

Moves Management 101: training slides and notes

MOVES MANAGEMENT

Our Agenda for this Webinar:

1. What is “Moves Management” ?
2. Build your Moves Management Plan
We will walk through 3 scenarios to give you ideas.
3. Use DonorSnap to help!



Agenda:

Defining Moves Management

Walking through scenarios to help build your Moves Management Plan

Setting up that plan in DonorSnap

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So, what is “Moves Management” anyway?

Moves Management is the PLAN to sustain and cultivate new donors.

Moves are the steps that you (as staff, Board, etc.) take to communicate with your contacts, to move your contact into becoming a Donor.

Moves can be Phone Calls, Emails, Personal Asks, Mailings, and more, throughout the year.



Moves Management is the series of communications, the touches, that you have with your contacts. It is a Plan that you develop with your Board, Development Committee, and Staff to keep existing donors engaged, and to turn prospective donors into actual donors.

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FIRST, you must establish your Moves Management Plan

Define your Reason: Why you are raising money?

Establish your Contacts: Who are you going to ask?

Build the plan of HOW you are going to ask



Before diving in to DonorSnap or running reports of contacts, you must first Establish your Moves Management Plan.

Get out your pencil and paper. (truthfully, do it now, grab a pencil and paper).

Use the following scenarios to help you brainstorm your own plans (they might not be exactly to your needs, but will hopefully give you an idea of where to start).

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First Scenario: A Multi-Year Capital Campaign

Capital Campaign

WHY are you raising money?
 You need to raise \$3million over the next 3 years to purchase and develop your new building.
 Establish fundraising goals



In this first scenario, we will walk through planning Moves Management for your multi-year, multi-million dollar Capital Campaign.

Establishing the \$3 million need is easy, but you need to break down how much you need at various times. Do you need \$1 million each year? Do you need a larger chunk at the beginning of the campaign to get you started? This will help you develop your plan of How Many Moves - how many touches and asks - do you need to fulfill your goal.

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First Scenario: A Multi-Year Capital Campaign

Capital Campaign

WHO are you going to ask?
 Do you have existing Major Donors in your database that you can ask?
 Do you need to find new leads to reach out to?



For a large Capital or Building Campaign, most organizations begin with finding existing Major Donors.

Do you have smaller but recurring donors that you could “move” into becoming a Major Donor?

Do you have enough contacts in your existing database to reach out? Or do you need to find new Donors?

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First Scenario: A Multi-Year Capital Campaign

Capital Campaign

HOW are you going to Ask?
 Pledges vs. one-time payments
 Personal Asks – Emails – Written letters
 Fundraising Events



Now that you have established goals and an idea of who to reach out to – HOW are you going to ask for donations? This is the crux of your Moves Management plan.

Consider what methods have worked for you personally as a donor – do you read the letters and flyers you receive in the mail? Do you respond to emails and newsletters? Would an article in the Newspaper catch your eye? Have you donated to a Kickstarter or GoFundMe campaign? Would you have liked a personal phone call or meet & greet.

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Multi-Year Capital Campaign Moves Management Plan

- 2 large-scale fundraising events each year
- 1 Major-Donor Ask per year (excluding those that have already given)
- Follow-up Mailings post Major Gift
- 2 General Appeals each year to All Contacts
- Yearly Meet & Greet Events with the Board
- Tours of the building during construction

(use DonorSnap to help you manage your plan)



Here's an example of a Multi-Year Capital Campaign moves management plan.

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Second Scenario: Short Term Fundraising Goal

WHY are you raising money?

You need to buy a Van for kiddo transportation to the after-school program, and you need it in the next six months.



In this second scenario, we will walk through planning Moves Management for your short-term goal of raising money to buy a transport van.

Establishing your fundraising goals for this is a bit simpler: the dollar figure is lower, so it changes the requirements of Who to ask; and the need is immediate, reducing the number of touches and asks required to fulfill your goal.

