

# Introduction to Moves Management

FUNDRAISING FUNDAMENTALS | 2023



**CCS**  
FUNDRAISING

# Table of Contents

|   |                                     |
|---|-------------------------------------|
| INTRODUCTION: HOW TO USE THIS RESOURCE .....                  | <b>Error! Bookmark not defined.</b> |
| CCS FUNDRAISING DIVERSITY EQUITY AND INCLUSION STATEMENT..... | 3                                   |
| INTRODUCTION TO MOVES MANAGEMENT .....                        | 4                                   |
| THE DONOR CYCLE .....   | 4                                   |
| MOVES MANAGEMENT IN PRACTICE.....                             | 5                                   |
| DONOR STEWARDSHIP AND RECOGNITION.....                        | 7                                   |
| MOVES MANAGEMENT KEY TAKEAWAYS.....                           | 10                                  |

## Introduction: How to Use This Resource

CCS is proud to present this **Introduction to Moves Management Guidebook**. For over 70 years, CCS has partnered with nonprofit organizations to make a bigger impact—locally, nationally, and globally. Drawing on our firm’s experience, we are excited to provide this quick reference guide for emerging individual fundraising programs seeking to implement industry best practices. Within this book, leaders will find resources to:

- Introduce your fundraising staff to moves management
- Activate a moves management system in your fundraising efforts
- Utilize sample templates to build out new tools
- Begin to build an engagement plan for your current and future donors

## Ccs Fundraising Diversity Equity and Inclusion Statement

CCS is committed to building and developing a global team of compassionate professionals that reflects the world and communities in which we live. One where our employees – regardless of race, color, religion, gender, gender identity or expression, sexual orientation, parental status, national origin, different abilities, age, veteran status, or other invisible traits – are valued, are provided the opportunities to contribute equally, and are rewarded equitably. We believe in the importance of creating an equitable environment where everyone receives fair treatment, recognition for their accomplishments, and equitable compensation. CCS will ensure that everyone has equal access to leadership development and growth opportunities within the firm. We are committed to be a workplace that supports our team members to achieve the highest level of success.

We know and exemplify that there is strength in diversity. We believe that building a fair, just, and equitable world begins right here with us.

To fulfill this vision, we commit to taking specific, measurable actions to recruit talented professionals and encourage retention, support professional development, respect, and learn from all cultures, and create a vibrant community.

### CREATING A VIBRANT CLIENT COMMUNITY

We strive to ensure that our commitment to diversity, equity, and inclusion is reflected in the organizations and communities with which we partner. We know the importance of understanding and addressing the unique needs specific to our client partners around the world.

## Introduction to Moves Management

**Moves management** is the process by which one or more representatives of an organization lead a donor or prospective donor through a strategic engagement process towards giving to the organization. Each “move” is a step that furthers the relationship between a fundraiser and prospective donor (someone your organization would like to ask for a philanthropic gift).

The donor cultivation process is very important because the most successful financial requests are built from a strong relationship between an organization (and its representatives) and the prospective donor. Whether you are a member of the organization’s staff, a board member, or other volunteer, you can be part of the moves management process, helping to move a prospective donor through the donor cycle (see visual below). Not every prospective donor will receive a highly personalized approach. Donor engagement should begin with research to qualify and understand the donor, and this will help to identify prospective donors that require a highly personalized level of engagement.

Please see the other documents in our resource library, particularly the solicitation section, for further information about how to activate moves management and the tools within this document for your organization. The [CCS Philanthropy Now Blog](#) also provides timely updates on many topics within the fundraising space. To assist in your engagement of donors, the following downloadable sample templates and resources are available:

- Prospect Pipeline
- Volunteer Prospecting Agenda
- Engagement Plan
- Engagement Move Menu

## The Donor Cycle

Donors or prospective donors fall into one of the stages below. The donor cycle begins with identification and continues through stewardship. After thoughtful stewardship, cultivation begins again toward the next philanthropic investment opportunity.

