your major gift threshold. Identify the two weakest foundations.
DAYS 16-30	FOCUS	Select a small pilot portfolio. Clean the records. Assign owners. Qualify using affinity, engagement, capacity, and access.
DAYS 31-45	EQUIP	Strengthen the case for support. Build key stories and impact proof. Map board and leadership relationships. Define next actions.
DAYS 46-60	MOVE	Begin intentional cultivation. Hold a recurring portfolio review. Track movement, learning, and relationship health - not just dollars.

Start with 10-25 relationships you can cultivate exceptionally well. Prove the discipline. Then scale it.

PUT IT INTO ACTION

Major giving grows when relationships grow.

The biggest mistake is treating major gifts like a shortcut to more revenue.

There is no shortcut. There is alignment. Intelligence. Focus. A compelling reason to invest. Consistent cultivation. A thoughtful invitation. And stewardship that proves the donor made the right decision.

Do not build a list of wealthy people.

Build a system capable of earning transformational relationships.

READY TO UNDERSTAND YOUR ORGANIZATION'S DONOR GROWTH READINESS?

Donor Success combines intelligent donor technology and practical advisory support to help nonprofits understand donor health, prioritize relationships, identify opportunity, and know what to do next.

Visit donorsuccess.com to learn more or book a Donor Growth Assessment.

Grow Donors. Grow Giving. Grow Impact.