

MOVES MANAGEMENT

How to implement Moves
Management for Donor Cultivation

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EDS SHARE V – St. Petersburg, FL



AGENDA

- ▶ Introduction
- ▶ What is Moves Management and how is it used?
- ▶ The Moves Management Cycle
- ▶ Tools to use to implement MM into your development operations
- ▶ Q & A

OUR STORY

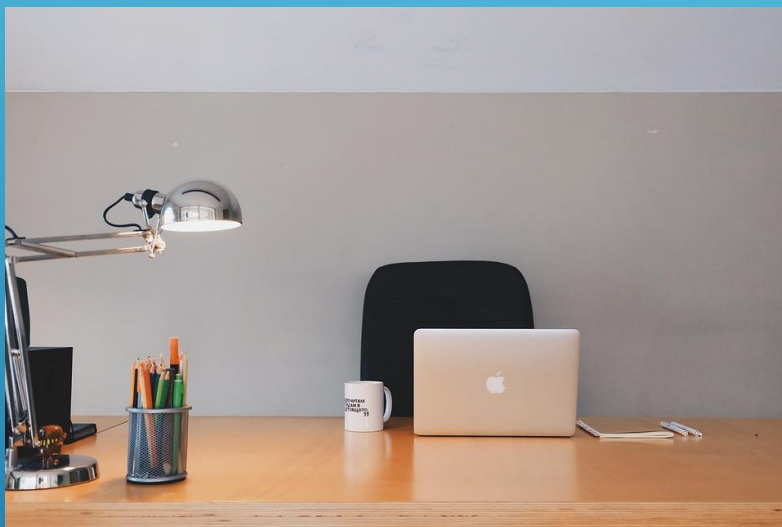
Campaigns, Campaigns, Campaigns

- ▶ Campaign and donation focused
- ▶ Multiple solicitors
- ▶ No concept of asking for money outside of a campaign
- ▶ No real system in place for cultivating our larger donors
- ▶ Disorganization of systems and process
- ▶ The board “oversight”



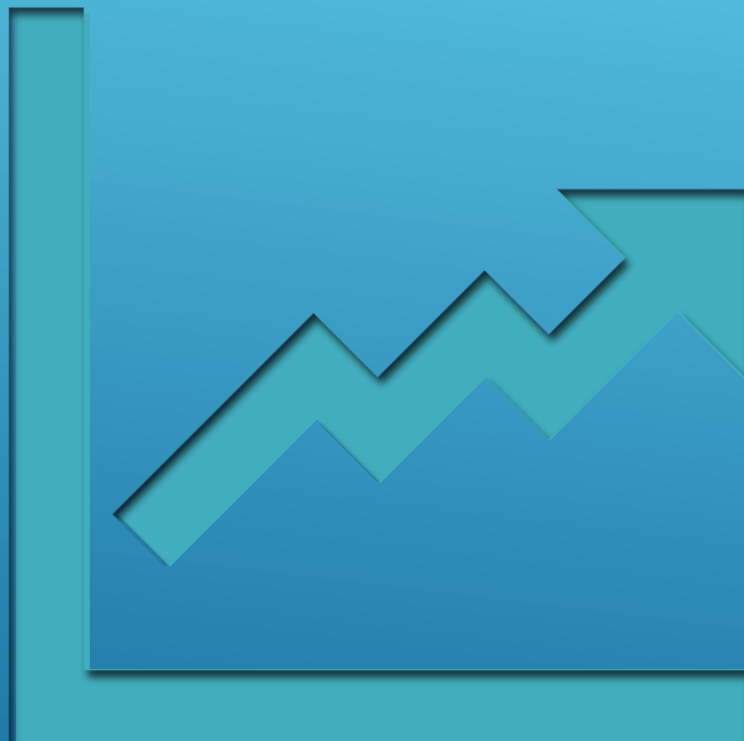
There's gotta be a better way.....

THE BETTER WAY



- We separated our fundraising operations into two parts:
 1. Donor-Focused Relationship Building (Major Donors)
 2. Transactional-based Campaign (Smaller Donors)
- We adopted “Moves Management” to standardize our Major Donor efforts.
- We reassigned office and development roles to separate the two operations.
- We learned much more about our donors.
- We began to use campaigns much more strategically.

