



PILOT PEAK
CONSULTING

MAJOR GIFT MAGIC: NAVIGATING DATA AND DONORS

APRIL 27, 2017

- Major Gifts Overview
- Moves Management
- Activity
- Q&A

MAJOR GIFTS OVERVIEW

Research

Trained
Volunteers

Cultivation
Strategies

Compelling
Case

Stewardship
Plan



MAJOR GIFTS OVERVIEW

Fundraising Income	Low-Level Donors	Mid-Level Donors	Major Donors
Under \$1M	\$1 - \$499	\$500 - \$4,999	\$5,000+
\$1M-\$10M	\$1 - \$9,999	\$10,000 - \$24,999	\$25,000+
Over \$10M	\$1 - \$14,999	\$15,000 - \$99,999	\$100,000+

MAJOR GIFTS OVERVIEW

Set goals
you can't
make

Rejection is
required

Mistakes are
mandatory

It's not a 9 to
5 job

You don't
have all the
answers

Don't get
comfortable

MAJOR GIFTS OVERVIEW

Engage
volunteers

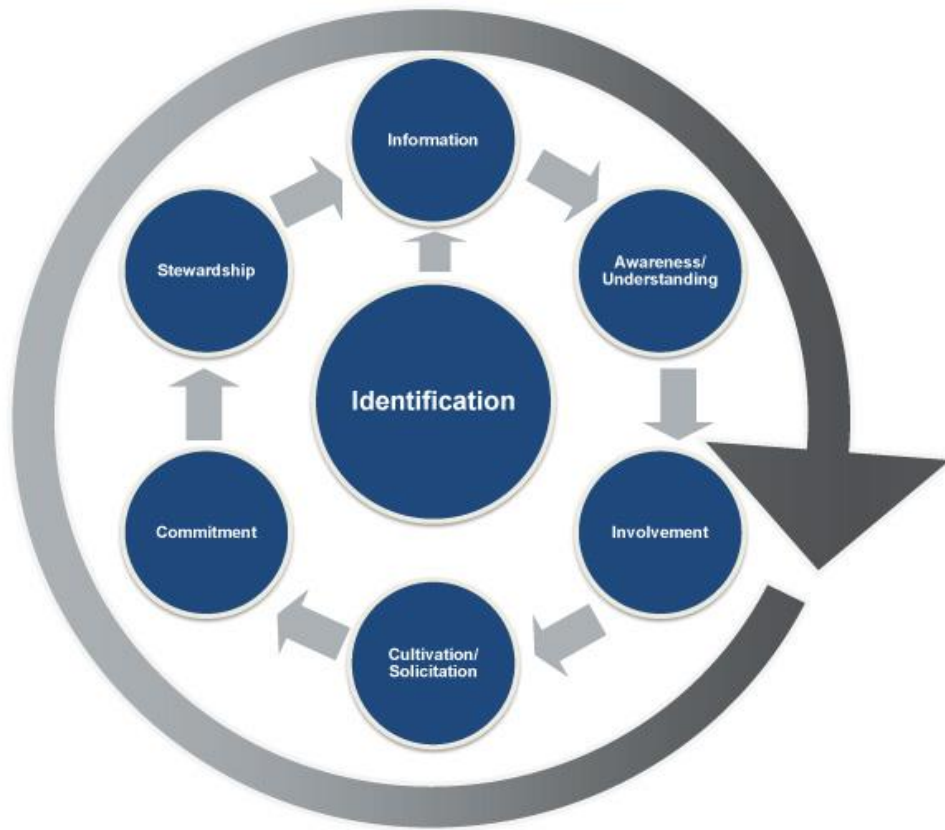
High ROI

Create
engaged and
passionate
donors

Obtain
significant gifts

MOVES MANAGEMENT

LIFE CYCLE OF A DONOR



Strategic

- Strategically identify a few key prospects
- Rate and assign prospects

Relational

- Guide relationship via tailored interactions
- Use high-quality contacts and actions
- Create an ever-deepening relationship

Relevant

- Plan ahead, but be flexible
- Create experiences

Detailed

- Record everything in your tracking sheets
- Manage the system; don't let the system manage you

MOVES MANAGEMENT

Prospect	Interest / Involvement (very = 5; cold = 1)	Ask Amount (\$)	Expected \$ / Date	Staff Manager	Next Action / Due Date	Action Following / Due Date
John and Jane Doe	4	\$50K	\$35K / 2-4 weeks	CDO	Ask scheduled / 7/1	Close Ask / 7/31
Mary Smith	1	TBD	TBD / 6 – 9 months	Dev. Assoc.	Cultivation plan being developed / 7/15	Schedule tour / 7/31
John Q. Public	2	\$5-25K	\$5K / 3-5 months	Annual Fund Dir.	Attending event / 9/1	Revisit cultivation and solicitation strategy / 9/15



- Database
- WealthEngine
- Google
- Nozasearch
- Anecdotal information (peer rating)



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