



# Major Gifts Fundraising MasterClass Part 3

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*Securing The Gift: Moving Prospects  
from "Interested to Invested"*



How to Create and Manage a  
Donor Portfolio

## Part 3 | Securing the Gift: Moving Prospects from “Interested” to “Invested”

### What we'll cover today:

1. Discover precisely how to move prospects toward a gift via the 5-Step “Moves Management” process
2. Know exactly what to do in each step, even when advancing multiple prospects
3. Build your own Donor Portfolio by adding names to your Prospect List (using the template provided)



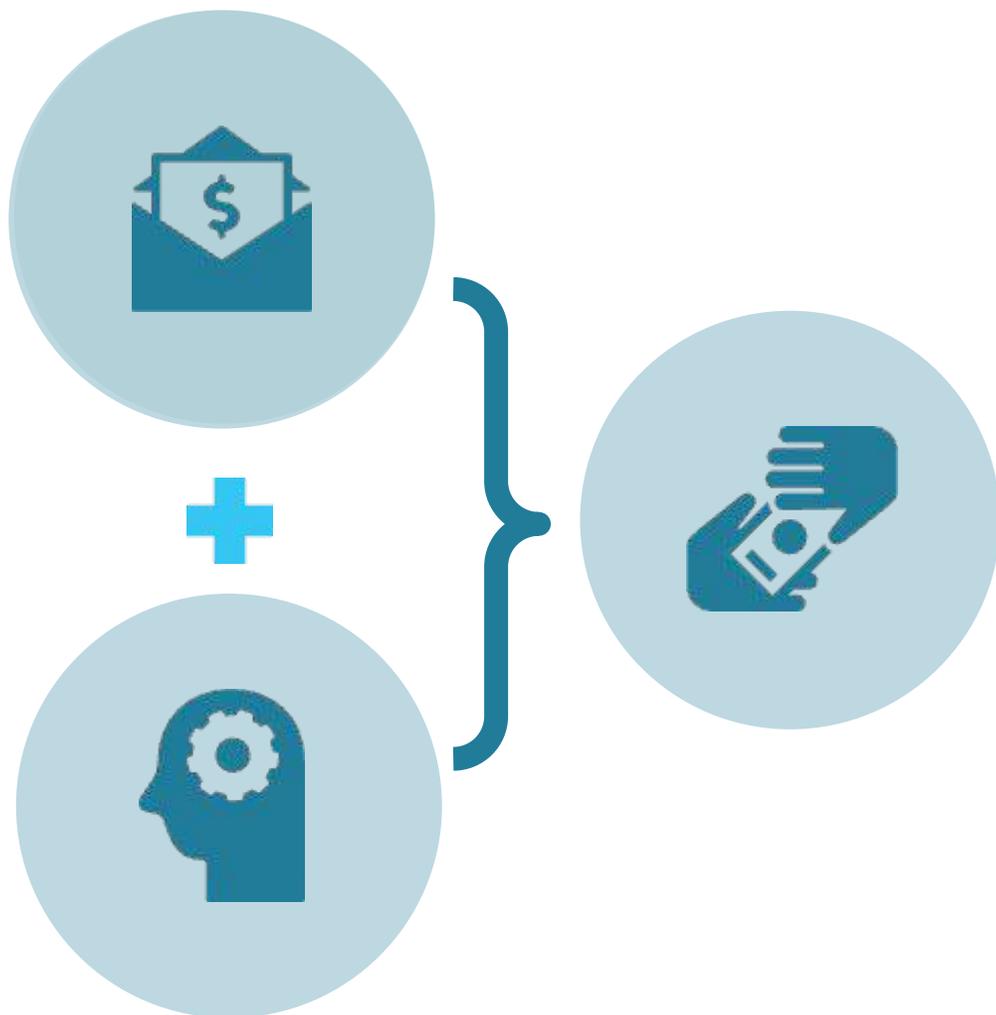
**Problem:** Now we've identified Major Gifts prospects, what do we do with them?



