



# Roman Catholic Foundation

of  
EASTERN MISSOURI

## Assessing Your Planned Giving Prospects

While there is no exact science to determine your best planned giving prospects, the categories below may guide your solicitation efforts. Tally each donor’s “points” and review the scoring metric to identify your top prospects.

### CATEGORY POINTS

#### Age

80 and over.....	3
70 and over.....	2
60 and over.....	1
Under 60.....	0

#### Engagement with Organization

Volunteer or Board Member.....	3
Past Volunteer or Board Member; still engaged.....	2
Past Volunteer or Board Member; no longer engaged.....	1
No history other than as a Donor.....	0

#### Giving History

9 of last 10 years (or more) .....	3
7 of last 10 years.....	2
5 of last 10 years.....	1
Less than 5 of last 10 years/sporadic giver .....	0

#### Marital Status

Single .....	3
Widowed.....	2
Married .....	1

#### Family Status

No children .....	3
One child .....	2
Two or more children.....	1

### SCORING METRIC

Best candidates.....	10-15 Points
Potential candidates but will require nurturing.....	8-10 Points
Least likely to consider a planned gift but continue engaging.....	0-7 Points

*FOR PARISHES: [Please click here](#) for instructions on extracting and assessing planned giving prospects from Servant Keeper.*