MOVES MANAGEMENT
THE SCIENCE OF FUNDRAISING

What is Moves Management?
Moves Management is the process of managing donor relationships. It’s a series of initiatives or moves to develop each prospect's awareness of, knowledge of, interest in, involvement with, and commitment to the institution and its mission. Simply put, Moves Management involves planning, over the course of the year, the desired goal.

What Are Moves?
- Moves represent cultivation opportunities
- A move must penetrate the consciousness of the prospect regarding the organization or giving opportunity. Also, the fund raiser must learn something about the prospect
- Cultivation must be according to a plan and be mission directed

What Are Examples of Moves?
- A behind the scenes tour of your facility
- Invitations to special events
- An “insiders” newsletter
- Invitation to lunch or dinner with CEO and/or program staff
- Invitation to give feedback on strategic plan or case statement

Critical Elements of Moves Management
- Be donor-centered - focus on developing donors, rather than simply securing donations
- Recognize and document the relationships between the organization and it’s supporters
- Focus on strategic thinking to further those relationships--and the support they generate
- Remain flexible, change in response to the organization and the supporters needs
- Support the process with people, practices, and a well-managed Database

Benefits of Moves Management
- Build stronger relationships and raise more money
- Provide meaningful stewardship
- Improve accountability
- Involve more volunteers and nondevelopment staff in the development process
- Strengthen the organization, ensuring sustainability for the future
What Counts as a Move?
- Specifically tailored to the individual (donor-centered)
- Increases engagement
- Increases involvement
- Increases your understanding of the donor
- Advances your strategies and goals
- Leads to solicitation
- Results in a gift

The Role of the Moves Manager
- Develop strategy for each prospect
- Plan contacts or “moves”
- Gather partners who can provide information
- Prepare and coordinate any volunteers
- Execute the plan
- Re-strategize as necessary

Identifying Prospects
- Review current prospects (frequency, recency, upgraded gifts)
- Any “sleeping giants”?
- Engage the Board of Directors and leadership volunteers

Selecting and Engaging Partners
- Share a list of probable prospects, or suspects
- Ask Board of Directors and/or volunteers what they know regarding prospect
- Who among your options is a good natural partner for your prospect
- Who are others you might like to move in and out of the relationship to move the ball forward?

Evaluating Prospects
- Is the person a likely prospect
- What are their interest areas (What might they fund)
- What is their giving capacity
- Net worth, discretionary income, # children, age, prior giving
- What is their present relationship with the organization
- Who are possible partners
- What is a reasonable moves plan? (3 months, 6 months, 1 year, longer?)
Tracking Moves
- This is a critical step that requires discipline and execution
- Create a template for Call Reports including the following information:
  - Date of contact
  - Type of contact (phone, email, visit)
  - Prospect background (personal, relationship with organization)
  - Purpose for the call (what you hope to accomplish)
  - Summary (details of the contact)
  - Next steps (continue, reassign, remove, reask, new move)

Managing Accountability
- Conduct a monthly meeting to assess status (include all people key to the process: moves managers, MGOs, natural partners
- Distribute reports that identify:
  - Prospect name
  - Assigned solicitor/natural partner/moves manager/MGO
  - Status (identify, info gathering, interested, involved, solicited, post-gift stewardship)
  - Date of last contact
  - Nature of last contact
  - Next steps
  - Comments from MGO/moves manager

Keeping Score
- Utilize the information you are inputting in your database to: 1) keep you and your volunteers on track; 2) demonstrate the effectiveness of your moves management strategy--reporting; 3) manage your pipeline
- Create a monthly report that includes:
  - # of prospects in your system
  - number of moves planned
  - # of contacts made
  - # of prospects in each stage of giving cycle (identification, qualification, cultivation, solicitation, stewardship). A good rule of thumb--approximately 20% of your prospects should reside in each stage to maintain a healthy pipeline.
  - $ value of prospects you are moving

Getting Started
- Select 10 to 25 of your best prospects
- Create a file for each prospect
- Collect research (objective sources, Board members/volunteers, info from visits)
- Identify natural partners
- Consult with natural partners
• Devise strategy and gift objective for each prospect
• Plan 5-10 moves
• Implement moves and after each move: Review and record results (call report)
• Refine strategy and adjust next move(s) if necessary
• Review status of each prospect in monthly team meeting

Add and delete prospects as appropriate
• There are four types of prospects:
  o Those ready to make a gift
  o Those needing more time
  o Those needing extensive cultivation
  o Those with little reason to give

Good Moves Management
Keeps constituents moving along the relationship continuum:
  • Identify
  • Qualify
  • Cultivate
  • Solicit
  • Steward
  • Repeat

“Tell me and I’ll forget; Show me and I’ll remember; Involve me and I’ll understand.”
-Confucius

The secret of getting started is getting started.
-Agatha Christie