CAMPBELL & COMPANY

QUALIFYING DONORS: BEST PRACTICES, COMMON CHALLENGES, AND REFLECTIONS FROM THE FIELD

A CAMPBELL & COMPANY STUDY

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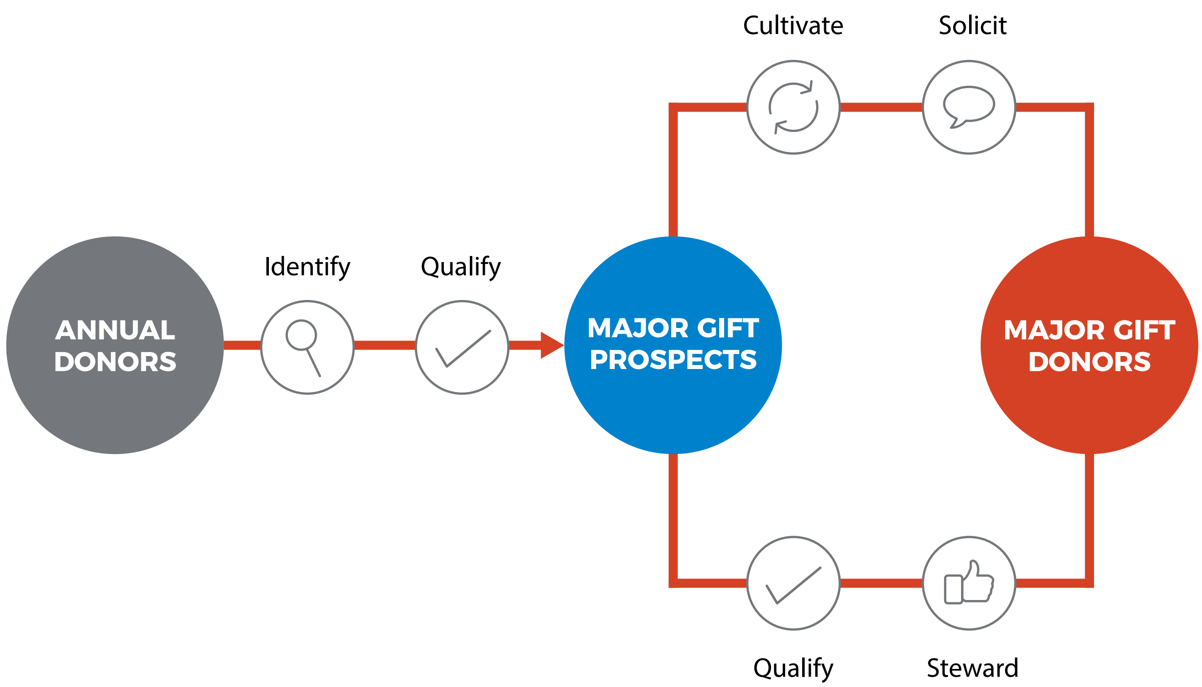
INTRODUCTION

Qualification—the active dialogue with a prospect that helps you better understand their capacity, linkage, interest, and inclination to support your organization—is an increasingly important component of an effective fundraising program. But despite its inherent value, few organizations dedicate the time and resources to create a qualification program—or implement qualification activities—grounded in best practices.

To address this gap, Campbell & Company spoke with organizations across sectors with a range of qualification experience and practices. This study identifies common qualification themes and challenges from our research alongside best practices from our firm's experience. Qualification services are a key element of Campbell & Company's approach to prospect management and development with our partners. We conduct qualification outreach for clients, and we advise on qualification best practices and strategy during our counsel relationships.

WHAT IS RELATIONSHIP MANAGEMENT?

To understand qualification, we must first define relationship management. Relationship management is the process of one-on-one engagement by which an organization builds supporters' understanding of and personal connection to a cause they care about, ultimately inspiring them to consider increased levels of philanthropic support. The relationship management cycle defines the stages through which a prospect moves, including five distinct stages that are illustrated below. Qualification is a critical stage in the cycle, dictating if assignment and deeper cultivation will likely result in increased philanthropic support.



WHAT IS QUALIFICATION?

