

# Moves Management

Retaining and Upgrading Your Donors

*Presented by*



# Activity

## Warm Up

# Directions

Write the following info on page 1 of your handout.

1. A donor who you think could be giving more.
2. How much on average they give annually.
3. How much you think they **could be** giving.
4. Why you think they could give more? What evidence do you have?

# Objectives

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

**Objective 1:** Identify a major gifts prospect using the major gifts prospect chart.

# What is fundraising?

## Fundraising (*noun*)

The raising of assets and resources from various sources for the support of an organization or a specific project.

# Funding Sources

Corporations

Foundations

Bequests

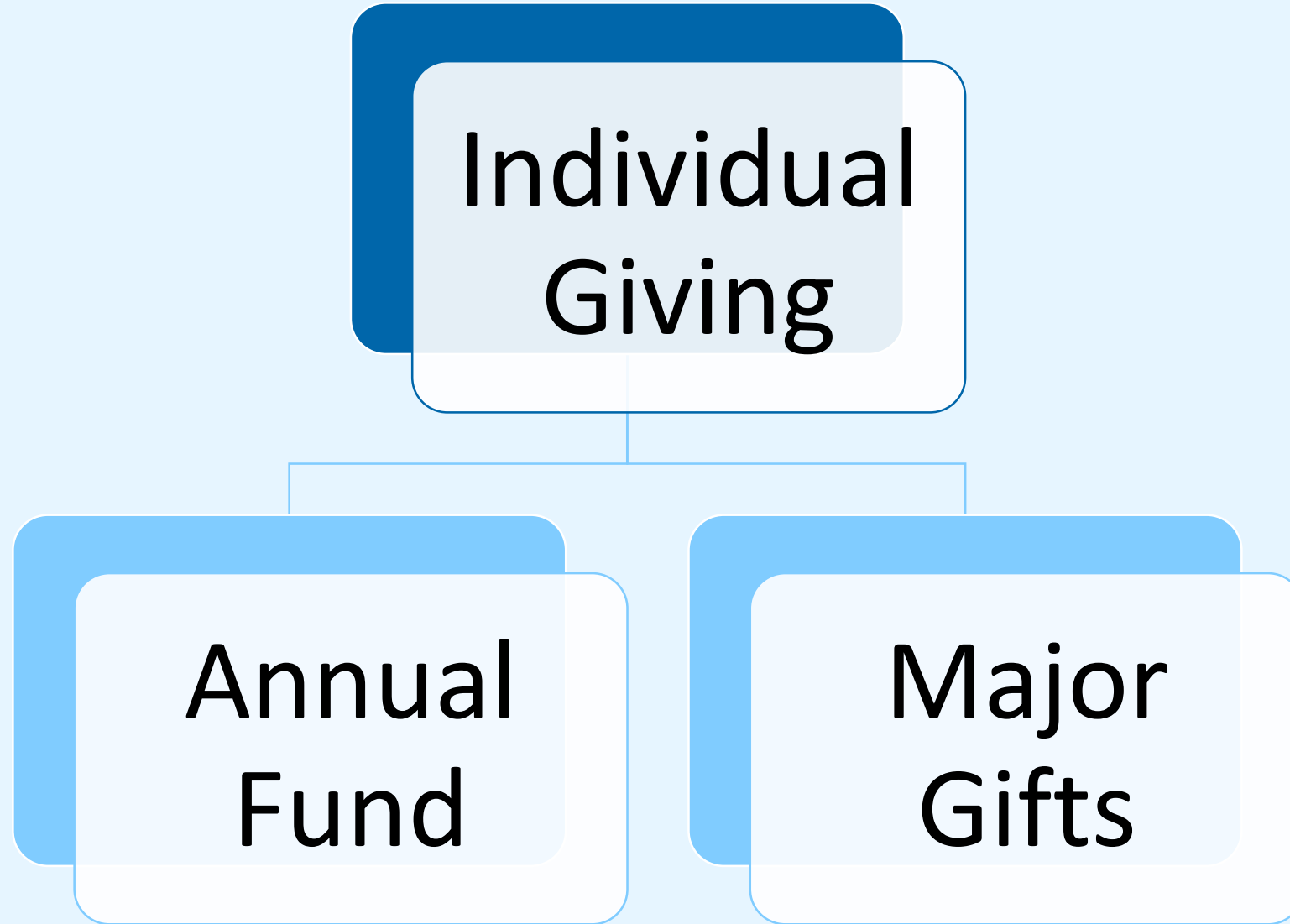
Federal and  
state grant  
opportunities

**Individuals**

Fees for  
service

Interest from  
investments

Loans





## Annual Fund (*noun*)

The total gifts made on a yearly basis to support yearly budgets or general operations.

