

# Management File

Tips, resources and information to better manage and develop your working life

By Heather Burton and Fayruz Benyousef, CFRE



Management File is designed to help readers overcome management and work challenges, while also providing tips, tools and resources of interest to nonprofit executives. If you have a management tip, challenge or information you would like to share, please email [ap@afpnet.org](mailto:ap@afpnet.org).



Jim Dancy/Getty Images

## Strategic Moves

Moves Management®—we all have heard the term and know that it needs to be part of every nonprofit’s fundraising strategy. Do you know where to begin?

Moves management does not have to be mystifying. In fact, those new to the concept are probably doing it already—just not in a proactive or systematic manner. Moves management, at its core, is about the relationship your organization has with your donors and how you strategically deepen each relationship through the stages of awareness to commitment to your organization’s mission and values.

Key components of a moves-management program include a process and an infrastructure to support that process, both of which should be designed to fit your organization’s culture, resources (staff, board, volunteers and technology) and donors.

### Initiating the Process

Before actually starting a moves-management program, you must commit to formalizing the process. This may sound silly, but for moves management to really work, there needs to be structure, discipline, documentation and follow-through. If key stakeholders—executive director or CEO, board chair, development chair, chief development officer—in your organization cannot commit to engaging in the process, then moves management will continue to be done in a nonsystematic, ineffective manner.

Once you have formalized the process, continue with the following:

**1. Determine the “champion” of the moves process.** This is the leader of the team or the keeper of the goal. This may be the same person who is doing most of the moves in small nonprofits, or it may be a board member, major-gifts officer or executive director in larger organizations. The champion’s responsibility is to make sure that all the team members are following through on their actions, that information is being recorded in the “system” and that the initial intent of the process is being upheld.

**2. Establish a core moves team.** For some organizations, this may be the executive director and president of the board; for others, it may be the entire development and board-fundraising teams. This core team remains fairly constant, no matter who is identified to be “moved” in the process.

**3. Identify an appropriate number of donors or prospects to include in the process.** Moves take time and effort, so start small. It may be only five or 10 people, or it might be up to 50 people, depending on the size of your organization and development or moves teams. You may want to cultivate more people than you have identified, but remember, this is a process that requires work, commitment and follow-through. To be truly successful, the process requires a certain level of diligence, taking time and resources. First find your rhythm, and then expand as appropriate. This helps to avoid overwhelming the team with unrealistic goals and expectations.

**4. Decide whom to move.** Even more important than choosing the right number of people is choosing *whom* to move. Donor profiling can play a big role in this identification. Keep in mind that there may be many more potential moves than your staff can support. A great start is small and allows for growth. For each individual identified to be moved, ask yourself, “Who is the appropriate person to cultivate this relationship on behalf of our organization?” Natural partners are best—friends, colleagues or mutual partnerships. They are the first movers.

Next, identify those second in line for supporting the relationship with your organization. For example, the primary moves manager may be the president or CEO of the organization, but a supporting partner may be the director of outreach programs or the board committee chair for programs, as the donor or prospect is deeply interested in the organization’s outreach initiatives. These “secondary” movers may come and go, depending on which

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## Embracing Technology for Moves Management® Success

How can technology help with your organization's Moves Management®? Read "Embracing Technology for Moves Management® Success," by Kathryn Johnson and Bo Crader, Blackbaud Consulting Services Group, which is available at no charge at [www.blackbaud.com/bb/movesmanagement/adol/cow.aspx](http://www.blackbaud.com/bb/movesmanagement/adol/cow.aspx)

donors you have identified to move.

At this point, you have started a moves-management process. Congratulations! You have committed to the process, developed the moves team

and identified those you want to move. What else is there to do?

### Recording and Tracking

A key component of a moves-

management process is the recording and tracking of the various moves strategies. Regardless of how big or small or how tech-savvy your organization is, you need some sort of system to keep track of moves. At the very minimum, you need to track the information or moves using a simple spreadsheet. For organizations with more advanced capabilities, donor management software provides this useful tool.

Regardless of technology, it is always a best practice to keep a hard copy file for the individuals whom you are engaging in the moves-management process. Generally, these are major-gift donors or prospects. Individual donor

## Reviews and Comments

Because we know how difficult it is to keep up with recently released publications, we have asked AFP members to review current books and share their thoughts with you. Please note that a mention in this column does not constitute endorsement. These minireviews are meant only to aid your own research. Books marked with an asterisk (\*) are available through the AFP Bookstore ([www.afpnet.org/afp\\_marketplace\\_and\\_bookstore](http://www.afpnet.org/afp_marketplace_and_bookstore)).