A qualification program is designed to learn more about a prospect, allowing fundraising staff to answer questions about the prospect's interest in supporting the mission in a more significant way. The prospect's answers guide the decision to move the prospect into active management or disqualify the prospect from a higher level of cultivation. Effective qualification can take many forms. It is common to qualify prospects new to the organization or donors who currently give within mid-level or annual giving ranges and may have the potential to upgrade their giving. Team members can also integrate qualification into their existing outreach, such as thank you calls to donors who have made a recent gift.

Qualification programs may be informal, defined by goals and metrics shared across the development team, or formalized with goals and metrics owned by dedicated staff members. While qualification is most effective via a one-on-one dialogue in person where possible, it can also be conducted through a video or phone conversation, survey, or interaction at an event.

WHY QUALIFICATION?

A donor to the National Park Foundation had been giving for several years. Their largest gift to date was $7,500. Yet, through collaboration with the research team, the National Park Foundation knew the donor had the capacity to give more. A regional gift officer conducted a qualification visit and, through asking routine questions about the donor's interests and motivations, found out there was a match between the donor's favorite national park and an urgent funding opportunity. The donor said yes to a $300,000 solicitation to permanently conserve an important piece of land for public recreational access.

Not every qualification attempt yields such immediate returns, but the benefits do accumulate over time. For larger, more mature organizations with a robust donor base like the National Park Foundation, initial outreach will likely result in connecting with donors ready to make a significant gift while also building the pipeline for the future. For organizations with a smaller pool of prospects and donors, qualification can help to prioritize and upgrade prospects. For organizations that leverage wealth data, qualification can be an important tool to use alongside screening and capacity ratings, helping to manage leadership's expectations about how much philanthropic support is available to the organization. In nearly every case, qualification helps diversify revenue streams and makes effective use of precious staff time and resources.

As campaigns increasingly become a fixture in the nonprofit environment, organizations are seeing heightened donor fatigue and searching for the next big donor to support short- and long-term fundraising success. And during crisis moments when fundraising programs are experiencing declines or spikes in revenue, qualification can promote continued growth and sustainability. No matter the fundraising environment, organizational size, or sector, qualification is an organization's insurance plan for their donor pipeline.

OUR RESEARCH

INTERVIEWS

To conduct this research, we spoke with leaders at 17 organizations across six sectors. These organizations represent established and developing qualification programs as well as programs leveraging internal and external resources.

Each hourlong interview covered the organizational context, the evolution of qualification efforts, leadership and staff's role in qualification, key trends, and long-term goals. The organizations included:

Arts and Culture

- The Museum of Flight | Seattle, WA
- Wolf Trap Foundation for the Performing Arts | Vienna, VA

Environment

- National Parks Conservation Association | Washington, DC
- National Park Foundation | Washington, DC
- The Trust for Public Land | San Francisco, CA
- World Wildlife Fund | Washington, DC

Healthcare

- The Children's Inn at NIH | Bethesda, MD
- Rush University Medical Center | Chicago, IL
- Sarasota Memorial Healthcare Foundation | Sarasota, FL