THE RESULTS



Over the last 3 years.....

- **46% increase** in overall fundraising
- **52% increase** in the number of major donors
- **29% increase** in overall average gift size

WHAT IS MOVES MANAGEMENT?

Moves Management is Donor Centered Fundraising – Not Campaign Based.

Moves Management is only used for **Major Gifts Fundraising**. Moves Management is NOT used for most donors.

Moves management is a fundraising strategy used to turn a major gift **PROSPECT** into a committed major gift **DONOR**, who continues to maintain and increase his or her gift over time.

Moves Management is the creation and execution of a **deliberate plan** about each major donor within your organization.

MOVES MANAGEMENT IN A NUTSHELL

The key to successful major gifts fundraising is having the right solicitor ask the right donor or prospect for the right amount for the right campaign at the right time.....

.....Using Moves Management helps make sure major gift fundraising is done right!

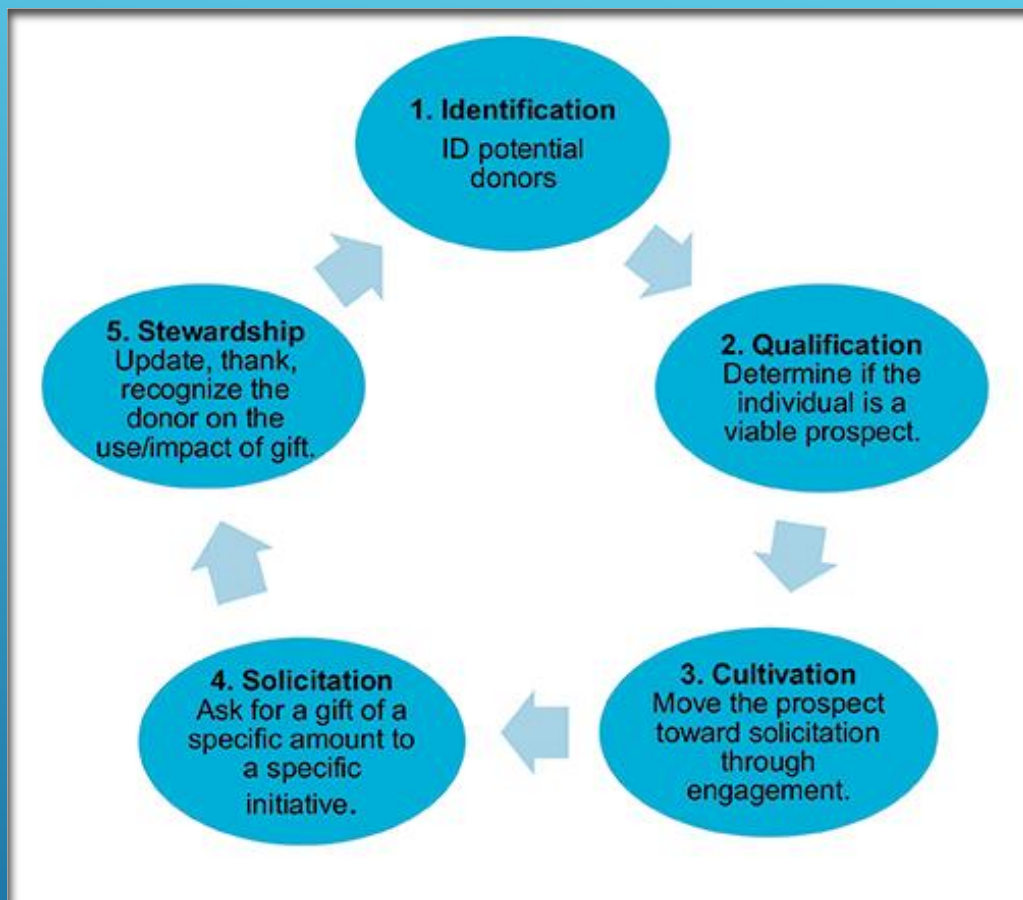
1

Identifying and qualifying the right donors

2

Cultivating, soliciting and stewarding those donors according to a thought-out, deliberate, and documented plan, using "Moves" to methodically go through the process.

