



carefully researched to fully understand each prospect’s priorities, donor history, and investment requirements.

- 5. Develop donor cultivation plans to support each of your case for support or major bucket areas.** For each funding prospect, this will require multiple steps of donor outreach that goes well beyond these initial, critical steps for developing your donor pipeline. The chart below illustrates the time, effort and strategy it takes to develop donor relationships and accelerate commitments. You must pristinely match each donor prospect’s areas of philanthropic focus and passion with your mission. You must prove your organization’s credibility for delivering value as well as reputation.

As you develop your organization’s donor investment pipeline, you’ll be well-positioned to go well beyond the limits of special event fundraising by creating a robust, major-gift pipeline.

Stage	Defined By	Cues of Readiness for the Next Level
<b>Identification</b>	Using giving behavior, wealth screening, referrals, and peer assessments to identify persons with the financial capacities to be major gift prospects.	<ul style="list-style-type: none"> <li>Responsiveness to outreach by annual giving or major giving appeals.</li> <li>Confirmation of potential by third parties or volunteers.</li> <li>Engagement with the organization outside of development.</li> </ul>
<b>Qualification</b>	Initiation of a relationship with a prospective donor and determination of their interests and potential gift capacity.	<ul style="list-style-type: none"> <li>Confirmation of capacity, appropriateness of unit/fundraiser assignment, and initial strategy in place based on giving interests.</li> <li>Willingness to participate in follow-up outreach and engagement.</li> </ul>
<b>Cultivation</b>	Deliberate relationship building with a prospect and implementation of a strategy based on interests.	<ul style="list-style-type: none"> <li>Prospect responsiveness to a particular priority or project.</li> <li>Upcoming life changes in prospect’s life.</li> <li>Strong understanding of prospect (and family) decision-making process and financial obligations.</li> </ul>
<b>Solicitation</b>	Asking a prospect to consider a gift, specific in amount, purpose, and timeline.	<ul style="list-style-type: none"> <li>Negotiation of terms for a gift.</li> <li>Discussion of recognition levels.</li> <li>Involvement of third parties (lawyer, financial advisor, etc.).</li> </ul>
<b>Closing the Gift</b>	Finalization of gift agreement, vehicles, and relationship between a donor and an organization.	<ul style="list-style-type: none"> <li>Completed and signed agreements.</li> <li>Initial pledge payments received.</li> </ul>
<b>Stewardship</b>	Acknowledgement of a gift, recognition of giving, and reporting to the donor the impact of their philanthropy on the organization’s mission.	<ul style="list-style-type: none"> <li>Completion of pledge payments.</li> <li>Interest in new projects or volunteer role.</li> <li>Upcoming life event or change to financial circumstances.</li> </ul>