

# Moves Management 101



Kat Carson,  
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SESSION DATE: Thursday, October 13 2016

SESSION TIME: 9:00am

# Moves Management 101 - Agenda

- What is Moves Management?
- The Prospect Pipeline
- What Else Can We Do?



# What is Moves Management?

- Broadly speaking, **moves management** involves planning and tracking activity as a philanthropic prospect advances through the **donor cycle** towards a goal, commonly a gift to an organization



# What is Moves Management?

- May be the fundraiser's responsibility; or
- May involve a partnership with Prospect Research and/or Prospect Management
  - Frontline fundraisers engage prospects in the community while Prospect Research and Prospect Management assist with the discovery, capture, and maintenance of prospect data



# What is Moves Management?

- Emphasizes the importance of **building meaningful, mutually-beneficial relationships** with donors
- (In other words - not JUST about securing a financial contribution to an organization)



# What is Moves Management?

- Moves management incorporates both the data collection and maintenance to capture **financial metrics** as well as the qualitative information that reflects the **development of the relationship** between the organization and the prospect (Gardella, n.d.).
- Considers the maturity of the relationship between the organization and the prospect meaning the fundraiser can plan approaches and engagement which are more meaningful and relevant



So...how do we do this?



# The Prospect Pipeline





# The Prospect Pipeline

- The functional structure of moves management is the prospect pipeline – the list of a fundraiser’s prospects – which:
  1. is commonly divided into phases; and
  2. promotes the progress of a prospect through the donor cycle towards the goal by setting phase timelines and monitoring phase aging



# The Prospect Pipeline

- The prospects within the pipeline are often segmented into **stages** or **phases** which indicate the depth of the relationship between a prospect and the organization. This is useful in a number of ways:
  1. Organize opportunities for engagement
  2. Guide data collection leading to reliable reports



# The Prospect Pipeline

- Depending on the complexity of the organization, there may be fewer or more phases, but generally they fall into one of four categories:
  1. Qualification (Identification, verification)
  2. Cultivation (Relationship building)
  3. Solicitation and close (Ask and securement)
  4. Stewardship (Appreciation, recognition)



# The Prospect Pipeline - Qualification

- Incorporates both the identification and verification of potential prospects
  - **Identification** – Finding potential, brand-new prospects to the organization who may be able to provide support at a certain threshold
  - **Verification** – Confirming that the prospect is viable, meaning strong linkage, interest, and capacity
- How can Prospect Research and Prospect Management support moves management in Qualification?



# The Prospect Pipeline - Qualification

- Key activities that take place during Qualification can include:
  - Prospect Research identifying new prospects through networking, referrals, data mining
  - Discovery of a prospect's **ability** or financial capacity to support the organization, **linkage** or relationships to the organization, and **interest** in providing support to an initiative
  - Clearance for approach, if necessary, has been granted
  - Meeting with the prospect to verify linkage, interest, and status as a prospect through contact between the fundraiser and the prospect



# The Prospect Pipeline - Qualification

- Data captured during this phase reflects the internal work being done to identify potential prospects and can include:
  - The prospect phase
  - The project (the name of project/funding initiative/designation - ranging from the organization itself down to specific attributes that identify priorities or projects within the organization)
  - The name of the project manager (fundraiser accountable for advancing the relationship)
  - The date the prospect moved into this phase (used for monitoring phase aging)



# The Prospect Pipeline - Qualification

- Qualification ends when the prospect capacity and interest has been verified through direct interaction and the prospect is
  1. Assigned to the fundraiser's portfolio; or
  2. Redirected to another fundraiser's portfolio; or
  3. Released/disqualified



# The Prospect Pipeline - Cultivation

- Involves relationship building, strategy development, and proposal development
  - **Relationship building** – Initiate and strengthen relationships by engaging prospects in various opportunities within the organization
  - **Strategy development** – Develop a plan to advance the relationship and the ask, lay the groundwork
  - **Proposal development** – Prepare for the ask
- How can Prospect Research and Prospect Management support moves management in Cultivation?





