

Major Gift “Prospect Evaluation Grid”™ (PEG) Model

(Based on J. Panas)

Financial Capacity to Give ↑	4 <i>High</i>				Ideal Ultimate Gift Prospects 4/4
	3			Major Gift Prospects 3/3	
	2		Target Market 2/2	Core Prospects 2/3	
	1	Weakest Prospects 1/1			
	0 <i>Low</i>	1	2	3	4 <i>High</i>
		Motivation & Cultivable Interest →			

Sample Guidelines for Assigning a Score

Score is expressed as two numbers: financial capability / motivation & interest.

Financial Capacity

- 0 = < \$10,000
- 1 = \$10,000 - \$99,999
- 2 = \$100,000 - \$499,999
- 3 = \$500,000 – \$999,999
- 4 = \$1 million and up

Motivation and Cultivable Interest

- 0 = no involvement with organization, related philanthropy, or charitable activity
- 1 = no volunteer involvement with organization; but annual fund donor or special event supporter, and/or current or past client’s family member
- 2 = multiple year annual fund donor, participates in some special events, or volunteers with a board or auxiliary; AND has positive opinions of organization, or long-time client or client’s family member, or affiliated in some other way
- 3 = continuous donor, active volunteer, or 4-figure donor (cumulative or single gift); AND speaks positively about organization
- 4 = active volunteer with organization entity or affiliate, passionate about the cause, and/or advocate for organization; AND previous major gift made and/or other involvement with organization