TWO MAJOR COMPONENTS TO MOVES MANAGEMENT



1. Identify pool of potential major donors.
2. Qualify them by scoring them.
3. Cultivate them with a plan developed based on their scores.
4. Solicit them!
5. Thank them!
6. Start Over!

THE MOVES MANAGEMENT CYCLE

STEP 1: IDENTIFICATION

Current donors

Parents

Grandparents

Alumni

Community Members

Contacts of Board Members

Etc.

POTENTIAL
PROSPECTS

STEP 2: QUALIFICATION

1. Score Donors
2. Set Goals



THE PERFECT PROSPECT

SCORING PROSPECTS



Qualification Area	Question	Points
Propensity	Is the prospect a current donor?	10
Affinity/Propensity/Capacity	Has the prospect made a recent major Pledge/Donation?	5 - 30
Affinity	Has the prospect donated in prior years (more than 18 months ago)?	5
Affinity/Propensity	Has the prospect donated 5 years in a row?	5
Affinity/Propensity	Has the prospect made any long-term commitments?	5
Capacity	What is the donor's capacity	5 - 20
Affinity	Is the prospect a parent?	5
Affinity	Is the prospect a grandparent?	5
Affinity	Is the prospect an alumnus?	5
Affinity	Is the prospect a board member?	5
HUNCH!	Plus/Minus 5	+/- 5

Recommendation - Use Google Sheets to score.

Most of the scoring can be done with reports from your CRM.

Use wealth screening tools or other methods to determine capacity.

Tally a Total Score for each donor

Sort the scores from top to bottom. Higher scores will get more attention, lower scores will get less.

Calculate the number of possible relationships that can be managed

Drop everyone else from Moves Management. These donors will be assigned as transactional/campaign donors.

Score all donors again the following year.

SCORING PROSPECTS

USE "HUNCH" FIELD TO SLIGHTLY ADJUST
SCORES



ALLOW FOR LIMITED YEARLY
"HUNCH" DONORS AS PART OF
THE PROCESS

"HUNCHES"



- ▶ Set a yearly goal for each prospect
- ▶ Goals
 - ▶ How much \$
 - ▶ When?
 - ▶ For what?
 - ▶ With whom?

GOAL SETTING

Name	ID	Score	Solicitor	\$ Goal	Method	Ask Strategy / What speaks to them?	Solicitation Partner
John Doe	1234	70	RYY	\$10,000	Home Visit	Annual Campaign - Special Ed Programming	Alex W.
Jane Smith	4321	60	RBW	\$5,000	Phone	Scholarships	None



Moves Management

Solicitor
Rabbi Yehuda Zelinger

Solicitor Title
Director of Special Projects

Prospect Total Score
85

Ask Goal
\$15,000.00

Ask Date
5/1/2023

Ask Method
In-Person

Ask Strategy / What speaks to them?
Lamdeinu

Solicitation Partner
shmueley

Lifetime Giving Score
40

Current Donor Score
10

Relationship with TA Score
15

Capacity Score
20

IMPORT SCORES AND GOALS INTO YOUR CRM

Check if your software has a Moves Management module or use custom fields.

STEP 3: CULTIVATION

THE "MOVES"

What are "Moves"?

Moves are **deliberate, planned-out** and **donor-centered** interactions with prospects that:

increase the relationship between the donor and the organization

increase the relationship between donor and the fundraiser

increase your understanding of the donor

advance your strategies and goals for that donor

lead to solicitation

are planned beforehand, and tracked after.

are ideally specifically tailored to the individual

are as personal as possible

EXAMPLES OF "MOVES"

Tour of Facility	Meet for coffee/lunch	Birthday/Anniversary/ Holiday Card	Email Article or video that interests donor	Invite to special event	Ask advice	Mail special copy of Annual Report with a note
Invite to share something with students	Nachas Call	Sending pictures of their kids/grandkids	Sneak preview to an upcoming project or event	Name as host for an event	Personal call thanking the donor for a gift	Recognizing the donor at an event
Publicly thanking the donor for a previous gift	Personalized email	Clipping of article related to recent conversation	Personal call to invite to an upcoming event	Unique experience with organization's beneficiaries	Request to host event at their house	Nomination to Board
Invitation to be on host committee	Ask him/her to speak on behalf of the organization	Meeting with CEO/program staff/Board Chair	Invitations to private or special events	Follow up phone call from an recent event	Personal appreciation of the prospect/donors' time and money	Conversation about friends or colleagues whom they think could help support the organization

HOW MANY MOVES?

