



**PILOT PEAK**  
CONSULTING

**MAJOR GIFT MAGIC: DATA + DONORS = \$**

October 24, 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

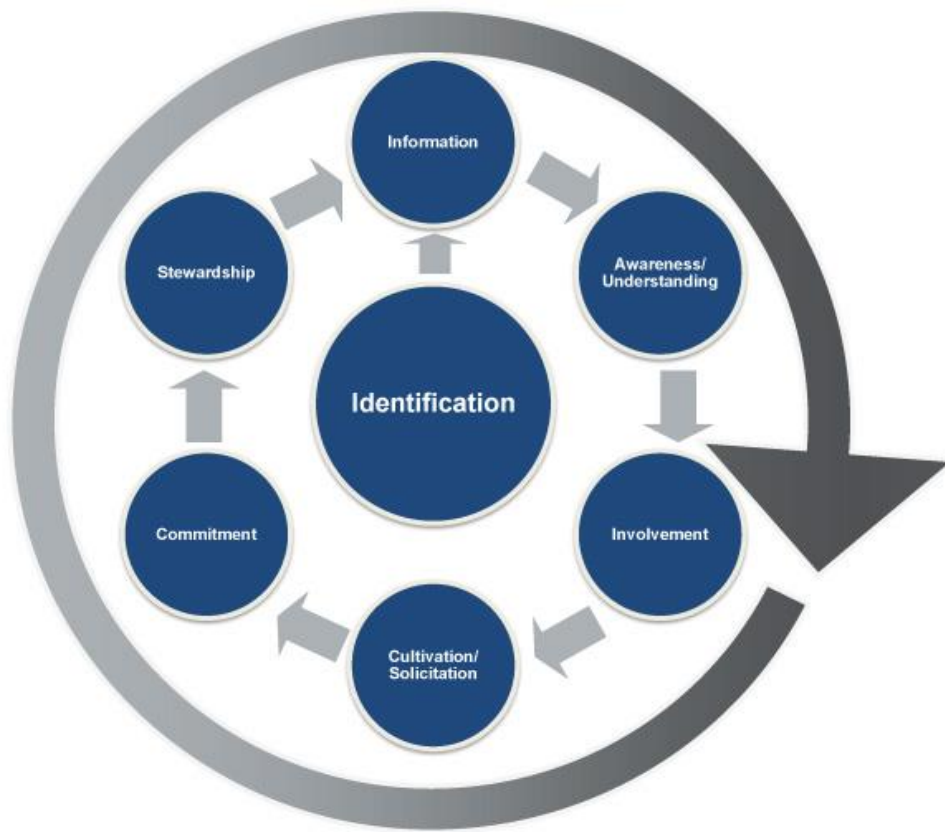
High ROI

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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Emma Gilmore Kieran  
Principal

Pilot Peak Consulting, LLC

E: [emmakieran@pilotpeakconsulting.com](mailto:emmakieran@pilotpeakconsulting.com)

C: (703) 772-7472