Higher Education

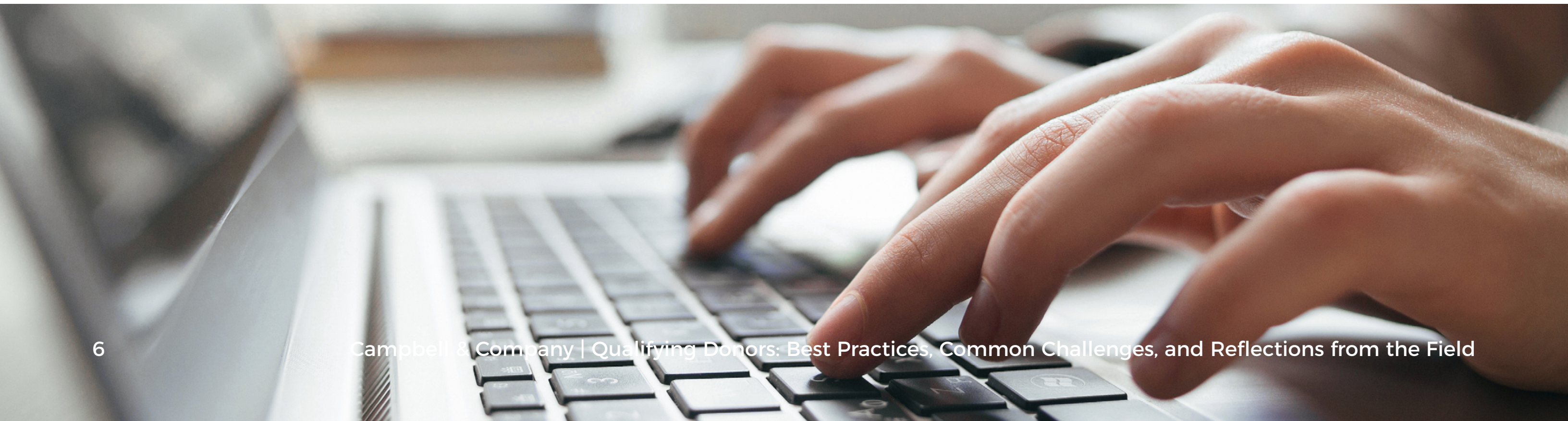
- North Central College | Naperville, IL
- University of Washington | Seattle, WA

Human Services

- Catholic Extension | Chicago, IL
- IGNITE | Oakland, CA
- Los Angeles LGBT Center | Los Angeles, CA

Independent Schools

- St. John's College High School | Washington, DC
- St. Paul's School for Boys | Brooklandville, MD
- Worcester Academy | Worcester, MA



INTERVIEW THEMES: TRENDS AND CHALLENGES IN THE FIELD

The following themes emerged during our interviews and cut across sectors. We found the challenges and opportunities these organizations faced were not tied to sector but, rather, were closely related to the maturity of fundraising operations and the structure of the qualification program and activities.

These themes also helped inform our "Qualification Best Practices," which can be found later in this study.

THE BUILDING BLOCKS OF A QUALIFICATION PROGRAM

Buy-in from leadership. For many organizations, support from board and executive leaders helped ensure that the development team had the time and resources to build a successful qualification program—understanding that an investment today will pay off in the future. For World Wildlife Fund, a financial investment in the development operation by the Board of Directors created the space to focus on qualification.

"Once the Board was committed, the first thing we did was build out the strategic services team, which included the research and prospect management teams. That was crucial to changing the way we identify and qualify donors—it wouldn't have happened without them." - Rhonda Barnes-Kloth, Vice President, Individual Giving, World Wildlife Fund

Patience and expectation setting. Because qualification efforts rarely yield results immediately, nonprofit leaders found that success required patience, discipline, and commitment. For example, the National Park Foundation noted that it could take 6 to 36 months to close a major gift as a result of qualification efforts, and a sustainable approach to qualification required clear communication about expectations for metrics and goals upfront.

"We want to shoot for the stars—but do it sustainably." - Valerie Kind, Vice President, Major Gifts, National Park Foundation

Staff motivation. Several organizations stressed the need to create a culture that emphasizes the importance of qualification and includes metrics and goals that build accountability and motivation for staff. For example, the University of Washington's College of Arts & Sciences invested heavily in training for all major gift staff to build skills through a cohort model, focusing on role playing, understanding the donor mindset, and the relationship management process. This helped embed a culture of participation and created the feeling that staff were working together toward the same goals—which included an emphasis on qualification.

Sarasota Memorial Healthcare Foundation learned that as the major gift program is developing, their prospect research can help identify donors for qualification, but the major gift team must play a more significant role in prioritizing these prospects for outreach. As a program is beginning, the major gift team members' expertise will help to support efficient qualification outreach.

The role of campaigns. Campaigns often prompted organizations to start qualification work or double down on efforts because of the need for more donor engagement. These major fundraising initiatives generally focus on a specific project, action, or movement. Through campaign-focused communications, organizations can excite constituents, reconnect with longstanding supporters, and identify new donors.

