

# Advancing Donors through the Six Steps of Moves Management

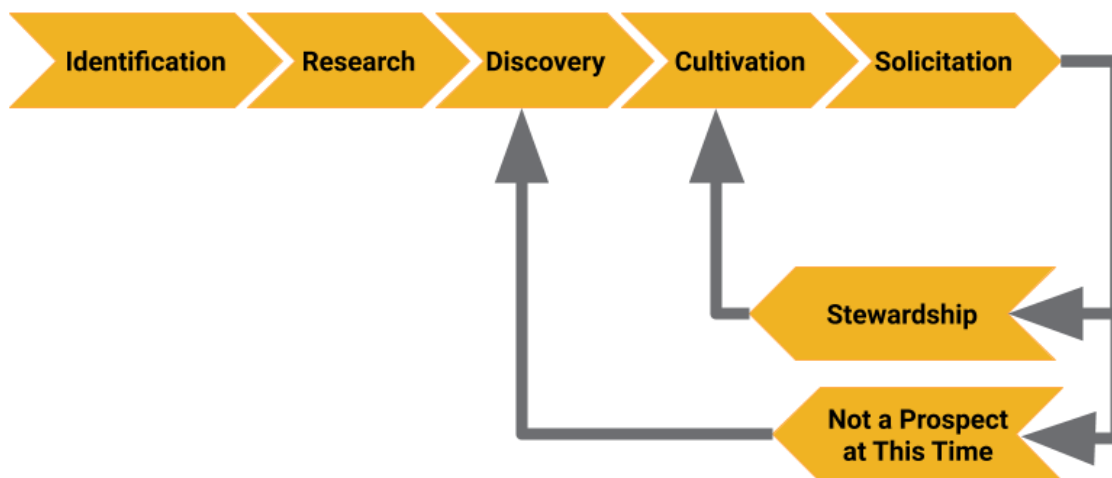
Soliciting major, leadership, and transformational gifts requires your school to build relationships with potential supporters in a process called moves management. This process identifies a prospect's affinity for your school and their capacity to give. Then, it provides your advancement team with a process for cultivating relationships with these supporters until they are ready to give.

The majority of your donor base will be annual and lead annual givers. These donors likely already have affinity for your school and the capacity to give right now. Annual and lead annual gifts are typically between \$1 and \$9,999 yearly. Annual gift givers are best reached through indirect appeals, such as a Donate Now button on your school's website, or a direct call asking for their support.

While annual and lead annual gifts are important elements of your advancement strategy, three other types of gifts have the ability to uplift your organization. Major, leadership, and transformational gifts range between \$30,000 and \$1 million or more given over the course of three years. These large gifts require planning on the part of the donor due to tax considerations. Often, they are the result of a life transition, such as the sale of a business, sale of property, or death. For these gifts, your school's advancement team should adopt a thoughtful and intentional six-step moves management strategy.

**Escale Tip:** Supporters who give at the major, leadership, or transformational level need some time to plan their gifts.

## The Moves Management Process



## Step 1. Identification

The first step in the moves management process is to identify the people or businesses who may be able to give major, leadership, or transformational gifts to your organization. These people or businesses are known as suspects.

There are a number of ways to find suspects. Ask for referrals from your current major, leadership, and transformational givers. Engage your board in a brainstorming session, and ask your staff for referrals. Your organization's leader, advancement staff, and advancement volunteers should all participate in the identification step of the moves management process.

**EScale Tip:** The moves management overarching goal: Preparing for the right person to ask the right person at the right time for the right amount for the right project in the right way.

## Step 2. Research

A suspect may turn into a prospect once you have determined their intent to give, capacity to give, and interest in giving to your school. Doing so requires a bit of research. Use an online wealth screening tool to estimate a suspect's net worth to determine their capacity. County real estate tax records can be helpful, too. To determine affinity, conduct a web search on the suspect or consult with people in your network who may know the suspect.

While this step may seem unsavory, it is very important to have an understanding of your prospects' capacity to give to your organization so you can ask for the right amount. Your management team and advancement staff should participate in the research step of the moves management process.

## Step 3. Discovery

After your advancement team has identified suspect donors and done some research to determine which suspects are real prospects, your organization should have a list of prospective donors to reach out to. While your prospects may look like they may support your organization on paper, you will learn a lot more about their affinity, capacity, and readiness to give in a one-on-one meeting or through interviews with people in their network.

Discovery requires a lot of listening and restraint on the part of the advancement team. Armed with data, it may be tempting to ask prospects right away for a gift. Resist the urge to do so, as it is more likely to turn off prospects rather than encourage them to write a check. Advancement staff and volunteers are good people to interview prospects, while management staff can support the discovery process by verifying prospects' capacity to give with the data collected during the research step.

## Step 4. Cultivation

The interviews in the discovery step of the moves management process are your organization's first efforts at cultivating relationships with prospects. Cultivation is an extremely important step in

moves management. As its name implies, this step can take considerable time, especially when large dollar amounts are involved.

Every action your team takes during the cultivation step should be thoughtful and intentional, making the case for why a prospect should give to your school. Regularly assess a prospect's affinity for your organization and their readiness to give. Advancement staff and volunteers can partner with your school's management team to complete the cultivation step of the moves management process.

**EScale Tip:** Moves management is all about *people*. Take the time to grow relationships with your prospects.

## Step 5. Solicitation

The solicitation step is where all of your team's hard work in the first four steps of the moves management process pays off. Once your team determines a prospect is ready to give, it is time for the big ask. For major, leadership, and transformational gifts, it can be helpful to share a three-year payment plan that breaks down the large lump sum into smaller annual or monthly payments.

If the prospect agrees to give, congratulations! Track their gift in your database, and move them into stewardship, the last step in the moves management process. If they decline, move the prospect back to the discovery step and continue to cultivate the relationship until they are ready to give.

## Step 6. Stewardship

In the final step of the moves management process, your advancement team thanks your donors, provides the appropriate paperwork for them to report their gifts, and moves donors back to the cultivation step to continue to build your school's relationships with them. Advancement staff, volunteers, and school leadership can all participate in the final step of the moves management process.

## Closing Thoughts

Moves management is a thoughtful process that takes time and patience. Intentionally following the process will reap rewards that will transform your school and make your organization more financially sustainable and attractive to future donors.