# The Prospect Pipeline - Cultivation

- Key activities that take place during Cultivation can include:
  - Discovering the prospect's interests through interaction
  - Identification of project partners, volunteers
  - Early strategy development
  - Development of timeline for target ask
  - Regular face-to-face contacts
  - Development of organizational relationships with key partners
  - Positioning the prospect for a solicitation
  - Proposal development and refinement



# The Prospect Pipeline - Cultivation

- Data captured during this phase reflects building the relationship and can include (note that the data captured builds on what was added in earlier phases):
  - The prospect phase (Cultivation)
  - The project
  - The name of the project manager
  - The date the prospect moved into this phase
  - The target ask amount (how much the ask is, the amount presented to the prospect in the proposal)
  - The target ask date (when the ask will be presented to the prospect)
  - The overarching strategy (high-level goals for the prospect)
  - Immediate next steps (quantitative framework that supports the overarching strategy)



# The Prospect Pipeline - Solicitation

- The formal presentation of an ask
- How can Prospect Research and Prospect Management support moves management in Solicitation?



# The Prospect Pipeline - Solicitation

- Key activities that take place during Solicitation can include:
  - Clearance for solicitation, if necessary, has been granted
  - Formal proposal is presented to the prospect
  - The ask for support is made



# The Prospect Pipeline - Solicitation

- Data Captured during this phase reflects the proposal and forecasting, and can include:
  - The project
  - The name of the project manager
  - The date the prospect moved into this phase
  - The target ask amount
  - The target ask date
  - Overarching strategy
  - The amount expected (an estimate made by the fundraiser of the amount of the ask the prospect will give or pledge)
  - The date expected (the date by which the gift is expected to be received)
  - Likelihood (an estimate of the likelihood of receiving the amount expected by the date expected)
  - Updated next steps (updated to reflect the specific activity necessary to complete the gift)



# The Prospect Pipeline - Close

- The work done to secure or **close** the commitment.



# The Prospect Pipeline - Close

- Key activities that take place during Close can include:
  - The gift agreement is refined and finalized (in conjunction with the prospect and the organization)
  - The fundraiser actively works with the prospect to close the agreement



# The Prospect Pipeline - Stewardship

- **Stewardship** begins with receipt of the gift
- Involves the gift being received and completed, as well as thanking donors for their gifts and to provide accountability and transparency for the management of the donated funds
- Not the end of the donor cycle but an integral part of the relationship to bring a donor back into the pipeline
- Stewardship is a catalyst to continue movement through the donor cycle by emphasizing the donor's connection to their gift and inspiring them to give again
- How can Prospect Research and Prospect Management support moves management in Stewardship?





# The Prospect Pipeline - Stewardship

- Key activities that take place during Stewardship can include:
  - Gift announcement, recognition event
  - Reporting back to the donor about fund performance and gift impact

