

How to Generate a Major Donor Plan

Key decisions needed to generate a major donor plan

- What is your major donor “level”? This is the minimum amount you consider a major gift.
- What is your tentative dollar goal for major donor giving during the campaign? (This may wind up moving down or up based on additional planning, but it helps to start with a ballpark estimate).
- How long will the campaign be? (Short 6-10 week burst or sustained over half or all year?)
- Who will be the team? Who on staff? Who on the board? What other non-board volunteers?
- What will be their roles? (Who will manage data/own the plan, who will do asks, who will do research, who will create materials, etc.)
- About how much time will members of the team be able to devote towards the campaign?

Steps to take once key decisions are made

- Pull together data on past giving. At a minimum: How much did major donors give in each of the last 2 years (or 3).
- Brainstorm a prospect and a suspect list.
 - *Prospects* are past donors you hope to upgrade or maintain at the major donor level, plus new potential donors who meet the Ability, Belief, Connection test.
 - For all *prospects*, assign them a tentative target for the gift you’d be comfortable asking.
 - *Suspects* are new potential donors who meet **any** of the A, B, C test where you don’t yet know if they meet the other parts of the test or what level of giving to assign them.
- Create a draft gift chart/pyramid identifying how many gifts at each giving level, adding up to the goal.
 - Top of the pyramid should be 15-20% mark of the overall campaign. In other words, if you have a \$100,000 goal, your lead gift should be in the \$15,000-\$20,000 range.
 - Play around with the pyramid adjusting numbers until it “looks right” with a few larger gifts, more middle gifts, and the most gifts at the low-end of your major donor range. Excel makes this pretty easy.

- For each level, add a column for the number of *prospects* you need for each gift you need. A general rule of thumb: you need 4 prospects for every gift for the top levels, 3 prospects for every gift in the middle levels, and 2 prospects for every gift at the lowest levels.
- Do a reality check comparing your *prospect* list with the gift chart. Do you already have enough prospects? Do the prospects line up roughly with the giving levels you need based on your gift chart?
 - If not, what percentage of your suspects will need to prove to be solid prospects via further research or outreach? Does that percentage seem realistic?
 - If you're short prospects and it's a year-long campaign, how many new prospects do you expect to emerge as leads from donor referrals or through continued efforts to add to your team and identify new prospects?
 - If, after answering the prior questions, you don't have enough prospects overall, can you realistically secure a larger lead gift or gifts so you can decrease the number of prospects you need at the lower levels of the pyramid?
 - Conversely, if you have plenty of prospects overall, but not at the top giving levels, can you broaden the pyramid with more asks at the lower level to make up for shortfalls at the top?
 - Or do you have to reduce your goal because it's too high? If so, reduce the goal and gift chart to make it realistic in light of your prospects and opportunities to generate prospects.
- Determine if you have enough time? It does no good to have enough prospects if you don't have a team with sufficient time to pursue gifts through one-on-one meetings, backed up by phone calls for those donors you are not upgrading and who're at the lower levels of the pyramid.
 - As a general rule (assuming no significant travel time), assume one day of work for each ask in the top 2 rungs of your pyramid and half a day for each ask lower down pyramid. (That's time per prospect/ask, not time per successful gift). If your prospects are geographically spread out, add in some travel time.
 - If you don't have enough time, can you expand the team to include more askers? Or assign more staff time? Or do you need to adjust your goal downwards for lack of time? Or spread the campaign out over more months?
- Once you settle upon a final gift chart and prospect list, assign each prospect to a month (or quarter) and who on the team will make the ask. Identify the next step with each prospect (whether a cultivation touch or an ask). You can manage this in a spreadsheet or in your fundraising database depending on its capabilities.
- You have a major donor plan!