**David Dunlop, 1937-2023**

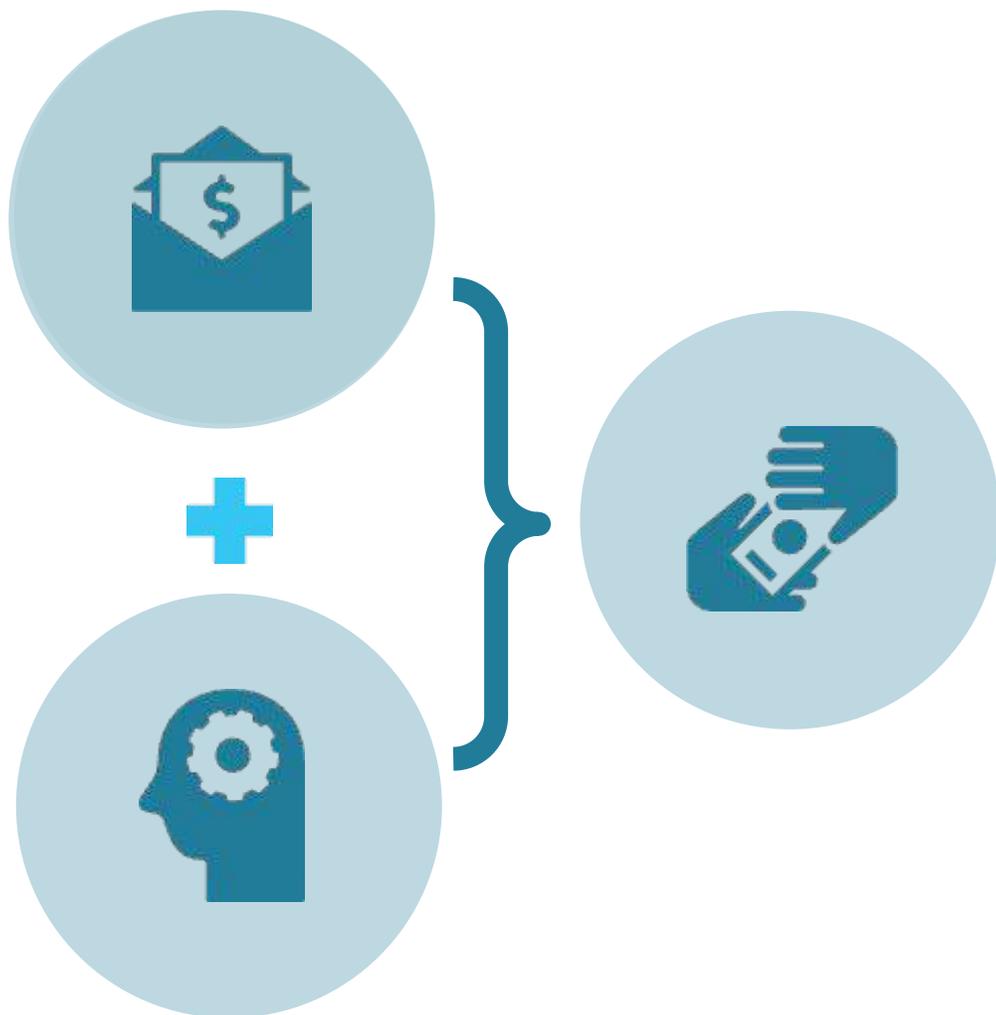
**Solution:** Moves Management is the process by which we advance prospective donors through the giving stages.

# Identification Stage



**Identified Prospects:** Your list of prospects with the capacity and propensity to provide a gift large enough to drive missional and organizational objectives.

# Identification Stage



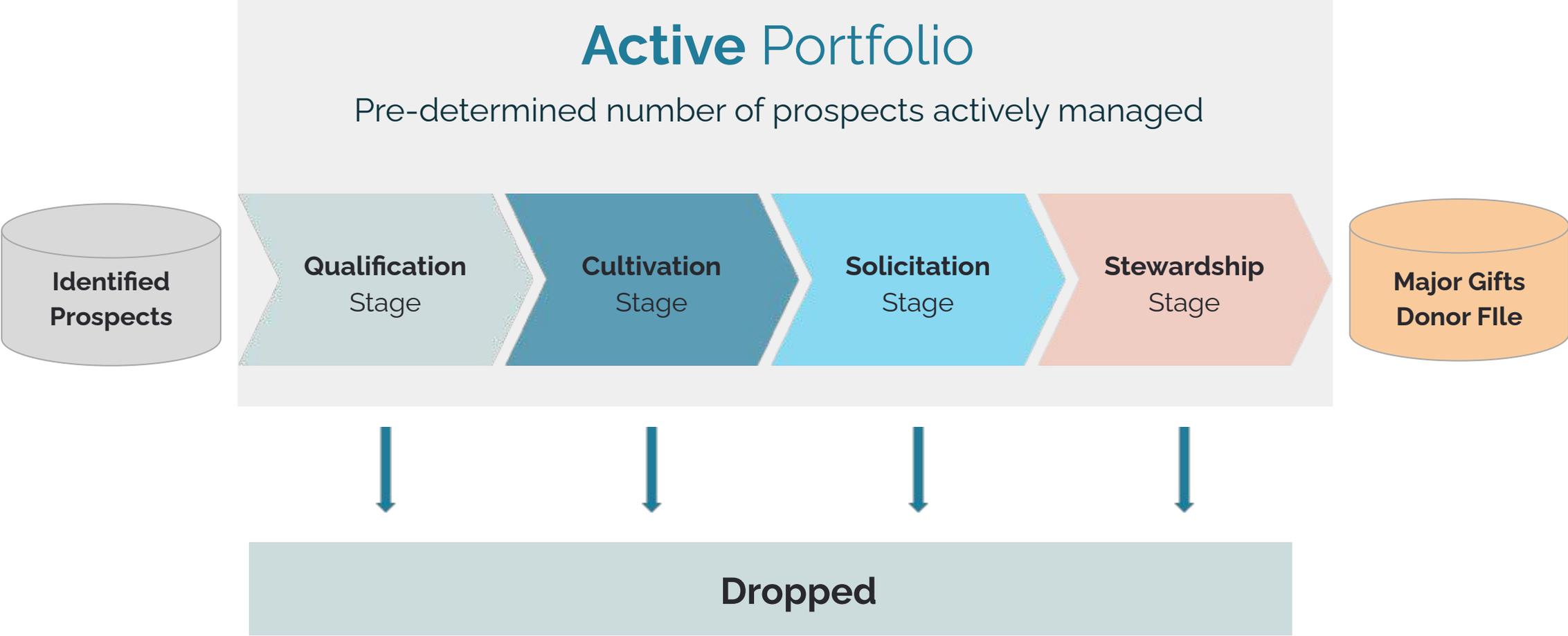
## Actions:

