

# Moves Management

Retaining and Upgrading Your Donors

*Presented by*



## Warm Up

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**Directions:** Think of one current donor who you think could be giving more. Fill in the information in the table below.

<b>Donor name/pseudonym:</b>
<b>Average annual giving:</b>
<b>How much you think they could be giving:</b>
<b>Why you think they could be giving more (i.e. any evidence you have):</b>

## Objectives and Agenda

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### Objectives

By the end of this session, you will be able to...

1. Identify a major gifts prospect using the major gifts prospect chart.
2. Identify where a prospect is within the major gifts cycle.
3. Create a moves management plan using a moves management plan template.

### Agenda

- Introduction and warm up
- Define fundraising
- Define individual giving
- Qualify major gifts prospects
- Major gifts cycle
- Moves management plan
- Conclusion

## Fundraising and Major Gifts

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### Setting a Major Gift Threshold

**Directions:** What is the minimum dollar amount for a donation to qualify as a major gift for your organization? Think about it and write down the amount in the space below.

*Guideline:* Take your average annual fund gift and multiply it by 10.

**Major gift minimum dollar amount:**

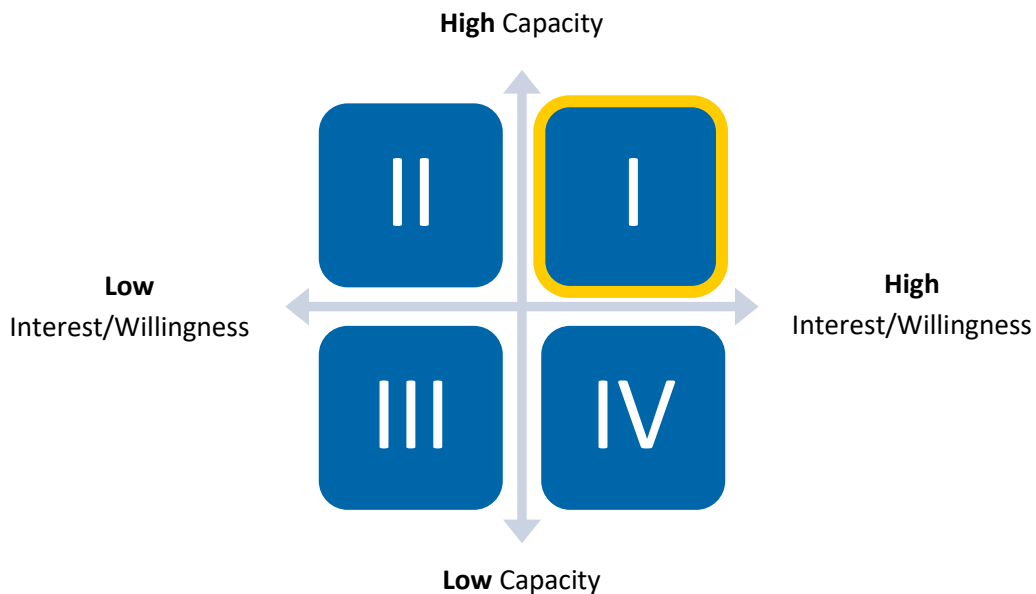
### Qualify Three Major Gift Prospects

**Directions:** Think of 3 prospects that are currently giving small annual fund gifts to your org that could give a major gift (i.e. are in quadrant 1). Write down their names in the space below.

