

## Moves Management ... A process and a tool

By Larry Becker, CFRE

**M**oves management is a process of planning a series of intentional steps (moves) to motivate a prospective donor to make their first charitable gift or to increase their giving to a higher level. In all cases the objective is to strengthen the relationship between the donor and nonprofit.

Moves Management is also a tool empowering the fundraiser to design and implement a plan of action for each prospect to increase their *personal contact* with the prospect. While all gifts and all donors are important, Moves Management also obliges the fundraiser and the organization to prioritize. Who are the donors who can make the greatest difference in moving the mission forward?

Moves provides an opportunity for staff to review and discuss appropriate strategies to take the donor to the next gift level. *Teaming among staff to develop strategies is highly encouraged.* Moves Management helps track activity involving each donor and create “institutional memory” within the organization’s database.

The strategy intentionally moves a donor through the *Five I’s of Fundraising*: Identify, Inform, Interest, Involve, Invest. It systematizes the Giving Cycle of prospect research, qualification, strategizing the approach, involving the prospect (cultivation), making the Ask, securing the gift and stewarding the prospect and the gift.

Moves management does not mean that the fundraiser must do everything. However, the fundraiser must make sure that it all gets done. Creating the right team may be the key to success:

- Identify **Natural Partners** – those people who know the prospect and can help advance the relationship with the organization. Natural partners provide information and help develop strategy, assist in strengthening the relationship and perhaps assist in the solicitation.
- Identify **Primary Players** – they have the best leverage and can advance the relationship. A primary player can be a natural partner. The CEO and/or the Board Chair who nurture the relationship, ask for the gift or provide for good stewardship are excellent examples.
- The Moves Manager is the fundraiser who works with the natural partners and primary players, monitors the prospect’s progress and ensures that the organization maintains sufficient and appropriate contact.

There can be three Moves lists. The lists are DYNAMIC and should be reviewed at least quarterly. A prospect may fall off for any number of reasons (death, the donor has other philanthropic priorities, their situation changes, etc.)

- **A List** – Individuals, corporations, foundations who will be asked for a major, planned or deferred gift (a major gift amount differs from organization to organization) within the next 12 -18 months. It should contain approximately 100 names.
- **B List** (optional) – Individuals who will most likely NOT make a major or planned gift, but are INFLUENCERS of others who have the capacity to make a major or planned gift. CPAs, trust officers, financial planners and insurance agents are examples. Children can also be influencers.

- **C List** – Prospects who have the potential to move to the A List but may need additional nurturing or have been determined to be of a lower priority than current A List prospects. The C List can contain 25 – 50 names.

## **Prospect Assignment**

Identification of prospects can be accomplished by first answering a few simple questions: who has donated a significant amount in the past? Who has donated for many consecutive years? Have we run a Top Donor Report out of the database? Who are your most dedicated volunteers?

Assignment of prospects should be done after discussing who has the BEST RELATIONSHIP with the donor or prospect.

## **Using Moves to help set fundraising goals**

It is important to set a specific amount that you plan to ask the probable donor to give. Use their previous giving history and the information that you have gleaned from the natural partners. Then add those numbers up.

For instance, if you are hoping to raise \$250,000 and the total you plan to ask for is only \$100,000 you may have a problem reaching your goal or your budget. You either need to increase the number of asks, ask for more or re-evaluate the goal or the budget. Whatever you do, it must be realistic.

A good rule of thumb is to ask for two times the annual amount you need to raise and three times the amount for deferred gifts. After all, people may not be able to give what you ask for.

## **The Final Steps**

Plot out your twelve month calendar. How many personal contacts can you reasonably accomplish in a month? How many times during the year do you want to visit with your donor? When do you plan to ask?

Ideally these are in person visits, but a phone call can sometimes count. On occasion, a letter or email can provide information but they are a VERY poor substitute for a face-to-face visit.

Plan when you want to visit. And most importantly, what you want to accomplish during the visit. Is it to discuss how their most recent gift made a difference in someone's life? (a Stewardship visit) To introduce the CEO who can talk about the Vision for the next five years? (a Cultivation visit) Or is to actually ask for a specific gift for a specific purpose?

You must know what you want to accomplish. You must plan. Your time and your donor's time have value. Don't waste them. It is important, however, to remember that this plan is on paper not in stone. Situations can change throughout the year. Be flexible and be prepared to adjust the plan.

Remember the old saying – ***Failure to plan is planning to fail.***