1. Establish criteria for selection (focus on capacity and propensity)
2. Create a prospect list fulfilling the established criteria.
3. Select a manageable number of prospects to move into the active portfolio.

## Note:

- Continuously add new prospects to this list based on the criteria set.
- Recommendations for the active portfolio size can vary but start with 10.

# Portfolio Management



# Qualification Stage

## Goal:

**To determine** if a prospect is willing to engage in a philanthropic relationship with the organization

## Guidelines:

1. **Number of actions:** No more than three attempts (phone call, email, snail mail)
2. **Nature of actions:** Request to meet to share more about the organization, cause, and prospects' potential involvement
3. **DROP:** Eliminate (for now) when the prospect says "no" or is unresponsive to all 3 attempts
4. **MOVE:** Advance the prospect to the next step if "yes"

# Cultivation Stage

## Goal:

To execute actions that **build relationship** with a prospect, to achieve the following:

- Relational comfort with YOU
- Credibility with the ORGANIZATION
- Determine the right project
- Determine the right ask amount



# Cultivation Stage

## Guidelines:

- 1. Number of actions:** Minimum of 3 contacts before checking off the above criteria, minimum of 1 face-to-face meeting if possible (Zoom if physical not possible)
- 2. Nature of actions:** Relationship building, vision-casting, and information sharing
- 3. DROP:** When prospect is unresponsive to 3 or more actions
- 4. MOVE:** When permission to submit a proposal has been given





# Solicitation Stage

**Goal:**

To **secure** the gift

**Guidelines:**

1. **Number of actions:** Minimum of 1, no more than 4 over a six-week period
2. **Nature of actions:** to submit a gift proposal, clarify questions, and finalize terms
3. **DROP:** if unresponsive after 4 contacts
4. **MOVE:** when the gift arrives



## Stewardship Stage

### Goal:

To **thank the donor**, demonstrate the impact of the gift and further strengthen the relationship

### Guidelines:

1. **Number of actions:** 6 actions per year since the date of the gift
2. **Nature of actions:** Handwritten thank-you note, quarterly phone check-ins, 6-month "impact reports", annual report, 2 in-person meetings per year
3. **DROP:** If actual gift is below major gift level, eliminate
4. **MOVE:** If gap exceeds the 12 month mark since last gift, move back to cultivation

# Portfolio Management and Your Qualified Prospect List

Team Member	Last Name	First Name	Ask Amount	Current Stage	Last Action	Next Action

# Portfolio Management: Your Qualified Prospect List

Team Member	Last Name	First Name	Ask Amount	Current Stage	Last Action	Next Action



## Action Items

1. Using the Donor Portfolio template, choose 10 identified prospects and label them “Active” under the Qualification Stage
2. Contact all 10 prospects to request in-person meeting if possible, or a phone or zoom meeting
3. Join us for the next training session, where I will share a donor proposal and also invite you to take a deeper dive into raising Major Gifts



Don't Miss Out!

**Stay Tuned for more Major  
Gifts MasterClass...**

**Part #4 | Bringing it All Together**

**How to Start Your Fundraising  
Journey Today**