

MAJOR DONOR LAB • SELF-ASSESSMENT

Is Your Organisation Ready to Approach a Major Donor?

A 5-minute honest look at whether the gap holding you back
is donor generosity — or donor *trust*.

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Before you begin

Most organisations assume the reason major donor income stalls is that they haven't found generous enough donors yet. In practice, the gap is almost always somewhere else: in how ready the organisation is to build a real, trusted relationship once a promising donor is in front of them.

This assessment walks through five areas that determine major donor readiness. For each statement, tick the box only if it is true **today**, not where you hope to be in six months. Be honest — this is a diagnostic, not a report card.

At the end, add up your ticks and turn to the scoring guide to see where to focus first.

1. Donor Relationships & Trust

The foundation. Major giving is a relationship discipline before it is a fundraising discipline.

- ☐ We can name our top 10 donor or prospect relationships without checking a spreadsheet.
- ☐ Someone on our team meets regularly with major donors and prospects face-to-face (or by video), not only by email or appeal letter.
- ☐ We know why each of our major donors or prospects cares about our cause, beyond “they have money.”
- ☐ We have a plan to build trust with a prospect over months, not just an ask for the next campaign.
- ☐ Donors hear from us with good news and updates, not only when we need something.

2. Internal Culture & Leadership Buy-in

Major donor work needs air cover. Without leadership behind it, even a strong plan stalls.

- ☐ Our leadership (CEO, Board, or both) actively supports major donor cultivation, not just annual fundraising.
- ☐ Our Board understands its role in introductions, stewardship, or asks — and at least some members act on it.
- ☐ Major donor relationships are treated as a strategic priority, not a side project for whenever time allows.
- ☐ We have realistic expectations that major donor income builds over 12–24 months, not one quarter.

3. Systems & Infrastructure

Relationships get lost without a place to track them. Good systems protect institutional memory.

- ☐ We have a donor database or CRM (even a well-kept spreadsheet) that is actually kept up to date.
- ☐ We track the last contact date and next planned action for every major prospect.
- ☐ We have a simple way to segment donors by capacity and closeness to our organisation.
- ☐ If our major gifts lead left tomorrow, someone else could pick up the relationships without starting from zero.

4. Strategy & Prioritisation

Readiness means knowing who to focus on and why — not treating every donor the same.

- ☐ We have identified a specific list of major donor prospects, not just “anyone who might be able to give.”
- ☐ We have a written (even one-page) major donor strategy or engagement plan for this year.
- ☐ We know what a compelling case for support looks like for a major gift, beyond our general appeal.
- ☐ We review major donor progress on a regular cadence (monthly or quarterly), not only at year-end.

5. Team Capacity & Skills

Even a strong strategy needs someone with the time, skill, and confidence to carry it out.

- ☐ At least one person has real capacity (time in their week) dedicated to major donor cultivation.
- ☐ That person feels confident having a direct, values-based conversation about a significant gift.
- ☐ We invest in developing major gifts skills (training, coaching, or mentoring), not just hoping people figure it out.
- ☐ We have a plan for what happens to major donor relationships during staff transitions.

Your Score

Count every box you ticked across all five sections (21 statements total), then find your band below.

0–5**Not Yet Ready**

Your gap isn't donor generosity — it's foundation. Start with internal buy-in and a simple system before approaching prospects, or early conversations will be hard to sustain.

6–11**Building the Foundations**

The pieces are emerging but inconsistent. Pick your lowest-scoring section and strengthen it for one quarter before expanding your prospect list.

12–17**Ready to Begin**

You have enough in place to start real cultivation conversations. Focus now on consistency: a written plan and a regular review rhythm will accelerate results.

18–21**Major-Donor Ready**

Your foundation is strong. The opportunity now is depth and scale — refining stewardship and growing the number of trusted relationships you can hold well.

The Real Takeaway

Wherever you scored, the pattern is the same: organisations rarely fail at major giving because they can't find generous people. They struggle because the relationship — the trust, the systems, the consistent attention — isn't there yet to receive that generosity. Money moves toward trust. Build the trust first, and the gifts follow.

Your score is a starting point. Get practical ideas, tools and guidance from Major Donor Lab to help you strengthen your major donor programme and build better donor relationships.