

APPRAISING DESIRABLE DONORS

In ADD, you have the ten criteria that are most critical in determining how successful you may be in securing a major gift. This instrument measures your readiness to ask for the gift. It may not be fail-proof, but it is as close as you can get. A major gift donor is a person who . . .

	Rating
1. Has significant Net Worth— a person who is financially capable of a large gift.	
2. Has disposable income.	
3. Is past the “accumulation” phase of life.	
4. Believes strongly in the mission of your organization.	
5. Has high philanthropic intent and experience.	
6. Has few family commitments— single or widowed, or with no children, dependents, or heirs	
7. Is an advocate of the type of service you provide, even though they might not be familiar with your organization.	
8. Has been giving to you annually over a long period of time.	
9. Is a known donor— to your organization and others.	
10. Has or currently serves on your board or is an active volunteer.	
TOTAL	

Rank your Probable Donor (1 to 5— 5 being the highest)

45-50	Excellent Prospect for a Gift
37-44	You have a good opportunity
31-36	It could be challenging
25-30	This is going to take a lot of work
24 & under	This is going to be really tough

- 5 Without Question
- 4 Yes— I believe so
- 3 I’m pretty certain this is True
- 2 Not Certain
- 1 No

The Name of Your Probable Donor _____

His or Her Score _____



BEQUESTS

Where do Bequests come from? For starters, don't overlook the smaller Net Worth friend of the organization. 82% of the Charitable Bequests come from estates of \$2 million or less.

And there's always the surprise. The \$10 donor who stopped giving anything at all several years ago. (Did you stop mailing to her and drop her from your database?). She leaves you her home and \$100,000. Or the college laundry lady who leaves the school \$3 million.

But those are the exceptions. Your Bequests will more likely follow the pattern below:

	Rating
1. 5 or more years of consecutive giving.	
2. Long term giving that may not be consecutive.	
3. Frequent giving during the year.	
4. They, or members of the family, involved in some way.	
5. Has no heirs.	
6. Few family obligations	
7. Has sufficient funds for retirement.	
8. Over 70 years of age.	
9. Has been called on (or has been receiving material) regarding legacy opportunities.	
10. Experienced a major life event (illness, death of a loved one, etc.).	
TOTAL	

Rank your Probable Bequest Person (1 to 5— 5 being the highest)

45-50	Excellent Prospect for a Bequest
37-44	You have a good opportunity
31-36	It could be challenging
25-30	This is going to take a lot of work
24 & under	This is going to be really tough

The Name of Your Probable Person for a Bequest _____

His or Her Score _____