"Our comprehensive campaign focused on more deeply engaging our natural constituencies...it was the impetus for doing this work." -Trip Switzer, Vice President of Development, The Museum of Flight

THE CHALLENGES

Limited staff time. Many organizations cited staff who lacked bandwidth to maintain consistent—and persistent—follow-up activities to reach a prospect for individual qualification conversations. IGNITE, a 10-year-old organization with significant ambitions for growth, explained that there was a constant tension between the need to bring in current use dollars and the need to upgrade donors through qualification efforts that may not bear fruit immediately.

Fundraising staff often have many competing priorities, and qualification efforts can add more to an already long list. With a lean fundraising team, The Children's Inn at NIH identified creative ways to infuse qualification into standard outreach, such as thank you calls, to get to know donors and provide personalized outreach that leads to quality qualification.

Staff morale and turnover. Qualification relies on a high volume of outreach. This means that to get to a "yes" response to a request for a qualification conversation, fundraising staff must face many "no" responses. This was particularly challenging for organizations with self-described "transactional" programs where, for example, donors may be used to responding to direct mail solicitations as their only form of interaction. Staff turnover also proved to be a major issue, leading to stagnant portfolios and duplicative efforts to re-qualify individuals who lost a relationship manager.

"It's not unusual for it to take eight different approaches to get in front of someone. When you do, they often say, 'Oh, I do want to meet you.'" – Jillian Pinkard, Campaign Director, St. Paul's School for Boys

Lack of built-in constituency for some organizations. Some organizations have a natural pool of constituents to qualify, from higher education and independent school alumni to members of arts and cultural institutions and professional associations. At these types of organizations, development teams must focus on moving their constituents from a transactional relationship (I get this benefit because I spent that amount of money) to a deeper, more meaningful relationship grounded in connectivity with the mission.

Organizations without a built-in constituency faced a unique set of challenges. Senior Managing Director of Development Evelina Erickson of National Parks Conservation Association summed it up in this way: "We have members who believe in the cause, but they don't feel that same sense of place like you would with an alum. So how can we think more creatively about engaging other volunteers or individuals who support the program?"

Human services organizations also face similar challenges. There is often not significant overlap between their donors and their service recipients, which can make it difficult to identify a pool of prospects for qualification.

THE PROCESS

Analytics. For many organizations, analytics play a critical role in guiding who to qualify. At St. John's College High School, the development team uses a screening vendor to screen new families each year and makes qualification plans based on the results.

Even when some organizations lacked a defined budget for qualification, investments in analytics programs helped to prioritize and facilitate qualification activities. Organizations leaned on modeling scores and other analytics strategies to help pull out the best prospects for qualification. This approach can be particularly helpful for organizations that do not have a defined qualification program or that distribute qualification activities across teams.

Staff partnership. Effective organizations lean on the critical partnership between prospect researchers and frontline fundraising staff to help identify the right prospects for qualification. At one organization we interviewed, a prospect researcher shares 10 prospects each week with the development coordinator, driving consistent qualification work.

Team approach. While some organizations had a single staff member dedicated to qualification, most had some form of an integrated team approach, where each development team member shares some responsibility and thus, the entire team shares accountability.

At Wolf Trap Foundation for the Performing Arts, a coordinator on the leadership giving team facilitates the qualification process. The coordinator works with frontline fundraisers to help identify prospects who align with their portfolio goals. For example, the leadership giving officers look for high-net-worth individuals who have made mid- to high-level major gifts to the organization, while a member of the planned giving team seeks individuals with long-term consistent giving history at the organization. Then, the coordinator recommends prospects from the database and sends them to the appropriate relationship manager who determines next steps for qualification. If the relationship manager determines, through research and outreach, that the prospect is not a fit for their portfolio, they either disqualify the individual or move them onto a different track.

Flexibility. While an intentional commitment to qualification is critical, organizations shared the importance of adaptability in the qualification process. Team members appreciated the ability to tailor their approach to each relationship rather than stick to a rigid formula for outreach. Instead of following a step-by-step questionnaire, Worcester Academy uses a call report that helps drive qualification conversations in a flexible way. Team members fill out what they learned about the prospect across several categories: their experience with the Academy, financial capacity, philanthropic tendencies, and other relevant personal information. In this way, conversations are flexible and tailored to the prospect, but the goal of qualification remains the same.

