



## D.E.W. Donor Evaluation Worksheet

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.\*\*\*\*\* The Donor Evaluation Worksheet is a tool designed to help you rank your donor prospects and to prioritize your time. You need to spend a disproportionate amount of time with the donors most likely and most capable of giving you a major gift. The Donor Evaluation Worksheet helps you ensure you're spending the most time on your best prospects. You should evaluate each donor and give them a score, from 1-10 on these 3 criteria.

**We use three criteria for ranking donors.**

**-Financial Capacity**

**-Cultivable Interest**

**-Philanthropic Disposition**

Of course having financial wealth is required for someone to give a major gift. But we've seen donors with more modest wealth far outgive much wealthier donors because they had more cultivable interest or because they were more philanthropically motivated. Some people are just givers.

**Financial Capacity-** is estimated based on what you know about the donor and their ability to give a major gift. What could they give if they were absolutely head over heels in love with you? This is not what they are likely to give, but what they could give if they were so motivated.

**Cultivable Interest** -is based both on their general interest in the type of work your organization is engaged in and your ability to have access to this person to cultivate that interest. So you may know that someone is interested in organizations engaged in the type of work your organization is involved in, but if you don't have access to this person, you would have to score them low in this category.

**Philanthropic Disposition-** has to do with whether or not someone is just a giver. Some people love giving! These people give beyond their capacity. They often out-give people who are of much higher net-worth because for them giving is a very emotional act. We recommend that you review the DEW Scores of your donors twice a year. Of course you cannot change a donor's financial capacity, but you can ask yourself if you have learned anything new that would change their score. You also can't change a donor's philanthropic disposition, but you can ask if new evidence has come to light that would change how you previously scored this donor in this area. You do have the ability to impact a donor's Cultivable Interest. With this score, you have to ask yourself if you have done everything in your power to move this donor closer to your organization and give yourself an honest answer to this question. If you have done everything in your power to move the donor's score up in this area and nothing has changed, you may consider that perhaps your organization is not the best fit for the donor. If you have not done everything in your power, recommit yourself toward those efforts.

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