| IDENTIFY  | QUALIFY  | CULTIVATE   | BRIEF   | SOLICIT                                     | STEWARD  |
|---|--|---|---|---|--|
| A recommended name or someone who has made an unsolicited gift, etc., with whom you have yet to interact, that you want to explore further. | Research and meet with them to learn about them and to gauge interest. | Build the relationship by sharing stories and information, inviting to events, etc. | Share the objectives of the campaign, annual fund, or other initiative, listen to feedback, and gain permission to solicit. | Ask for a pledge of support or direct gift. | Thank the donor and share the impact their gift makes. A carefully stewarded gift is the first step in cultivating toward the next gift. |

## Moves Management in Practice

### SAMPLE ACTIVITIES

For each organization and donor, the different stages of the donor cycle can look different - the underlying goal is to learn about the donor and help them learn about your work to inspire them to make a commitment. In practice, these stages could include:

#### Identify

- Donors might introduce their friends to the organization
- Event attendees or participants
- Donors to peer organizations

#### Research

- Look to identify what gifts they have made to similar organizations, or if they have made political gifts
- Research their networks, professional experience, and related interests to see if they have potentially aligned areas of interest

**Cultivate**

- Invite them to events, lectures, or activities
- Leadership could reach out to make a direct introduction

**Brief**

- Leadership to reach out and set up a specific meeting (in-person, virtual, or over the phone) to share details about the organization’s work and outline a potential way for them to be involved
- If they agree, prepare documents (if appropriate) outlining the impact of the organization’s activity, future plans, and financial need and share this information with them in the meeting to seek their feedback to the plans,

**Solicit**

- Prepare a proposal specifying the gift for them to consider and any potential recognition that would be offered
- Thank the donor for their time and make the formal request for support
- (If appropriate, the briefing and solicitation conversations could be combined)
- (Information on stewardship is available below)

**STAY ORGANIZED**

Keep things simple. Use tools at your disposal to help you stay organized and on task. The most important thing is to move the donor forward through the donor cycle, track the activity, and then return to the tracking document on a regular basis to ensure they receive regular communications. Review the linked resources in this toolkit to help track your relationship with each prospective donor. A tool like a donor pipeline can help you oversee many relationships at one time. An engagement menu and engagement plan can help you – and your team – outline what ideal “moves” or next steps look like for each prospective donor. The engagement plan should include which leader, staff member, or volunteer is responsible for which donor and activities (and when), ideally leading the way toward a successful request. Meetings with any staff or volunteer fundraisers to discuss the pipeline and progress toward requests is often a necessary part of this process; a sample volunteer agenda is also included.

## **SET TIMELINES**

As the old adage goes - there is never a perfect time. Do not allow yourself to get caught in a cultivation spiral. Set realistic deadlines for each step in your plan. Share these deadlines with all involved in the strategy and keep activity moving forward.

## **BE FLEXIBLE**

While the donor cycle may seem linear, it often is not. A change in circumstance or roadblock may necessitate a change in plans. This is to be expected. Be flexible to adjust plans depending on the situation. Act strategically with a clear, agreed goal in mind and proceed towards that outcome.

## **USE AN INCLUSIVE LENS**

At each stage of the donor cycle, be mindful of using an inclusive lens. Exclusivity in fundraising has often left prospective donors out of being cultivated toward meaningful gifts. From identification to stewardship, consider the steps you are taking and why. For example, if the prospective donor is married, are you including their spouse in the cultivation process? As you cultivate a prospect, are you coming to them with a genuine interest in their philanthropic goals and asking them how they want to be cultivated? Are you considering in what ways all individuals can be committed to your organization?

## **FOLLOW-UP IS KEY**

Cultivating a donor through the donor cycle is a process. At each stage, the relationship grows and new experiences and ideas are shared. There may be times when your prospective donor has a change in priorities or needs a bit of time to think through their options. Thus, follow-up is a fundraiser's best friend. Without timely follow-up, "moving" a donor through the pipeline becomes less possible.

## **Donor Stewardship and Recognition**

Each move in the donor cycle is highly personalized for your top prospective donors. This includes thanking donors. This process is referred to as stewardship. After successfully identifying and researching a donor, engaging them through cultivation and asking them for a gift, it is important to express gratitude for their gift. Donors want to know their gift is making a difference and want to

feel appreciated for their contribution. From thousands of conversations, CCS has confirmed that the top reason donors give is because of the real or perceived impact that their gift makes.

