

Portfolio Segmentation



Values-Based Major Giving Academy

As your portfolio matures, consider segmenting your donors so you can batch your work and find greater ease.

Segment 1	Segment 2	Segment 3
Donors for whom you're working toward asking for a gift that is double (or more) their largest gift to date	Donors for whom you're working toward asking for an increase of about 50%	Donors who are making their most personally significant gifts
10-15% of your portfolio	15-20% of your portfolio	65-75% of your portfolio
50-60% of your time	10-20% of your time	10-20% of your time
Ask annually for a gift	Ask annually for a gift	Ask annually for a gift
Segment 1 will include donors who are newly qualified and some who have been in your portfolio a while. Focus on creating the environment for fundraising, building trust, and agitating with love.	Focus on creating the environment for fundraising, building trust, and agitating with love.	Further segment this group by interest area or time of year they give to streamline your work. Work with this group will become more organic – they'll reach out to you when they need something, and you'll think of them when something happens that would interest them.