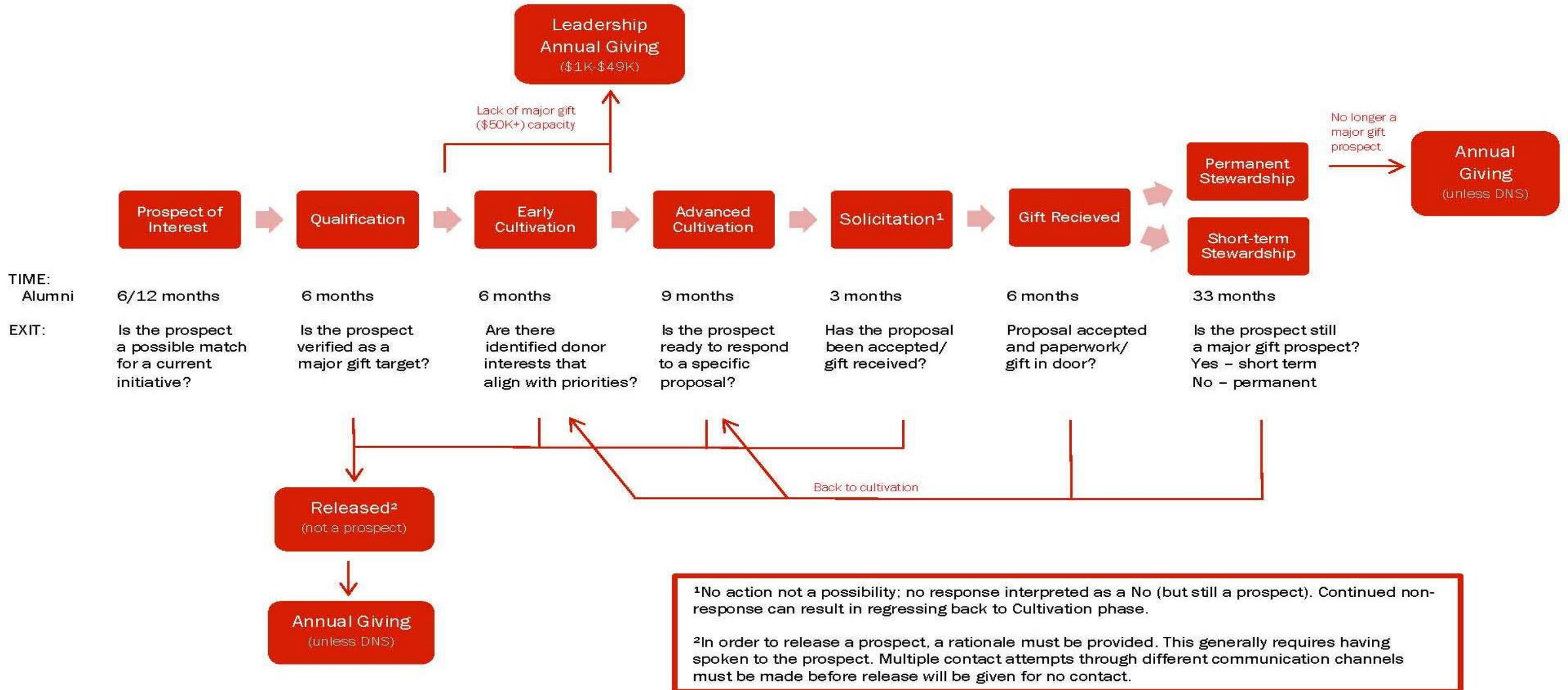


# The Prospect Pipeline - Stewardship

- Data captured during this phase reflects the internal work being done to identify potential prospects and can include:
  - The prospect phase
  - The project
  - The name of the project manager
  - The date the prospect moved into this phase
  - The target ask amount
  - The target ask date
  - The amount expected
  - The date expected
  - Likelihood
  - The amount funded (full amount of the gift or the pledge)
  - The data funded (the date the gift or the pledge was received)
  - Overarching strategy (updated to reflect the shift from prospect to donor, movement back into the donor cycle upon receipt of the gift, opportunities for continued engagement beyond receipt of the gift)
  - Updated next steps (updated to reflect the stewardship activities and pipeline re-entry)



# The Prospect Pipeline - UCalgary



# What Else Can We Do?

- Moves management incorporates both the data collection and maintenance to capture financial metrics as well as the qualitative information that reflects the development of the relationship between the organization and the prospect
- In other words, we have both quantitative and qualitative data
- What else can we do with this data?



# What Else Can We Do?

- Phase Aging & Progress Through the Pipeline
- Portfolio Balance
- Reporting



# Phase Aging & Progress Through the Pipeline

- Monitor progress through the pipeline by phase **timelines** and **phase aging**
- Timelines
  - Are critical to ensure prospects do not stagnate in any one phase
  - Provide a way to monitor and report on prospects to ensure they continue to advance in a timely manner
  - Help with strategy development



# Phase Aging & Progress Through the Pipeline

- Typically, phase timelines are as follows:

Qualification	Cultivation	Solicitation & Close	Stewardship
3-6 months	6-15 months	1-3 months	Review every 6-12 months



# Phase Aging & Progress Through the Pipeline

- Phase aging indicates how long a prospect has been in its current phase
  - Flag prospects who have exceeded the recommended timeline
  - Highlight prospects who are in need of advancement through or, potentially, release
  - Promote prioritization
  - Reduce “stale” prospects and incidents of “gate-keeping.”





# Portfolio Balance

- Moves management data can help fundraisers balance their portfolios
- Track and report on the number of prospects fundraisers are engaging and the phases those prospects are in
- Provide guidance regarding where fundraisers may have room to grow their portfolio by qualifying new prospects



# Portfolio Balance

- Mature portfolios should work towards a balance between the phases and number of prospects as outlined here



# Reporting

- Pipeline Report
- Phase Aging Report
- Portfolio Balance Report
- Forecasting Report
- Discounting Report



# Questions?



# Contact!

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# Thank You!



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