*The Not-for-Profit CEO Workbook: Practical Steps to Attaining & Retaining the Corner Office* by Walter P. Pidgeon Jr. (John Wiley & Sons, 2006), paperback, 168 pages.

When I ask my nonprofit colleagues (especially my baby boomer cohorts) how they ended up working in this sector, most weave an interesting tale of the circuitous path by which they arrived at their paid job in a nonprofit leadership position. Thus, it seems that we can truly celebrate our maturity as a sector when individuals write and publishers publish career guides such as this one—how to aspire to and prepare for a job as a nonprofit CEO.



This workbook outlines career preparation from college to the corner office. It illustrates those paths using five fictitious characters—an interesting device for finding a situation closest to your own.

I think the author's most valuable contribution is the advice he gives on the due diligence required in pursuing a CEO job, whether transitioning from a for-profit, moving up the nonprofit ladder or moving from one executive director job to another. Perhaps this workbook can reduce the number of CEOs

who find themselves in an impossible job or toxic organization because they failed to ask sufficient questions—before they accepted their new positions—to surface their employer's hidden skeletons, whether that is a marginal financial condition, staff dysfunction or the board's antagonistic relationship with past CEOs.

Reviewed by: Gayle L. Gifford, ACFRE, president, Cause & Effect Inc., Providence, R.I.

*Grant Proposal Makeover: Transform Your Request From No to Yes\** by Cheryl A. Clarke and Susan P. Fox (Jossey-Bass, 2006), paperback, 224 pages.

Whether you are new to grant writing, a seasoned writer or a part time writer, *Grant Proposal Makeover: Transform Your Request From No*



*to Yes* is a great resource. This quick-read book offers good examples to follow and bad choices to avoid, as well as tips and feedback from those who fund your proposals. A wide range of topics, from what to include and how to include it to when it is too much and how to organize it, are all covered by Clarke and Fox. Their style allows the reader to glean their knowledge on a specific topic to strengthen

a proposal with ease. Having polled funders and grant reviewers from across the country, the authors have collected information that will help you and your organization be successful in this important area of funding. The book not only will serve as a great resource for review, but also will provide a format for proposals of all sizes and types.

Reviewed by Betty Johnson, CFRE, president, Betty Johnson & Associates, Manhattan, Kan.

files ought to contain information that is respectful to that individual—records your organization would be honored to show the donor if asked.

The type of information kept in the donor's file might be contact reports, which summarize key visits with the donor as well as the next "move," and other relevant information such as copies of thank-you notes, letters from the donor that may be included with a gift, or noteworthy media articles about the donor.

Along with reporting on the moves strategies themselves, each time your movers contact a donor they are engaging, that action should be recorded and reported. Provide contact report forms in both hard copy and electronic format to make it as easy as possible for your movers to report back to you. Without this critical information, you will not be able to determine forward movement in the process, nor will you be building an institutional memory connecting that donor to your organization.

In addition to recording and tracking, it is essential to set up consistent meetings with your moves teams, to keep your process on track, determine next steps and make adjustments, where appropriate. Moves team meetings are also a great place to share ideas and tactics that were successful for other team members.

### Focusing on Donors


As with all cultivation and retention strategies, moves management must happen from a donor-focused perspective. Be sure you understand how the prospects or donors you are moving wish to be engaged with your organization, and make sure your movers respect those boundaries. Again, moves management is a process, not a hit-and-run activity. You probably already understand why these individuals give to your organization. If not, find out and tap into that passion!

Knowing your donors—why they

give, why they are invested and the level at which they are invested—gives you key data for planning next steps. Depending on a donor's status within the continuum, moves can include a face-to-face meeting, a phone call, a personal note or an agency or program tour. Moves also can be aligned with other on-going fundraising activities, such as a special event. In fact, the moves-management process should be considered a vital piece of your overall fundraising and development strategy.

### Obtaining Desired Results

Moving donors up the giving ladder takes time and requires a donor-focused attitude. This is a disciplined process, with a clear, strategic approach. It does not have to be overwhelming. As you establish your own unique pro-

cess for your organization and donors, make sure everything you do is centered on the donors and the value they receive from being involved in your organization. Over time, the relationships you establish will not only create a win for your organization, but also be a win for your donors and, most importantly, for your organization's mission. 



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