## Major Gift (*noun*)

A major gift is a significant donation to a not-for-profit organization, the amount required to qualify as a major gift being determined by the organization.

## Activity

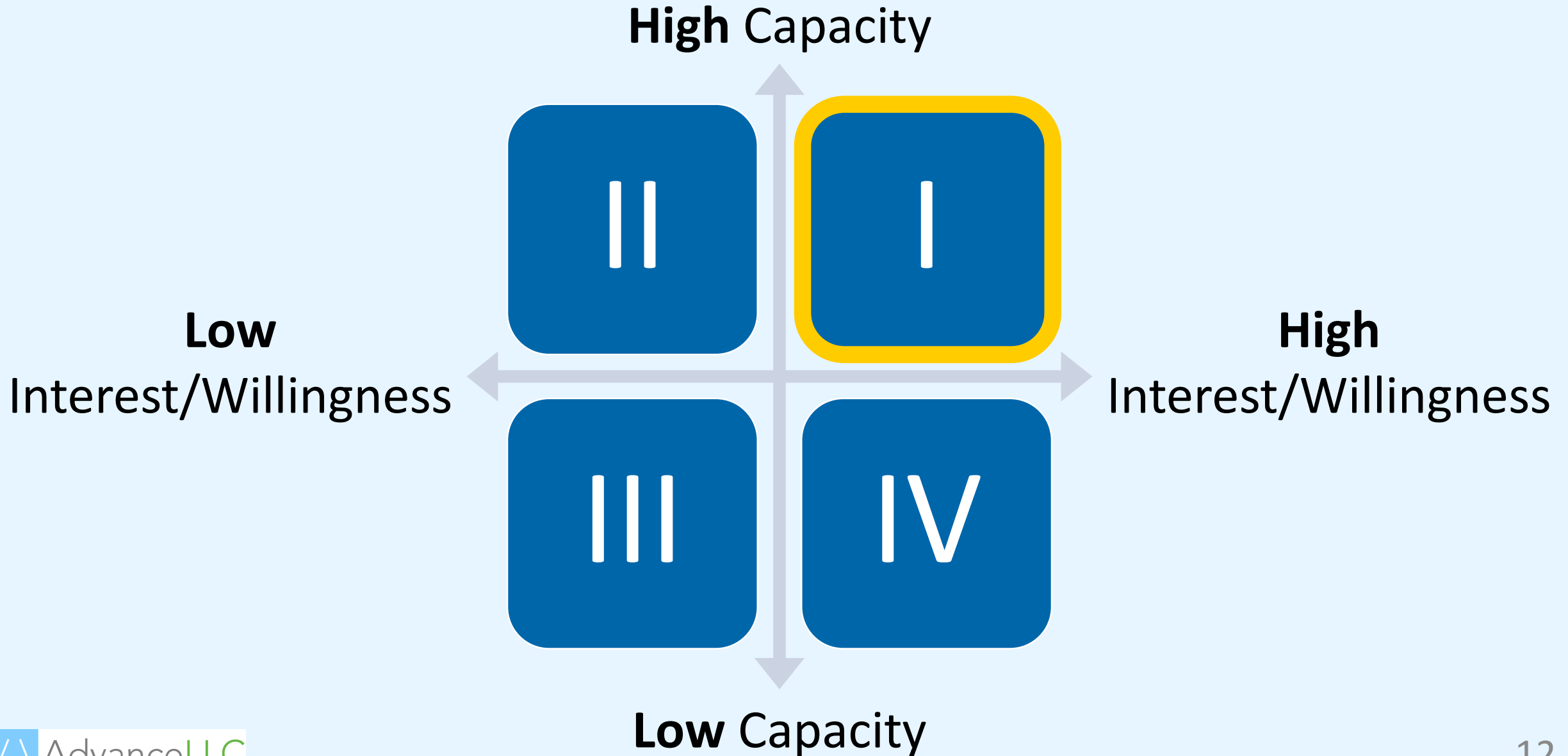
### Setting a Major Gift Threshold

## 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 on page 2 of your handout.

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