- ▶ Ranked by Donor Score
 - ▶ Higher the score, better moves needed
 - ▶ In person, more personal
 - ▶ Higher the score, the more moves needed
 - ▶ 4 moves/year for lower scores
 - ▶ 6 moves/year for mid-range scores
 - ▶ 8-12 moves/year for highest scores

Recommendation – Use Google Spreadsheet

Chart out as much as you can in advance, with as much detail as possible

Adjust slightly along the way if necessary

MOVES MUST BE
PREPLANNED!

THE SPREADSHEET

Name	ID	Score	Solicitor	\$ Goal	Method	Ask Strategy / What speaks to them?	Solicitation Partner	August	September	October	November	December	January	February	March	April	May	June	July
John Doe	1234	70	RYY	\$10,000	Home Visit	Annual Campaign - Special Ed Programming	Alex W.		Rosh Hashana Card		Coffee	Personal send of chanukah video	Sneak preview of next project	Donor event	Shaloch Manos	Invite to read story to PS Kids	Solicitation	Personal Thank you	
Jane Smith	4321	60	RBW	\$5,000	Phone	Scholarships	None		Rosh Hashana Card		Nominate for committee	Personal send of chanukah video		Donor event	Shaloch Manos			Solicitation	Personal Thank you


August	September	October	November	December	January	February	March	April	May	June	July
	Rosh Hashana Card		Coffee	Personal send of chanukah video	Sneak preview of next project	Donor event	Shaloch Manos	Invite to read story to PS Kids	Solicitation	Personal Thank you	
	Rosh Hashana Card		Nominate for committee	Personal send of chanukah video		Donor event	Shaloch Manos			Solicitation	Personal Thank you



Task Details

Constituent
Ira Geller
 ira@gellerlighting.com

Attachments
 Select a file to upload or link to a website.

Due Date *
 11/30/2022 

Subject *
 Chanukah candles

Assign to *
 Yehuda Zelinger

Purpose *
 Impact/Cultivation

Channel *
 Mail

Notes
 Impact/Cultivation

TURN MOVES INTO TASKS IN YOUR CRM

Date	Channel	Purpose	Subject	Note
8/27/2021	Mail	Impact/Cultivation	Rosh Hashana Card	Rosh Hashana Card
10/31/2021	Email	Impact/Cultivation	October Moves Email	
12/1/2021	In Person	Impact/Cultivation	bring tefilin pic	brought pic over and he loved it
12/7/2021	In Person	Impact/Cultivation	lunch by david chu's	had lunch with aaron and dr zaremski (2 stem donors)
3/18/2022	In Person	Impact/Cultivation	Large Mishloach Manos	
4/30/2022	Phone	Impact/Cultivation	Donor event invite	
5/10/2022	Email		Train talk	
7/19/2022	In Person	Solicitation	he finished old building pledge	ask for new one. bring along board member
8/31/2022	Email	Impact/Cultivation	end of year thank you email	
9/30/2022	Mail	Impact/Cultivation	RH card	

REPORTING AND OVERSIGHT

STEP 4: SOLICITATION

STEP 5: STEWARDSHIP

STEWARDSHIP

Some of the MOST
IMPORTANT
MOVES!! Work this
into your plan!!

Think of as many
ways that you can
to shower the donor
with love and
Kavod.

Well done
stewardship is the
best form of
cultivation possible
for the next gift.

Think personal, and
out-of-the-box

STEP 6: START OVER!

 Score everyone again! Begin with last year's data from your CRM.

 New prospects are added, some prospects drop off.

 DO NOT FIGHT THIS PROCESS!!!

 Sort Scores, Set new goals, import new data in CRM, plan moves.....

 Proceed to cultivation.....

START OVER!

Prospect Scoring – Run reports from CRM, score in Google Spreadsheet

Moves Planning – Google Spreadsheet. A whole year of moves can be seen as a snapshot.

Automation software (Zapier) pushes monthly planned moves into CRM as a task.

Development team completes the moves and records the completed task as an interaction.

THE TOOLS



QUESTIONS