Major Gifts Self-Assessment Tool

Whether your major gifts program is established or just getting off the ground, this self-assessment tool will help you identify areas you can strengthen, as well as strengths to build on.

1. Our organization has a working definition of a major gift.

5 – Always	4	3	2	1 – Never

2. Our organization has policies and procedures for accepting major gifts.

5 – Always	4	3	2	1 – Never

3. Volunteers are involved in identifying, cultivating, and/or soliciting major gifts.

5 – Always	4	3	2	1 – Never

4. Our organization invests in appropriate levels of staffing, systems, and other resources to support major gifts fundraising.

5 – Always	4	3	2	1 – Never

5. Every board member makes a major gift annually to our organization.

5 – Always	4	3	2	1 – Never

6. The CEO is personally and actively involved in cultivating, soliciting, and building relationships with our top donors (and others as appropriate).

5 – Always	4	3	2	1 – Never

7. We use a donor database to record, track, and report on information regarding current and prospective major donors.

5 – Always	4	3	2	1 – Never

8. We use a portfolio management system to help key staff build and maintain relationships with current and prospective major donors.

5 – Always	4	3	2	1 – Never

9. We articulate for the level and type of activities we expect from staff who are involved with major gifts fundraising, and we regularly evaluate and report on those activities.

5 – Always	4	3	2	1 – Never

10. We use research to qualify prospects and develop tailored cultivation and solicitation strategies.

5 – Always	4	3	2	1 – Never

11. We provide regular (at least annual) "impact reports" to major donors, and the reports are tailored to each donor's most recent gift and interests.

5 – Always	4	3	2	1 – Never

12. At least annually our organization reviews and refreshes the case for support/investment.

5 – Always	4	3	2	1 – Never