# Qualifying a Major Gift Prospect

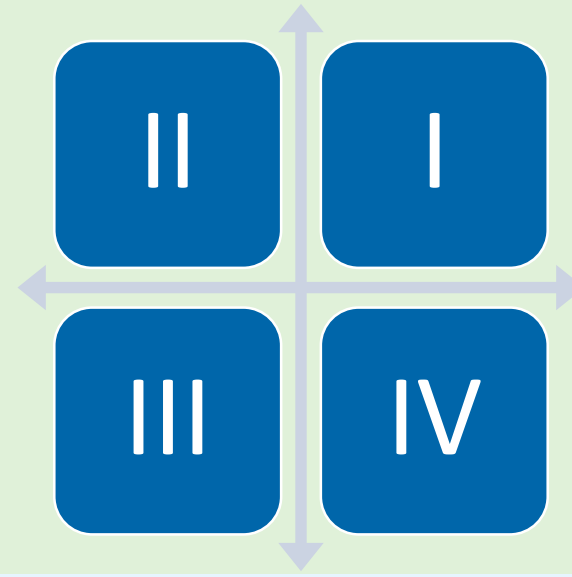


## Activity

### Qualify 3 Major Gift Prospects

## Directions

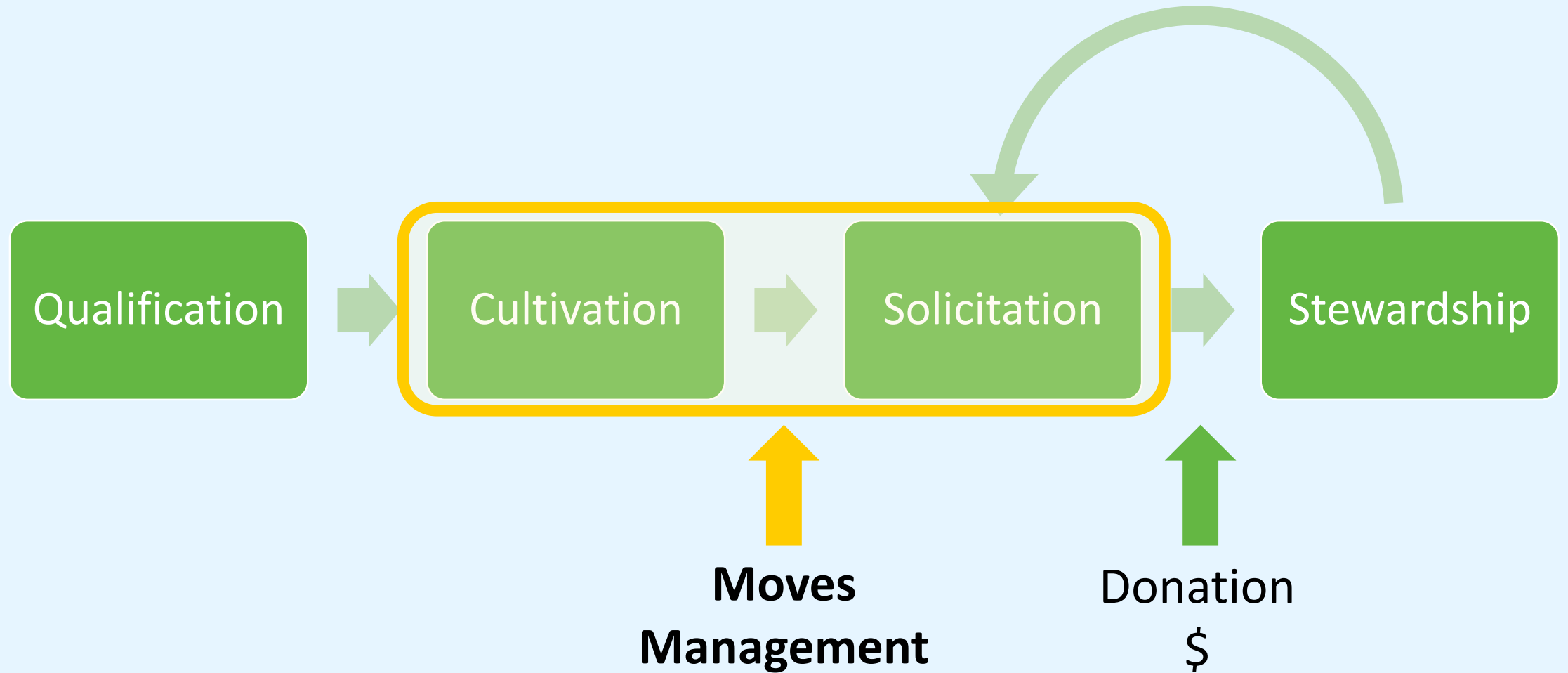
Think of 3 prospects that are currently giving small annual fund gifts to your org that could give a major gift (i.e. are in quadrant 1). Write down their names on page 2 of your handout.



