

# The Art & Science of Major Gifts:

*Harnessing Data and Human Connection to Find Your Next Big Donor*

## Presenters:



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# Agenda

**The Science of Major Gifts**

What is Wealth Screening

Your Database

Key Wealth Indicators

Relationship Tracking

Working with IT

Giving Stages

**The Art of Major Gifts**

Affinity and Ability

The Donor Mindset

Relationship Based Fundraising

Connecting With Donors

Do's and Don'ts of Engaging Donors

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# Getting Started

Where's the Money?

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## The Science of Major Gifts

How can data direct you to the right prospects?

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## What is a Wealth Screening?

A software solution that analyzes publicly available financial and philanthropic data to help nonprofits identify high-potential donors and prioritize fundraising efforts.

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## Wealth Screening Tools



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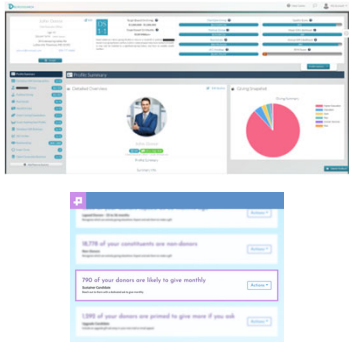
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Wealth  
Screening  
Tools



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Mining Your  
Database

Recent  
Engagement

Giving  
Behavior

Relationship  
Indicators

Gaps in  
Wealth Data

Prospect  
Development  
Priority

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Key  
Indicators

Wealth Screening Data	Your Donor CRM Data
Estimated Net Worth	Known giving capacity or gift history
Real Estate Holdings	Mailing address / homeownership status
Business Ownership / Employment Details	Occupation / employer from your records
Political Contributions	Past engagement in advocacy or civic campaigns
Charitable Contributions to Other Orgs	Donations to your organization
Foundation or Board Affiliations	Event participation or known affiliations
Lifestyle Indicators (luxury goods, travel, etc.)	Event attendance or interest tags

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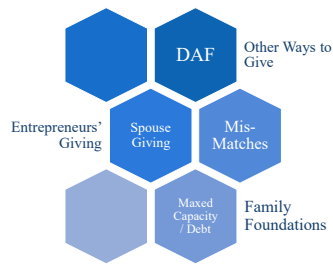
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## Other Factors to Consider



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## Relationship Management Tracking

### Working With Your It Department To Increase Capacity



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## The Art of Major Gifts

What doesn't the data tell you?

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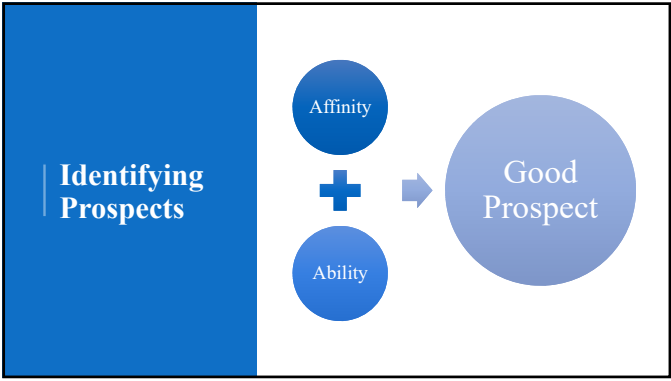
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**Affinity & Ability**

**Affinity**

- Do they support other causes related to your mission?
- Have they ever benefitted from your program or something similar?
- Do they live or work in your geography?
- Are they invested/concerned about your outcomes?
- Do you provide access to something they could benefit from?

**Ability**

- Are they a business owner or executive?
- Do they have a private foundation, DAF, charitable trust?
- What boards do they sit on?
- What are their hobbies and social activities?
- Do they belong to 'exclusive' clubs?
- Do they have a history of significant gifts?
- Do they own multiple homes or have other significant assets?
- Other – family, friends, appearance, vacations, etc.