Events. Events were raised as a critical touchpoint and engagement opportunity for qualification and pre-qualification. When Catholic Extension was having trouble connecting with prospects one-on-one, their team developed a strategy that brought people together through small to mid-size hosted events around the country. They enlisted peers to motivate others to attend. The Trust for Public Land focused on experiential events like trips into nature to bring new names into the fold or prioritize prospects already in the pipeline.

External partners. Several organizations lifted up the role of external partners in qualification work, especially when development departments were already stretched. The Los Angeles LGBT Center found value in having an external consultant direct qualification efforts, lending focus and structure to the program and sharing new qualification strategies with staff. External partners can put structure in place as you develop a program and, depending on your team's makeup or current bandwidth, can also lead qualification outreach.

THE METRICS

Delayed goal setting. Many organizations with whom we spoke were actively qualifying prospects without clear, defined goals for qualification. One interviewee referenced challenges related to a lack of formal qualification metrics: staff prioritized outreach to lower-level donors who were likely to make an immediate gift rather than colder prospects who might make larger gifts down the road. Various issues got in the way of formalizing metrics, including limited staff capacity, investment from leadership, and database issues.

Emphasis on contacts vs. dollars raised. We also heard from organizations that measure qualification performance based on contacts completed (like visits, phone calls, and even email outreach) over dollars raised or number of qualified donors. This approach prioritizes effort over outcome—keeping in mind the high volume of outreach and often-delayed return on qualification—with the idea that a positive outcome will follow sustained effort by staff who are evaluated against realistic measures.

QUALIFICATION BEST PRACTICES

FUNDAMENTAL ELEMENTS OF A QUALIFICATION PROGRAM

An effective, sustainable qualification program that can deliver increased donor engagement and dollars raised over time relies on the following components:

Staff Resources | Training | Metrics | Technology & Tools | Leadership

Below, we describe each component based on our research and our firm's nonprofit fundraising experience.

Staff Resources

A strong qualification program relies on a team with shared expectations of the goals, activities, and metrics behind a broader strategy. While certain organizations can benefit from having dedicated frontline team members focused on qualification outreach—like those with natural constituencies or a large volume of prospects—qualification success does not depend on it. Rush University Medical Center has leveraged different strategies to support the qualification of donors—including its grateful patient program—but each strategy has relied on collaboration across teams, including major gifts, annual giving, and prospect research.

Every development team member should understand the value of qualification and how it fits within broader organizational goals. Across all organizations, one management team member should be responsible for developing and overseeing the qualification strategy and acting as the ambassador for both internal and external buy-in.

Team responsibilities may look like this:

- **Setting the vision and ensuring there are dedicated resources:** led by executive/senior leadership team members and potentially volunteer leadership. This could be the executive director or the senior development leader.
- **Leveraging prospect research, database management, and report creation:** led by individuals who have prospect research and database responsibilities. This could be a dedicated prospect researcher or

database manager, or any member of the development team responsible for researching prospects and updating the database.
- **Connecting with potential prospects:** led by staff who have frontline fundraising responsibilities. This could be a major gift officer, a development associate, or even the executive director depending on how your organization manages responsibilities.

For organizations without dedicated qualification staff, all frontline fundraisers should have a segment of donors they are responsible for qualifying each month or quarter, depending on the volume of qualification activities a team can conduct and the depth of the prospect pool. This can range from 20 percent or more of a portfolio for an organization just beginning qualification outreach or with a deep pool of prospects to 10 percent for an organization with consistent qualification outreach. This is often the most active portion of a development officer's portfolio, with prospects moving in and out of assignment regularly.

Since qualification is less focused on relationship building and more about quickly assessing a prospect's inclination and capacity, frontline staff may face some initial challenges with this work (see "The Challenges" section on pages 8-9). Addressing these challenges and providing frontline fundraisers with coaching and guidance is necessary.