# Major Gifts Cycle

**Objective 2:** Identify where a prospect is within the major gifts cycle.

# Major Gifts Cycle



# Moves Management Plan

**Objective 3:** Create a moves management plan using a moves management plan template.



## Moves Management (*noun*)

Moves management is a fundraising strategy used to turn a major gift prospect into a committed major gift donor.

# Moves Management Plan Example

Name	Ask Amount	Q1	Q2	Q3	Q4
<b>Allen, Thomas</b>	\$100,000	<ol style="list-style-type: none"> <li>1. Phone call to share info and invite for site visit.</li> <li>2. Give personal tour.</li> </ol>	<ol style="list-style-type: none"> <li>1. Invite to President's Dinner</li> <li>2. Introduce to President</li> </ol>	<ol style="list-style-type: none"> <li>1. Invite to lunch with Board member.</li> <li>2. Solicit for \$100K.</li> <li>3. President calls to thank Thomas.</li> </ol>	<ol style="list-style-type: none"> <li>1. President acknowledges gift in end of year newsletter.</li> </ol>
<b>Brown, Shanna</b>	\$50,000	<ol style="list-style-type: none"> <li>1. President calls to invite for dinner.</li> <li>2. President asks Shanna to host an intimate dinner with her high capacity friends.</li> </ol>	<ol style="list-style-type: none"> <li>1. Invite to President's Dinner</li> <li>2. President publicly thanks Shanna at the President's Dinner.</li> </ol>	<ol style="list-style-type: none"> <li>1. President solicits Shanna for \$50,000.</li> </ol>	<ol style="list-style-type: none"> <li>1. President acknowledges gift in end of year newsletter.</li> </ol>
<b>Conway, Albert</b>	\$25,000	<ol style="list-style-type: none"> <li>1. Phone to ask about family foundation, share information about org, and invite for a site visit.</li> <li>2. Conduct site visit.</li> </ol>	<ol style="list-style-type: none"> <li>1. Invite to President's Dinner</li> <li>2. Introduce to President</li> </ol>	<ol style="list-style-type: none"> <li>1. Apply to family foundation.</li> <li>2. Ask Albert to champion the application to his family foundation.</li> </ol>	<ol style="list-style-type: none"> <li>1. President acknowledges gift in end of year newsletter.</li> </ol>
<b>Davis, Robert</b>	\$10,000	<ol style="list-style-type: none"> <li>1. Phone to share more information and invite for a site visit.</li> <li>2. Give personal tour.</li> </ol>	<ol style="list-style-type: none"> <li>1. Ask to volunteer as a greeter for the President's Dinner.</li> </ol>	<ol style="list-style-type: none"> <li>1. President calls to thank for volunteer work.</li> <li>2. Ask to volunteer involving programming.</li> </ol>	<ol style="list-style-type: none"> <li>1. Solicit at end of year for \$10,000.</li> </ol>
<b>English, Alice</b>	\$250,000	<ol style="list-style-type: none"> <li>1. President phones to invite to private dinner.</li> <li>2. Dinner with president.</li> </ol>	<ol style="list-style-type: none"> <li>1. Invite to President's Dinner</li> <li>2. President engages her.</li> </ol>	<ol style="list-style-type: none"> <li>1. President invites to join the Board of Directors.</li> <li>2. President solicits for \$250,000.</li> </ol>	<ol style="list-style-type: none"> <li>1. President acknowledges gift in end of year newsletter.</li> <li>2. Onboarding to make Alice a spokesperson for the organization.</li> </ol>
<b>Total</b>	\$435,000				

# List of Potential Moves

- 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.
- Inviting prospect to join the board.
- Ask prospect to participate in the annual GiveBAYOU event.

So far, we have...

- Identified a major gift threshold for our organizations
- Identified major gift prospects with the capacity, interest, and willingness to give a major gift
- Analyzed the major gifts cycle and where moves management fits in
- Analyzed a sample moves management plan
- Created a list of potential moves that are specific to our major gift prospects and our organizations

## Activity

### Create a Moves Management Plan

## Directions

Fill in the moves management plan template on page 6 of your handout.

1. Write the names of your donors and ask amounts in the left hand columns.
2. Use your list of moves to fill in appropriate moves in each quarter for each donor.

# Objectives

- ✓ Identify a major gifts prospect using the major gifts prospect chart.
- ✓ Identify where a prospect is within the major gifts cycle.
- ✓ Create a moves management plan using a moves management plan template.

Today's session materials are available for free on our website.

[www.AdvanceLLC.net](http://www.AdvanceLLC.net)

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Please email us with any questions or for more information. We would love to hear from you!

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