

## The Science of Fundraising

### Moves Management

#### What is Moves Management?

Moves Management is the process of managing donor relationships. As David Dunlop, the creator of the system described it “The moves concept focuses major gift fund raising on changing people's attitudes so they want to give. To do this, we take 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 strategies you will employ to further a relationship with a donor and to, hopefully, reach 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.
- Asking for a percentage increase over and above someone's last gift, say from \$50 to \$75, and explaining why the increase is justified, is a moves management tactic that can easily be integrated into appeal letters.

#### What Are Examples of Moves?

- A behind the scenes tour of your facility.
- Invitations to special events.
- An “insiders” newsletter, delivered quarterly.
- Invitation to lunch or dinner with CEO and/or program staff.
- Invitation to give feedback on strategic plan or case statement.

#### Cultivation Visits

Cultivation is the bedrock of all major gift fundraising activity. But all too often, fundraisers engage in endless cultivation with little or no planning and with no clear goal in mind. The Moves Management process strives to make cultivation activities focused and goal oriented.

Some things to consider when preparing for cultivation visits:

- What is the best possible outcome, and the minimum acceptable outcome?
- Review key points to be covered during the call.
- List small number of benefits generated by programs/projects which you believe will appeal to the prospect.
- Determine what you will ask the prospect to do, agree to or react to.
- List anticipated questions and your responses.

#### Steps to get started

- Select 10-25 best prospects.
- Gather research on each prospect.
- Identify volunteer/board member and staff for each (this person will be responsible for cultivation and solicitation).

- Consult volunteer/board member/staff about prospect.
- Develop strategy for each prospect with gift amounts and gift opportunities.
- Plan next 5-10 moves.
- Implement moves.
- Review status every quarter months.
- Review at end of year and move new prospects in or old prospects out.

### **Track Your Progress**

It is important to set up a system by which you can track your moves and progress. If you have a database that has a contact tracking component to it, check to see if it contains a pre-programmed Moves Management report. If not, call customer service at the database company and see if they will create one for you. You can also use Outlook or another calendar software. Enter the moves you would like to make throughout the year and set the reminder feature for each move. Finally, you can always use an excel spreadsheet.

### **Moves Manager Job Description**

It helps to have one staff person dedicated the managing the Moves Management process.

Here are sample duties for this staff person.

- Develop strategy for each prospect.
- Track each prospect's relationship with the organization.
- Plan contacts or moves for each prospect.
- Coordinate and prepare volunteers/board members and staff.
- Execute the plan. See that the contacts or moves are made.
- Reconfigure the strategy as things go along and refine the plan accordingly.
- Coordinate the refined plan and execute the newly formulated moves.