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Second Scenario: Short Term Fundraising Goal

WHO are you going to ask?

All Contacts?

Targeted lists of those more closely associated with your organization such as Volunteers and Parents?



Let's say you need \$40K for this van, in 6 months. Does this require a Major Donor ask? Maybe not because you might have a major donor that could just Buy or donate a van to you.

This scenario likely means more personal asks, reaching out to those who are closely connected with your organization and the children: such as parents, educators, and volunteers.

Is this a place where you could bring in new donors? Government and School District employees that could get behind providing safe and reliable transportation for kiddos to your facility.

How does changing the contacts you will ask, change the type and number of moves it will take to fulfill your goal?

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Second Scenario: Short Term Fundraising Goal

HOW are you going to ask?

Personal asks to existing parents, educators and volunteers.

New Community Lead management



This is an immediate need: you might start with a general appeal to All Contacts.

Send a personal communication to your existing parents, educators, and volunteers.

Reach out to new and prospective donors from your community by inviting them to tour the after-school facility to get them involved.

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Short Term Fundraising Moves Management Plan

- 2 General Appeals to all contacts
- Personalized ask to Parents, Educators, and Volunteers
- New prospect meet & greet at the Facility with the Board
- Follow-up Phone Calls from the Board

(use DonorSnap to help you manage your plan)



Here's an example of a Short Term Fundraising goal Moves Management Plan.

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Third Scenario: Sustaining Moves Management



WHY are you raising money?
Sustaining the overall needs of the organization and maintained funding.



Not all Moves Management is because of big nor immediate donation needs.

A big part of your plan is retaining the donors you already have – and cultivating new prospects to become donors.

This is your daily, monthly, quarterly, yearly constant communication and engagement with your contacts.

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Third Scenario: Sustaining Moves Management



WHO are you connecting with? **EVERYONE**
Maintaining Existing Donors
Engaging new contacts to create new donors



Who are you connecting to maintain your donor base? **EVERYONE**. And hopefully growing that base all the time.

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Third Scenario: Sustaining Moves Management



HOW are you communicating with existing donors?
General news, updates, stories
Personal follow-ups from the Board
Grow a one-time donor to a recurring
Engage Lapsed Donors



This type of Moves Management is your most valuable tool for sustaining the prosperity of your organization. Don't simply THANK a donor for their donation with a receipt, continue engaging them with news and updates, personal stories, a phone call from a Board member. Consider how special you would feel if someone personally called you to say Thank You, and spend a few minutes sharing information about this organization that you donated to!

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Sustaining: Existing Donors Moves Management Plan

- 2 General Appeals to all contacts
- Quarterly newsletters with personal stories about your organization
- Follow-up phone call from a Board Member after \$100 or more donation
- Twice a year communication to lapsed donors
- Targeted mailing to consistent donors asking to become a Recurring donor

(use DonorSnap to help you manage your plan)



Here's an example of a moves management plan for existing donors.

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Third Scenario: Sustaining Moves Management



HOW are you cultivating new donors?

- Personal communication from the Board
- Meet & Greets
- Engaging stories and updates



Do you have Board Members or a Development Committee charged with bringing in new contacts? Implement a plan for adding new "Friends" to your database.

Build a Moves Management plan to maintain communication with them, hopefully ending in a Donation.

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Sustaining: New Prospects Moves Management Plan

- Board Introduction
- Board Follow-up Phone Call
- Meet & Greet with the Board at the facility (if you have one)
- Follow-up mail/email after 3 months if still no donation

(use DonorSnap to help you manage your plan)



Here's an example of a moves management plan for cultivating new donors.

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NOW: How Can DonorSnap Help?

Individual Ticklers to remind you of contacts to reach out to

Interactions to record past communications

Add fields to your database to track "Status" or similar, to recognize where the contact is in your Moves Management plan.



Let's go Play in DonorSnap!