

Donor Relationship Management Prospect Scoring System

Give your prospects a score from 1-3 (using your best judgment)

Criteria #1- What's their interest level in our organization and mission?

Criteria #2- Are they charitable/philanthropic?

Criteria #3- What is their capacity to give?

Example:

<u>Donor</u>	<u>Score</u>
Sue Jones	
Loves our charity-volunteers, always around	3
Gives to us and other charities in our community	3
Modest means giver	<u>1</u>
Total Score	7
Mike Lewis	
Not sure how connected he is to our charity	1
Does give to his alma mata	2
Very wealthy	<u>3</u>
Total Score	6
Sharon Tredd	
Loves us, always at events, volunteers	3
Loyal annual fund donors	3
High net worth	<u>3</u>
Total Score	9

Prioritize your 9's, 8's 7's and go see them!

Bonus tip: Give donors a behind the scene tour whenever possible. If you are a theater, take them back stage. If you are a college, and they love sciences, take them into a lab with students. If you are a hospital, introduce them to doctors, nurses, researchers, etc..

For in house training call Joe Tumolo at 610-653-7906 or visit him online at www.joetumolo.com