Qualification can be leveraged as a distinctive opportunity to develop staff at all stages of their careers. The flexible and varied nature of qualification work can help support strong, motivated teams. Below are several examples of team members who may be a good fit for qualification work:

- Qualification may serve as a good entry point into development for individuals transitioning from other fields, such as sales, where broad outreach and relationship management are critical.
- Staff members who wish to move from other departments or teams into a frontline fundraising role can focus on qualification as an opportunity for learning, training, and advancement.
- Senior team members who wish to shift to part-time work can lean into qualification, which is suited to more flexible work arrangements.
- In arts and cultural organizations, qualifying donors can be a great opportunity for team members who provide concierge services for donors. Similarly, in healthcare organizations, team members who focus on grateful patient programs are well-suited for qualification work.
- Development staff working remotely are in a good position to qualify donors.
- During slow periods, administrative staff can contribute to qualification work.

External partners can serve as a critical resource in building a qualification program. When staff bandwidth or lack of experience is a barrier, external partners with expertise in qualification can help ensure the work gets done and gets done quickly. A partner who can execute time-consuming activities, especially high volumes of qualification calls and prospect research, can be especially useful during periods of change, like major staff transitions or an influx of donors. Partners may also take a capacity-building

approach via a consultant who will work alongside an organization, helping build the program, lay the groundwork for the strategy, coach staff, and set benchmarks.
When considering an external partner, organizations should take stock of their unique situation, including their budgetary constraints, staffing structure and capacity, expertise, and goals. Identify partners who supplement established strengths and can help improve areas that are challenges for the organization. Some organizations need help conducting direct outreach, while others need guidance developing their overarching qualification strategy. Whatever the focus, organizations should work with partners to set shared, measurable goals.

Volunteers and other constituents can support qualification work. Volunteer leadership (such as board members) are likely most effectively leveraged for their networks and connections to prospects—not qualification outreach itself. However, other volunteers like student callers or alumni groups in higher education and independent schools, active development committees, or other specialized volunteer groups can be engaged in qualification outreach. These volunteers can integrate qualification questions into existing outreach, especially thank you calls.

Training

Consistent training is a critical component of any qualification program, and it should be tailored to each organization's needs. The level and intensity of training should be relative to the size of the organization. Training formats can vary from informal internal coaching and mentoring to formal partnerships with outside vendors that use a structured training approach. Across all formats, training should reinforce the importance of qualification efforts.

As a large, complex organization, the University of Washington benefited from the systematic approach of outside consultants who could bring their curriculum to fundraisers across several units. On the other hand, IGNITE, a 10-year-old, growth-oriented organization, needed to build an internal culture of training first and partnered with Campbell & Company as a coach and resource to respond to needs as they arose.

Identify internal ambassadors who can help ensure training is successful and embedded in a culture of learning. The University of Washington decided to start with training their top fundraising leaders to become well-versed in the qualification philosophy and curriculum. This helped ensure success and buy-in when eventually expanding to the 200 other frontline fundraisers across department units. Smaller organizations looking to make a modest initial investment can replicate this approach by focusing training on key fundraising leaders. As qualification efforts grow or when they see a significant influx of new donors, they can expand that training to other staff members who might be involved in the work.

Metrics

Qualification is a long-term investment and should be measured as such. An investment in qualification is never just that—it is an investment in your fundraising program for the long haul. Organizations should be realistic with their expectations—it will likely take many months before an organization begins to see returns in the form of upgraded annual gifts or new major and planned gifts. Organizations interviewed cited a 24- to 36-month timeframe before qualification resulted in a major gift. World Wildlife Fund noted that many factors account for this variance. For example, more personal settings (e.g. in-person conversations) can shorten the timeframe, while challenges like staff turnover can lengthen it.

As such, organizations will be better positioned by measuring success in actions that encourage consistent qualification, rather than immediate revenue. This will also help to reaffirm your connection with a prospect and their increased inclination to make a gift. We recommend organizations set targets for each team member conducting qualification and review those targets on a regular basis.