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**Remember**

Big hearts are more important than big wallets

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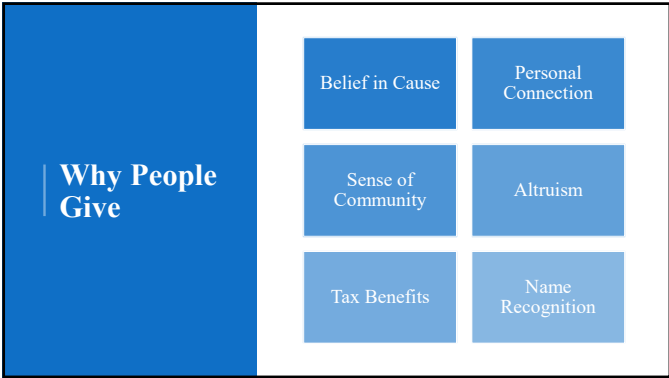
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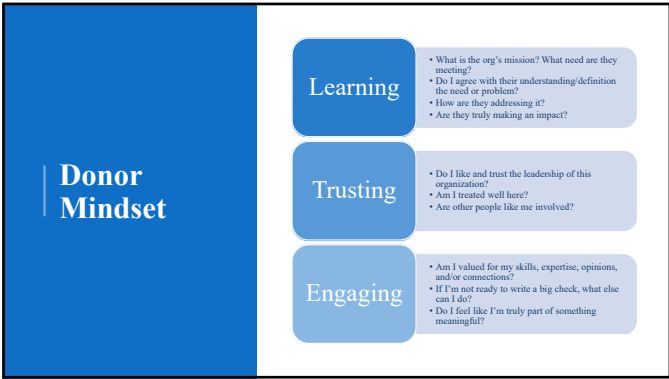
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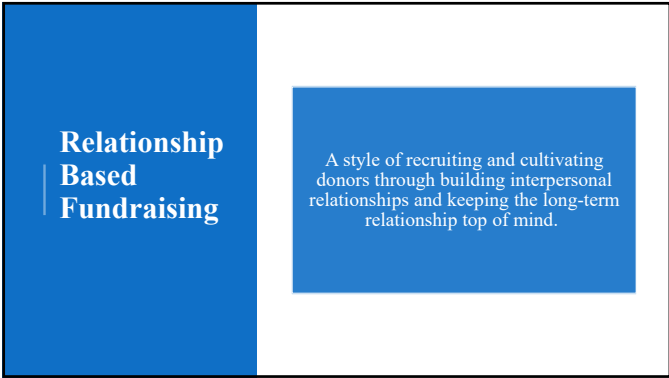
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Relationship  
Based  
Fundraising

- Increase Donor Retention
- Increases Gift Amounts
- Increases Goodwill

- Decreases Donor Turnover
- Decreases Donor Acquisition Costs

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Connecting  
With Donors

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Connecting  
With Donors

What is the donor passionate about?

What are their interests and motivations?

How do they like to be communicated with?

What is the best way to engage them?

Who else is important to their giving?

What level of gift are they capable of contributing now and in the future?

Who else do they know that could be helpful?

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# Connecting With Donors

Staff

- Program Managers
- Executive Team
- CEO

Board

- Event Intros
- Thank Yous
- 1:1 Meeting

Other Donors

- Why are they are supporting?
- How do I see myself fitting in?

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# Solicitation Do #1: Build Trust

People Give to People – Likeability is Important

Do what you Promised

Fulfill your Obligations

Remember Milestones

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# Solicitation Do #2: Stock Your Toolbox

Tours

Invite to events

Volunteer Opportunities

Awards

One-on-one meetings

Send notes, articles, newsletters

Connect to Leadership

Expertise

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Solicitation  
Do #3 & #4:  
  
Be Prepared &  
Set the Stage

Be Prepared

Research

Practice

Bring collateral

Know your follow-up

Set the Stage

Share the Purpose

Confirm the Appt

Go in Twos

Ask in Person

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Solicitation  
Do #5:  
  
Communicate  
Impact

Outputs are NOT Outcomes

- Focus on benefits
- What will be accomplished by working together?

Use Qualitative and Quantitative Information

- Different donors respond to different tactics
- Appeal to emotions and logic

Special Considerations

- Depending on gift size, may be more than one activity
- Involve board and leadership
- Naming opps, signage, etc.

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Solicitation  
Don'ts

Inadequate Preparation

Poor Listening

Not Building Rapport

Treating them like an ATM

Premature Asking

Not Connecting with Interest Area

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Thought for the Day

To truly win the hearts of donors, we must marry the power of data with the warmth of human connection.

Data shows us the path—but relationships give us the reason.

When we understand donors' stories as well as their statistics, we don't just earn a gift—we build a legacy.

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Connect with Us



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