**Prospect #1 name/pseudonym:**

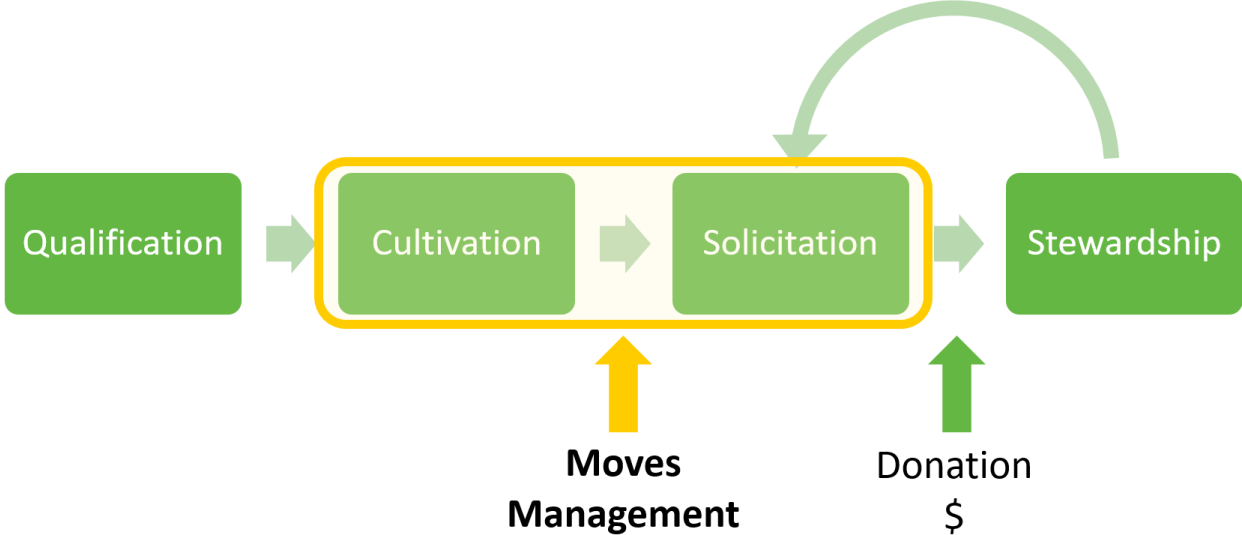
**Prospect #2 name/pseudonym:**

**Prospect #3 name/pseudonym:**



# Major Gifts Cycle

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## Moves Management Plan

### Moves Management Plan Example

Name	Ask Amount	Q1	Q2	Q3	Q4
Allen, Thomas	\$100,000	1. Phone call to share info and invite for site visit. 2. Give personal tour.	1. Invite to President's Dinner 2. Introduce to President	1. Invite to lunch with Board member. 2. Solicit for \$100K. 3. President calls to thank Thomas.	1. President acknowledges gift in end of year newsletter.
Brown, Shanna	\$50,000	1. President calls to invite for dinner. 2. President asks Shanna to host an intimate dinner with her high capacity friends.	1. Invite to President's Dinner 2. President publicly thanks Shanna at the President's Dinner.	1. President solicits Shanna for \$50,000.	1. President acknowledges gift in end of year newsletter.
Conway, Albert	\$25,000	1. Phone to ask about family foundation, share information about org, and invite for a site visit. 2. Conduct site visit.	1. Invite to President's Dinner 2. Introduce to President	1. Apply to family foundation. 2. Ask Albert to champion the application to his family foundation.	1. President acknowledges gift in end of year newsletter.
Davis, Robert	\$10,000	1. Phone to share more information and invite for a site visit. 2. Give personal tour.	1. Ask to volunteer as a greeter for the President's Dinner.	1. President calls to thank for volunteer work. 2. Ask to volunteer involving programming.	1. Solicit at end of year for \$10,000.
English, Alice	\$250,000	1. President phones to invite to private dinner. 2. Dinner with president.	1. Invite to President's Dinner 2. President engages her.	1. President invites to join the Board of Directors. 2. President solicits for \$250,000.	1. President acknowledges gift in end of year newsletter. 2. Onboarding to make Alice a spokesperson for the organization.
<b>Total</b>	<b>\$435,000</b>				

## List of Potential Moves

**Directions:** Review the list of potential moves below. Add any additional moves that are relevant to your organization or donor prospects to the bottom of the list.

- A personal, behind the scenes tour of your facility.
- Personal phone calls to share information about the organization.
- Personalized birthday cards.
- Invitations to special events.
- Featured or mentioned in organization's newsletter.
- Invitation to lunch or dinner with CEO/President/Board/staff.
- Invitation to give feedback on strategic plan.
- Asking the prospect to host an intimate event for potential donors.
- Publicly thanking donor at event.

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## Moves Management Plan Template

Name	Ask Amount	Q1	Q2	Q3	Q4
<b>Total</b>	\$				

## Thank You!

Thank you for participating in today's session! All session materials are available for free at [www.AdvanceLLC.net](http://www.AdvanceLLC.net) on the "Resources" page.

Please email us at [info@advancelc.net](mailto:info@advancelc.net) with any questions or for more information. We would love to hear from you!