Moves Management: All the Right Moves Towards Major Gifts

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Crescendo Practical Planned Giving Conference

The Importance of being Donor Focused

As fundraisers, we need to cultivate and solicit donors in a way that appeals to their needs. Our best strategies will involve activities that are meaningful and impactful in a donor centered approach using moves management.

The Essence of Moves Management

The process involves managing a series of steps (moves) with identified prospects that each is moved from attention to interest to desire to action and then back to interest until he or she has given everything they will or can to your organization.

William T. Sturtevant  
The Artful Journey
Use Data to Manage for Results

Just looking at month end results is retrospective...

It's like driving a car by only looking in the rearview mirror.

Moves management is planning

- Most moves represent "mission-directed" cultivation steps.
- “To be effective a move must penetrate the consciousness of a prospect regarding the organization or a giving opportunity.” Sturtevant
- By planning our moves, we can organize our major giving development activities and effect results.

Understanding Your Donors

- Seven Faces of Philanthropy – Prince & File, 1992
- True Colors – Don Lowry, 1978
- Generational Cohorts
  - Traditionalists (Born Pre-1946)
  - New Philanthropists (Born 1946-Present)
### Generation Names and Birth Years

<table>
<thead>
<tr>
<th>Generation Name</th>
<th>Birth Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Depression</td>
<td>1912-1921</td>
</tr>
<tr>
<td>World War II</td>
<td>1922-1927</td>
</tr>
<tr>
<td>Post-War</td>
<td>1928-1945</td>
</tr>
<tr>
<td>Leading Boomers</td>
<td>1946-1954</td>
</tr>
<tr>
<td>Younger Boomers</td>
<td>1955-1964</td>
</tr>
<tr>
<td>Generation X</td>
<td>1965-1976</td>
</tr>
<tr>
<td>Millennials</td>
<td>1977-1984?</td>
</tr>
<tr>
<td>Great Recession</td>
<td>1985-?</td>
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</table>

### New Philanthropists

**Do not trust charities**

Will not make gifts unless they can see:

- Impact
- Long-term outcomes
- Verifiability
- Accountability
- Real volunteer opportunities
- “Get out of the way”

### To Develop Relationships with New Philanthropists

Use Donor-Centered Philanthropic Planning

- Mission of the charity
- Long-term goals of the donor/family
- Relationship with the charity, not your needs
- Impact and outcomes (robust stewardship)
- Allow more restricted gifts
- Partnerships with professional advisors
Value of Engagement

- Tarnside Curve of Involvement – developed by Patrick Boggen.
- Communicating Mission, Vision and Values and involving individuals in your work can lead to a greater engagement of donors to an organization.

Grow Engagement through Involvement

Develop a stronger relationship with your donor
- Awareness
- Interest
- Engagement
- Commitment
- Ownership
- Taking Personal Responsibility

Moves management is:
- Highly personalized
- Focuses on the top 10%
- Involvement is the key
- Includes natural partners
Moves Management

Each prospects needs:
- Natural partners
- Primary player
- Moves manager

Duties of the Moves Manager:
- Develop strategy for each prospect
- Track relationship with the organization
- Plan contacts or moves
- Coordinate and prepare natural partners and primary players
- Execute the plan
- Refine the strategy as needed
- Coordinate the refined plan and execute the newly formulated moves
- Document in contact reports, donor record, etc.

What are moves?
- Represent “mission-directed” cultivational steps
- Learn something about the prospect and possible giving opportunities
- Makes the move effective
- Number of moves (1 per month or 12 per year)
Major Gift Data Structures

Prospects
- Classification
- Status

Development Officer’s Actions with Prospects
- Category (How)
- Type (What)

Focus on Prospects

Prospects’ Path to Giving
Utilizing Systems

<table>
<thead>
<tr>
<th>Classification</th>
<th>Status</th>
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<tbody>
<tr>
<td>Planned Gifts</td>
<td>Identified</td>
</tr>
<tr>
<td>Major Gifts</td>
<td>Discovery</td>
</tr>
<tr>
<td>Leadership Annual Gvg</td>
<td>Research</td>
</tr>
<tr>
<td>Annual Giving</td>
<td>Early Cultivation</td>
</tr>
<tr>
<td></td>
<td>Late Cultivation</td>
</tr>
<tr>
<td></td>
<td>Solicitation/Negotiation</td>
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<tr>
<td></td>
<td>Stewardship …</td>
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</tbody>
</table>

Prospect Classification and Status provide important data

Development Officer Actions

<table>
<thead>
<tr>
<th>Action Category (How)</th>
<th>Action Type (What)</th>
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</thead>
<tbody>
<tr>
<td>Meeting (Face to Face)</td>
<td>Foreground Moves</td>
</tr>
<tr>
<td>Phone</td>
<td>• Cultivation Activity</td>
</tr>
<tr>
<td>Email</td>
<td>• Ask/Proposal</td>
</tr>
<tr>
<td>Mail</td>
<td>• Follow-up</td>
</tr>
<tr>
<td>Task/Other</td>
<td>Background Moves</td>
</tr>
<tr>
<td></td>
<td>• Invitation</td>
</tr>
<tr>
<td></td>
<td>• Follow-up</td>
</tr>
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<td></td>
<td>• Birthday</td>
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Using Data to Manage for Results

<table>
<thead>
<tr>
<th>Officer</th>
<th>Face to Face Visits</th>
<th>Phone Calls</th>
<th>Emails</th>
<th>Letters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adrian</td>
<td>18</td>
<td>29</td>
<td>75</td>
<td>8</td>
</tr>
<tr>
<td>Bobby</td>
<td>17</td>
<td>65</td>
<td>29</td>
<td>23</td>
</tr>
<tr>
<td>Sally</td>
<td>20</td>
<td>32</td>
<td>88</td>
<td>6</td>
</tr>
<tr>
<td>Joe</td>
<td>12</td>
<td>6</td>
<td>13</td>
<td>5</td>
</tr>
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Avoid Cultivation Traps:

- Cultivational objectives that are too general
- Cultivational objectives that are unrealistic
- Cultivational objectives that are fundraiser driven
Prior to Each Move:

- Determine the best possible outcome and the minimum acceptable outcome
- Review key points to be covered during the cultivation call
- List a small number of benefits of the program/project which you believe appeal to the prospect
- Determine what you want as the next steps
- List anticipated questions and responses

Two Types of Cultivational Moves:

**Foreground initiatives** – planned contacts with a specific prospect

**Background initiatives** – group activities that may include one or more of your prospects

Checklist:

- Select 10 – 25 of your best prospects
- Create a file on each and collect easy-to-access research
- Identify natural partners
- Consult (confidentially) with your natural partner
- Select a primary player
- Develop a strategy for each prospect with a gift objective for both an amount and an opportunity
Checklist (cont’d):

- Plan your next 5 – 10 moves
- At the beginning or the end of the year review the status of each prospect, refine your strategy, objectives and plan the next 5 – 10 moves
- At the end or beginning of the year, add and delete prospects as appropriate

<table>
<thead>
<tr>
<th>Moves Management</th>
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<tbody>
<tr>
<td>• Planning is the key to success.</td>
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<tr>
<td>• Set time to consider moves for each prospect that you are managing.</td>
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<tr>
<td>• Form a Moves Management Strategy for each prospect that puts the donor in the right situation to learn more about the Mission, Vision and Values of your organization.</td>
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PRACTICAL PLANNED GIVING CONFERENCE
SPEAKER EVALUATION

Date: ___________________  Speaker: ______________________________

Name (optional): __________________________________________________

Please rate the following:

<table>
<thead>
<tr>
<th></th>
<th>Excellent</th>
<th>Good</th>
<th>Neutral</th>
<th>Fair</th>
<th>Poor</th>
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<tbody>
<tr>
<td>I. OVERALL</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Were your major objectives for this session met? Was the content of the session vital, timely, substantive?</td>
<td></td>
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<tr>
<td>Comments:</td>
<td>__________________________________________________________</td>
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| II. RELEVANCE | 5 | 4 | 3 | 2 | 1 |
| Was the subject matter directly related to the requirements of your job? |
| Comments: |__________________________________________________________|

| III. VALUE | 5 | 4 | 3 | 2 | 1 |
| Do you believe the benefits of this session were worth the time, effort and cost? |
| Comments: |__________________________________________________________|

| IV. SPEAKER | 5 | 4 | 3 | 2 | 1 |
| How was their presentation style? Did the session move along at the right pace? Did they have appropriate knowledge on the topic? |
| Comments: |__________________________________________________________|

| V. MATERIALS | 5 | 4 | 3 | 2 | 1 |
| Were the materials clear and organized and appropriately helpful for the session? |
| Comments: |__________________________________________________________|

Vi. What did you like the most about the session?

__________________________________________________________

VI. Any suggestions to improve future sessions?

____________________________________________________________________________________

XII. How many years of gift planning experience do you have? _____