



Moves Management Demystified

Smart and effective nonprofit organizations that are well run have disciplined and consistent operating systems for Moves Management. Clients often ask what exactly is “Moves Management”? A simple definition of Moves Management is a proven method of coordinating relationship building activities that result in the improvement of bottom line results.

A successful Moves Management program will increase the success rate of every solicitor action, communication, and appeal and can help your organization provide excellence in terms of responsiveness to donors, internal efficiency, and bottom-line results. While the scale and scope of Moves Management operations widely vary, from institutions of higher education with a team of 20 Major Gifts Officers and numerous regional offices to a small regional nonprofit organization with a staff of three, here are some suggested key elements to an effective program:

Program and pipeline management: Like every nonprofit, your organization wants to have acquaintances or prospects transform into lifelong friends or sustainable donors. Do you have a formal process for managing the identification, qualification, cultivation, and solicitation of top supporters? How do you identify your best prospects and ensure they are being engaged appropriately?

There are a range of resources available for this work from hiring development research professionals, purchasing database overlay tools, internet sites and directories, etc. I still believe the most effective way to learn about folks is to meet them or talk to them on the phone and be authentically curious and incredibly observant and intuitive. The smallest office can make an agreement to ‘meet’ one donor a week and ask them five open ended questions about themselves and their relationship with the organization.

Information management: If you don't already do so, start with a single system of record for tracking and managing contacts and activities with donors. This is termed as a constituent relationship management (CRM) system and helps coordinate activities between different departments and solicitors within your organization and can provide the platform you need to collect, analyze, and report on results.

When I started at the Women’s Sports Foundation almost two decades ago and we had a staff of two of us in the membership department, we had an index box with the 12 months labeled and each donor who gave \$250 or more having a card where we noted the activity we engaged in. Once done, the card was moved to either the next quarter or year depending on next engagement. All of this is now possible with off-the-shelf, reasonably priced CRM software like [e-tapestry](#), [giftworks](#) or [salesforce](#).

www.ImaginePhilanthropy.com

tuti@imaginephilanthropy.com

516.380.0923



Strategic analysis: Evaluating your programs with specific, quantifiable goals and success criteria helps to measure progress and identify opportunities for improvement. This information is critical to making smart decisions about your future fundraising strategies and improving results over time. Taking the time to gather information, both informally from donors themselves and formally through data analysis is critical. Use every new program, new draft of a strategic plan, a draft of an annual report to send to a host of donors for inquiry and share throughout the organization what you learn. Think of it like a summary of several focus groups, something most for profit companies do in some form.

Consistent meetings: In order for it to be effective, time must be set aside by key staff to discuss the top tier of supporters. Bi-monthly meetings with the leadership and development staff where there is a systemized review of the results of recent meetings, engagement opportunities, schedules, and communication efforts is critical for focused and strategic attention to relationship building. The time taken to discuss the feedback received from meetings and conversations with supporters is a magical opportunity for reflection, inspiration, and innovation.

Every organization is different, and the process and activities you employ to educate and engage supporters and bring them closer and closer to being a lifelong partner and contributor must be aligned with your specific goals, objectives, and mission.

If you or your team want to design a comprehensive relationship building Moves Management system, let us know as we enjoy the left brain/right brain work of this work!

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