



Major Gifts

FOR YOUR CAMP



Moves Management Overview

What is it?

Moves management is a tool for bringing a structured, intentional, systematic approach to major gifts fundraising. While major gifts success relies on deepening personal relationships with your most generous donors, moves management is intended to apply structure and discipline to the major gifts cycle to assure that each relationship receives the care and attention necessary to move donors successfully to a meaningful major gift.

Your donor management system is an essential tool in Moves Management. Capturing and tracking relevant data is critical through all the stages of Moves Management in order to create strategies that address each donor's history and preferences. And reporting relevant, timely data is indispensable for regular Major Gifts Team reviews of donor/prospect actions. A Major Gifts Team member should be assigned responsibility for the data management function.

While there are many variations on Moves Management and its stages, we recommend a simplified approach of four stages to move donors through the giving cycle.

Qualify (sometimes called Identify, Research, Discover, Predispose)

Purpose: To assemble the knowledge needed to help you craft an effective personal engagement plan for each donor, leading to a successful solicitation. The goal is to discover relevant information for each donor or prospect which includes: personal "camp story;" camp connections; motivation for supporting camp; donor experience with camp; overall gift capacity; other personal philanthropic interests and values; communications and engagement preference; and inclination and specific program/project interest to consider major gift support for camp. Qualification may take place in a single meeting with a donor or over multiple interactions with the donor as well as others who know them well.

Engage (often called Cultivation)

Purpose: To deepen each donor's knowledge, experience, and commitment to camp by bringing them into a closer, insider relationship with the organization. Based on your learning in the Qualify stage and a menu of camp-specific engagement options, design and deliver a set of individualized contacts, experiences, interactions, and information that meets each donor's preferences. The length of the Engagement stage will vary by donor. Some may be ready to entertain a giving opportunity after one or two powerful engagement experiences, while others may take several months of effort to capture their attention and interest.



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Ask/Close (also known as Solicitation)

Purpose: To present a specific giving opportunity to a qualified, engaged donor/prospect. Based on each donor's experience through the qualification and engagement stages, the Ask takes place when camp leaders/Major Gift Team member(s) with whom the donor has built a strong relationship have a personal conversation to present a targeted, specific gift opportunity that reflects the donor's camp interests, philanthropic and personal goals, and giving capacity, as well as camp's priorities.

The Close happens after an ask when a donor/prospect has not given a definite response (a very common situation). After the ask conversation, closing agree on specific follow up steps for the Major Gifts Team member – with deadlines - to allow the prospect to confer with family or legal/financial advisors, reach a giving decision, sign pledge forms, arrange for transfer of assets, etc.

Steward

Purpose: To confirm that a donor's gift has been received, applied appropriately, and has delivered the outcomes and impact envisioned when the gift was solicited and committed. Beyond the immediate acknowledgement and thanks, Stewardship serves as a continuation of Engagement to further deepen the donor relationship after a gift commitment. As with the Engage stage, based on donor preference and a camp-specific menu of Stewardship options, design and deliver a set of post-gift experiences, invitations, interactions, and information intended to confirm the donor's intentions have been achieved, inform the donor of the outcomes and impact of their gift, and affirm their place as an important partner in camp's success.