

# Major Gift Process

Prospect Research

Target/Priorities Lists

Prepare/Set Visits

Prospect/Donor Meeting  
Goals– Educate, Engage and ASK

Not Ready For The ASK OR  
You Get a NO or MAYBE

Ready For The ASK  
and YOU ASK

## Meeting Response Options

**No**

Thank

Ask To Inform\*

Ask For Referral

Do Thank You Letter

\*Add To Mailing, Invite,  
ETC.

**Maybe**

Thank

Ask To Inform\*

Ask For Referral

Determine What Info &  
When to Follow-Up

Do Thank You Letter

Confirm Follow-Up Details

\*Add To Mailing, Invite,  
ETC.

Bring Back To Staff &  
Committee

Follow up as Promised

**Set Next Appointment**

**Repeat Process**

**Yes – But Later Gift**

Thank

Ask To Inform\*

Ask For Referral

Determine When Gift To  
Be Paid & How Much

Do Thank You Letter

Add Invoice

\*Add To Mailing, Invite,  
ETC.

Board Member Calls To  
Thank

Periodic Check In

Personal Invite to  
Engagement Activities

**Yes -- Now**

Thank

Ask To Inform\*

Ask For Referral

Determine When Gift to Be  
Paid & How Much

Do Thank You Letter

Add Invoice

\*Add To Mailing, Invite,  
ETC.

Board Member Calls To  
Thank

Periodic Check In

Personal Invite to  
Engagement Activities