**Effective stewardship and recognition practices can include:**

### **TIMELY GIFT ACKNOWLEDGEMENT**

According to the Association of Donor Relations Professionals, gifts should be acknowledged within 48-72 hours after the gift is received. Receipts for charitable donations must meet IRS regulations and thus a paper (or electronic) receipt should be shared directly that includes tax ID information and related details. For more significant gifts, or to further develop the relationship, a personal note or phone call can also be shared.

### **PERSONALIZED THANK YOU NOTES**

Sometimes a personal touch can really make an impact. A handwritten note from an organizational leader can be a nice touch for donors who were thoughtful about supporting your organization, or alternatively a phone call.

### **DONOR CIRCLES**

There is power in numbers. Some organizations may benefit from starting donor circles for individuals with similar backgrounds. For example, a leadership training organization may set up a circle of alumni to give together to the organization to achieve certain monetary milestones. This also provides an opportunity for the alumni to connect and strengthen their relationship to the organization.

### **RECOGNITION LEVELS AND SOCIETIES**

There can be value in setting up levels or categories of different philanthropic gifts. Donors giving \$1000-\$4999, for instance, would receive specific recognition and outreach, and donors giving \$5000+ would receive additional, personalized stewardship. The purpose of creating these categories is to encourage donors to increase their giving in order to participate in the benefits available at higher levels, and to clearly (and publicly) share recognition for their generosity. Additionally, it provides a straightforward way to track donors and your communications with them based on their giving levels.

This can include planned giving societies, recognizing when donors leave a bequest to the organization. For example, a charter school may encourage alumni to join a legacy society by

making an intention to leave the school a planned gift. Legacy society members may then receive invitations to affinity group-based events or tailored information.

## **PERSONALIZED RECOGNITION**

Beyond standard stewardship practices, some donors may be interested in other types of recognition, which acknowledges the generosity of the donor in a more personal way. Recognition as a motivation to give will vary from donor to donor. Consider different and creative ways to thank donors for their support. Knowing that we want to help the donor feel the impact of their generosity, below are a few ways to consider bringing that impact to your supporters.

## **NAMING OPPORTUNITIES**

Naming opportunities are often offered within the scope of a philanthropic campaign wherein a donor's gift affords the chance to name a physical space, endowed fund, or current use programming at a level commensurate with their gift. For example, a donor to a food pantry may have the opportunity to have a volunteer lounge named after them, or to name an endowed fund that supports operating costs, depending on the size of the gift and the donor's interest areas.

## **CUSTOMIZED IMPACT REPORTS**

Impact reports can be printed or digital pieces that demonstrate the effect the donor made with their gift. The report may include key highlights of programming activity, photos from events or individuals your organization supports, stories, and any other information specific to what the donor supported. Best practices for stewardship involve creating an annual report to be shared with all donors; specialized reporting could be developed for priority donors.

## **PERSONALIZED STEWARDSHIP VIDEOS**

For donors that you may not see in person, you may consider creating a video. Videos might include spaces they helped to support or highlights from programs they helped to bring to life, etc. Leaders associated with those programs can help to put into context the importance of the donor's support by sharing their stories. Alternatively, consider reaching out virtually to keep in touch.

## **UPDATE EMAILS**

General updates from social media or newsletters can have a personal touch when forwarded directly to a donor with a note from leadership or staff.

In considering what level of stewardship you want to offer, consider your organization's internal capacity (staffing, time, and financial resources) to ensure you can provide consistent stewardship to different donors.

## Moves Management Key Takeaways

- Moves management is the process by which one or more representatives of an organization lead a donor or prospective donor through a strategic engagement process toward giving to the organization.
- The donor cycle includes identification, qualification, cultivation, briefing, solicitation, and stewardship. This means getting to know the donor, introducing them to your organization, engaging them directly in events or activities, and then formally sharing a proposal or pitch for them to make a gift.
- Taking time to involve the donor in the organization, rather than making a significant gift request cold, increases the likelihood because it ensures they understand the positive impact their investment could have to your nonprofit, and why this should appeal to them specifically.
- Donor stewardship and recognition is key to helping a donor see the impact they are creating with their generosity and is a needed step before engaging the donor in the next opportunity for philanthropy.