In addition to revenue, metrics may include:

- Visits (in-person or by video)
- Contact attempts, measuring phone calls, video calls, mail, and/or email
- Conversations secured through contact attempts (phone calls, video calls, or email exchange)
- Solicitations (both number and dollar amount of those solicitations)
- Number of closed gifts and upgraded gifts
- Number qualified and disqualified prospects

Some contacts are more valuable than others, so aim for more substantive ones. Visits (whether in-person or by video) and two-way phone calls represent the most valuable contacts and most effective way to have a conversation with a prospect about their giving. However, qualification—and more importantly disqualification—can begin with a voicemail, a mailing or forwarded email with a personal note, a survey, or a social media tag. A multi-channel approach to outreach is key. You can also get creative by calling at different times of the day, not leaving a voicemail every time, and experimenting with different email strategies, such as forwarding a general stewardship email with a personalized message at the top.

Above all, honor the prospect's preferences: if they would rather communicate by email than meet for a conversation over coffee, you should follow their lead.

Most contacts with a prospect fall into one of three key categories:

- **Touchpoint:** A contact that keeps a relationship open and creates opportunities for future dialogue. Activities like social media tags, mailings or forwarded emails with a personal note, one-way emails, and sending a survey are touchpoint examples.
- **Purposeful contact:** A contact that reinforces and/or advances the relationship with an individual because it has the "quality of conversation" and brings an individual into deeper contact with the organization's work. Two-way email communication, survey participation, and small event attendance (whether in-person or virtual) are examples of purposeful contacts. After an event, staff and volunteers should debrief and record information from conversations.
- **Substantive contact:** A contact that actively brings a prospect through the relationship management cycle towards solicitation and closure of a gift. This contact is usually part of a larger strategy tailored to this individual prospect's interests and inclinations. In-person and virtual meetings are examples of substantive contacts.

Be precise about how you disqualify a prospect. Ensure there is a clear process for "disqualifying" names and recording disqualifying information, as well as outlining criteria for putting prospects into non-major gift portfolios (e.g. annual fund, invitations to events). We recommend setting a 90-day time limit for keeping donors in qualification. Be selective with this criteria and be prepared to disqualify more prospects than you qualify—this is normal. Clear, consistently applied criteria will ensure each prospect is appropriately managed, receives the right communications, and is invited to the right events even if they are not qualified for upgraded giving or as a major gift prospect.

Moreover, it is important to remember that, in the future, a disqualified prospect may be ready for qualification that leads to a different outcome. Keep in mind that prospects can be temporarily disqualified, and an organization should review their pool of disqualified prospects (at least annually) to determine if it might be appropriate to qualify again.

The Trust for Public Land found that, without effective systems for tracking who was disqualified and why, staff were spending too much time reviewing disqualified prospects. Development leaders made it their goal to hasten decision-making on disqualification with better tracking and systemization.

Technology and Tools

Invest in the core tools that help you manage, track, and update your data to support up-to-date qualification work. These include but are not limited to:

- **Database:** Ensure you have a basic tool that staff can use to easily track gifts, gift history, relationship management activity, steps, and the time spent in each stage of the relationship management cycle. When the database is used correctly, the information tracked facilitates collaboration across teams.
- **Wealth screening and capacity analysis:** Get a deeper look at key wealth indicators in your database to help prioritize qualification work.
- **Prospect research tools:** Pursue further tailored research on a prospect's linkage and inclination toward giving in preparation for outreach and communication.

Consider the opportunities—and challenges—of analytics. A capacity analysis or wealth screening exercise can be an invaluable window into the potential giving of your database. For IGNITE, it unearthed critical current and future prospects for its ambitious growth plan. Furthermore, IGNITE was able to identify significant capacity in its donor base—which allowed the organization to create plans to cultivate larger gifts from existing donors.

However, these tools only capture a moment in time and require a quick response and a thorough plan for cultivation to be effective. The older the screening or capacity information, the less useful it is for identifying prospects for qualification. Keep in mind that these resources require the right training, staff time, and often prospect research tools to learn more about prospects' interests and giving history. You should consider these factors when planning for qualification in your budget.

If your organization does not have the budget for wealth screening, consider developing a Recency, Frequency, and Monetary (RFM) score. RFM scoring creates an indicator that helps to identify donors demonstrating the strongest giving patterns and will help to focus your qualification outreach. Learn more about developing and using RFM scores here. You can also develop an engagement score, which helps you look beyond giving patterns to determine an individual's engagement level with your organization. Learn how to develop and use engagement scores here.

Track conversations appropriately in your database. Adequate and timely data entry ensures that all staff have access to clean information and reports. This allows an organization to track progress against defined metrics, understand when it should re-qualify prospects (if appropriate), and implement the most effective strategy for qualified prospects. When conversations are appropriately documented in the database, they also act as a bridge between a departing team member and a new one. With detailed notes, this new team member can more easily pick up where their predecessor left off.

Leadership

Communicate the value of qualification to leadership by tying it back to the importance of upgrading donors. Ensure that staff conducting and managing the qualification program maintain a consistent line of communication with leadership: setting and managing expectations around outcomes, re-iterating the role in upgrading donors, and demonstrating value in the short and long term. This can be especially useful to leaders following a campaign, when there is a unique opportunity to leverage momentum and build a more engaged donor base for the long term.

In analysis following the National Park Foundation's recent campaign, the Foundation found that its fundraising efforts were strong in nearly every area—direct response, corporate giving, foundation giving—yet the largest opportunity was in the major gift area. With an influx of new direct response and mid-level donors from the campaign, there was potential to engage donors more deeply. This finding has prompted the Foundation to build out its major gift program, and qualifying donors is a key part of that work.

Strategically leverage volunteer and staff leaders for qualification activities. Executive leadership and volunteers, including board members, can be critical partners in qualification work, from reviewing prospect lists and identifying prospects based on personal networks and connections, to adding personal touches to qualifying activities, like a personal note or event invitation. For example, National Parks Conservation Association sent an introductory letter from the President, thanking the prospect for their support and introducing them to the development team member who would be following up to learn more about what motivates their giving to the organization. Engaging leaders in a focused, strategic way can increase the responsiveness of prospects who may be encouraged by the leader's involvement.

RESOURCES YOU CAN USE IN YOUR OWN QUALIFICATION WORK

How Donors Move Through the Qualification Process

STEP 1

Prospect is identified through two key pathways:

Organization leverages analytics to evaluate the capacity of their constituent base. The results unearth a number of potential prospects.

A prospect makes a connection to an organization through an introduction, event, or first gift.

STEP 2

Prospect researcher flags prospect as someone with potential based on capacity and/or affinity.

Send name to frontline team member for qualification.

STEP 3

Development team member secures qualification conversation through one or more contact attempts.

STEP 4

Development team member conducts qualification conversation and determines whether to disqualify or cultivate further.

STEP 5

Team member conducting the outreach updates database with conversation notes, updated status (cultivate or disqualify), and any relevant adjustments to the prospect's outreach preferences.

If marked "cultivate," prospect is considered active and a cultivation strategy should be developed accordingly. This may include shifting a prospect to the event or high-level annual giving outreach pool.

If disqualified, prospect goes into inactive pool. They are considered for re-engagement at a later time or when they indicate they are ready for more engagement.

Sample Qualification Questions:

Q. If you want to know more about a prospect's commitments and priorities outside of your organization: How are you spending your time (when you're not working, etc.)? Where else are you involved, how did you come to get involved, and how do your various interests fit together?	**Q. If you want to know more about how a prospect views their relationship with your organization:** What do you value most about us? What do you feel has been a high point of your relationship with the organization? For first-time donors: What motivated you to make your first gift to us? What do you hope the impact of that gift will be? For loyal, long-term donors: What motivates you to keep giving?	**Q. If you want to know more about what projects or engagement opportunities might interest the prospect:** Are there initiatives you would like to learn more about or be more involved in? Is there an event or volunteer experience you've wanted to participate in but haven't yet had a chance to?

CONCLUSION

With a defined system that holds your team accountable to intentional outreach and is tailored to your needs, any organization—regardless of size or sector—can implement a successful qualification program. Consistent qualification efforts will contribute to a healthy pipeline of potential donors. Doing so could be the difference between a stagnant fundraising program vulnerable to the threat of change and a sustainable program ready to upgrade donors and deliver more powerfully on its mission.

To discuss this research or learn more about Campbell & Company's qualification services, please contact the study leads:

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