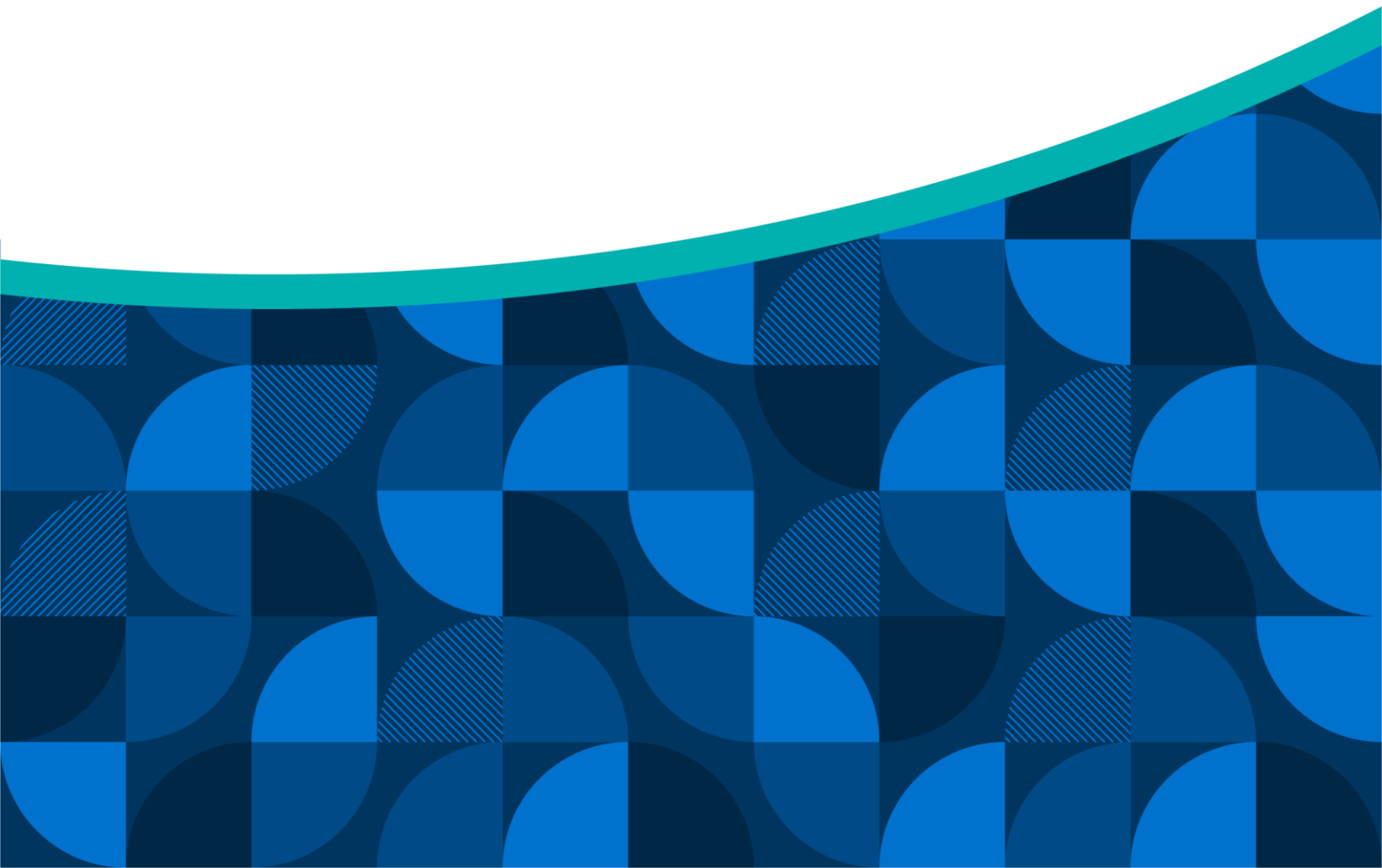




Building a Major Gift Pipeline From Engagement Events

Identifying New Major Gift
Prospects with Affinity



Bridging the Gap from Events to Major Gifts

INSTRUCTIONS

Event attendance signals an alum is engaged and a “warm prospect.” Advancement must capitalize on that affinity and quickly move major gift prospects to cultivation before it fades.

- 1 Organize a meeting of advancement division leaders that oversee prospect research/management, major gift officers, qualification, alumni relations and events, and the CRM manager.
- 2 During the meeting, use the questions on the next two pages to determine how an event attendee with major gift capacity can quickly move into a portfolio.

Step One: Review Event Attendees for Major Gift Capacity

The first step in building a pipeline of new major gift donors from those that attend engagement events is identifying attendees with capacity to engage them further. Using the prompts below, decide on a procedure for reviewing attendee lists.

1. Who should review attendee lists?

(Examples: alumni relations coordinator, prospect researcher)

2. Which job duties may need to be modified or removed to adjust for this new responsibility?

3. When should attendee lists be reviewed?

(Examples: monthly, after each event)

4. How can staff cross-reference attendee lists and capacity ratings?

(Examples: CRM report, download excel sheets and compare, etc.)

Other Notes:

Bridging the Gap from Events to Major Gifts (cont.)

Step Two: Notify Development Officers About Warm Major Gift Prospects

After identifying event attendees with major gift capacity, development officers must be notified—otherwise, prospect affinity may fade before initial contact. Using the prompts below, decide on a procedure for notifying development officers about warm prospects.

1. Who or what technology should share the list of warm prospects with development officers?

(Examples: prospect manager, CRM ping, added to open prospect pool list)

2. What expectations should be set for development officers to quickly contact warm prospects?

(Examples: contact required within a month, open prospect pools means they're incentivized to engage, qualification officers must make contact that week)

3. How will development officers be held accountable for contacting warm prospects surfaced from events?

(Examples: prospect manager monthly check-ins, alumni engagement pipeline quarterly review)

Other Notes: