Increase Your Gifts with Moves Management

Ask the right questions to increase fundraising success.

BY RON MIRENDA

Successful gift solicitation comes down to "five Rs":

- Is the **Right Person** asking
- the **Right Prospect** for
- the **Right Gift** amount for
- the **Right Project** at
- the **Right Time**?

If these 5 Rs are part of your solicitation, you'll be successful most of the time. How do you ensure this happens? One of the best ways is with moves management.

How Moves Management Works

Let's assume you have a group of prospects for which you've identified the five Rs. In addition, you need the following tools:

A Fundraising Database Management System. This system can be as sophisticated as Blackbaud's Raiser's Edge or as simple as an Excel spreadsheet. As long as you can sort, update, and track data by a number of categories, you can create a moves management system that will work for you. If you're using an Excel spreadsheet, track only prospects who are ready to be solicited within the next three to six months. It's a good idea to track prospects on a 90-day cycle. If you haven't "moved" them within 90 days, you need to take them off your radar screen.

A Contact Report Form. This document is the key to managing moves with prospects. If you don't know what's happened and what's supposed to happen, by when, with each prospect, you can't move them effectively from one level of activity to another. (See sample contact report form.) On the form, include the following elements:

XYZ ORGANIZATION
CAPITAL CAMPAIGN
CONTACT REPORT FORM

NAME OF PROSPECT: ______________________________

DATE OF CONTACT: ______________________________

METHOD OF CONTACT: (in person, telephone, etc)______________

OTHERS INVOLVED: ______________________________

SUMMARY OF CONTACT: (key points)

SUGGESTED FOLLOW-UP/ACTION/NEXT STEPS: include person(s) responsible and due dates. Please be specific.

VOLUNTEER'S NAME: ______________________________
(please print)

PLEASE RETURN TO: Director of Development
XYZ Organization
P.O. Box 123
Denver, CO 80209

NOTES: Handwritten notes are perfectly acceptable to expedite reporting

If you haven't "moved" prospects within 90 days, you need to take them off your radar screen.

- **What** happened when you contacted the prospect?
- **What** is the next step with the prospect?
- **Who** is supposed to do it?
- And, most important of all, by **when**?

The most often-asked question is, "What do we report on?" The answer is, quite simply, any action that "moves" the prospect toward solicitation. That could include a phone call, a letter, or a meeting, whether planned or incidental. It doesn't include bumping into the prospect and saying, "We must get together to talk about the symphony." It does include inviting the prospect to lunch to meet the new executive director and discuss your organization's long-range plan.

The contact report, being the most important element of the system, is the most difficult to achieve. The most well intentioned human beings, whether development officers, CEOs, or volunteers, seem to have a natural aversion to documenting their fundraising activities. Someone, usually the development officer, has to be creative in getting this information.

Whoever is fulfilling this management function should provide the volunteers with an electronic version of the contact report so all they have to do is e-mail or fax it. The volunteers may need debriefing by phone or in person. The development officer should do whatever is necessary to get the critical information regarding what happens next with the prospect and when it's supposed to happen. Of course, the development professional must set the example and always file contact reports as soon as possible after an action with a prospect.

A Moves Management Report. This document is a report of all prospects who require an action to move toward solicitation. Set up the report so you can sort by prospect, rating, volunteer, staff person, last action, and date, to give an overview of what has and hasn't happened during the last activity period. This report will also act as a tickler to remind staff who needs to do what by when. You can download the report from your database management system. After a successful solicitation, the moves management system will then guide you through the stewardship process and possible future solicitation of the prospect in the next campaign.

Prospect Management Meetings. Staff and key volunteers meet regularly to monitor progress and initiate next steps. Staff might meet bi-weekly and get together with volunteers monthly. Such meetings give staff members a chance to talk to volunteers, arrange for them to call or visit prospects, and keep track of their progress.

Prospect Manager. This person reports to the chief development officer or campaign director and monitors the moves management process. The prospect manager will need to do the following:

- **Make sure** contact forms are filed.
- **Enter** information from contact forms into the moves management report.
- **Schedule** the prospect management meetings.
- **Lead** these meetings.
- **Have a good sense** of where a solicitation is in the development cycle, ensuring that people follow through with their responsibilities to make the system work.

Put It All Together

You now have the components of a dynamic, effective system to lead prospects to make that gift to your campaign. It's up to the development professional to see that it works. It will come as no surprise to anyone involved in fundraising that the professional may have to guide, direct, cajole, and even bribe staff and volunteers to get the system to work. It is, however, worth the effort. If you have correctly identified, screened, and rated your major prospect pool, the moves management system will maximize your gift potential and guide you to your goal. ■

Resources

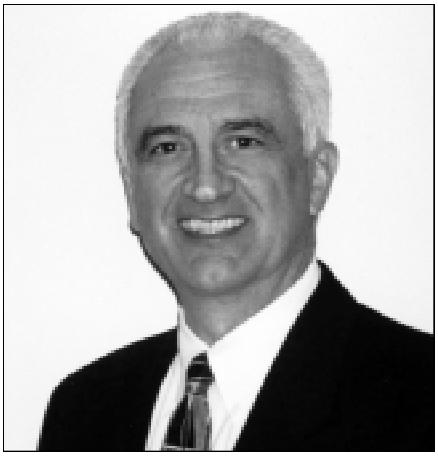
Costello, Tim & Bryan Lilly, "Improve Your Donor Base," *Nonprofit World*, Vol. 19, No. 6.

Edwards, Paul & Ernest Wood, "The Inner-Game Attitude of Major Gift Solicitation," *Nonprofit World*, Vol. 10, No. 2.

Muehrcke, Jill, ed., *Fundraising and Resource Development, Leadership Series.*

Reuther, Valerie, "Debunking the Myth of Bill Gates: Finding Major Donors," *Nonprofit World*, Vol. 16, No. 2.

These resources are available from the Society's Resource Center, www.snpo.org.



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