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FUNDING YOUR ORGANIZATION THROUGH RELATIONSHIPS

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FUNDING YOUR ORGANIZATION THROUGH RELATIONSHIPS

• What to Know About Moves Management. What does it comprise?

• The Process

• Getting Started

• Systems and Tools

• Implementation
  • Large development operation
  • Small operation

• Review and Analysis

• Q&A
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WHAT IS IT?
• “A series of initiatives or moves to develop each prospect’s
  • Awareness of;
  • Interest in;
  • Knowledge of;
  • Involvement with;
  • And commitment to the institution and its mission”
- David Dunlop
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Simple Definition of Moves Management

- A disciplined and intentional process
- Using moves managers
- To keep donors and donor prospects INVESTED in the institution. **The scientific part of fundraising**

Even More bluntly:

- Making and keeping friends

Values

- Organizational
- Donor and Donor Prospects
- Know Them!
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THE PROCESS

• SIX KEY STEPS
  • Review the prospect/donor relationship with your institution
  • Plan the most beneficial next moves (donor centered)
  • Coordinate and check plans with others involved
  • Execute the moves
  • Evaluate what happened
  • Report back to all stakeholders involved
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- Success is Based on the
  - Quality
  - Frequency
  - Continuity

- Of the Moves.
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- The Funding Cycle
- ID
- Cultivate
- Solicit
- Receive Gift
- Stewardship/Cultivate
- Stewardship/Cultivate
- Stewardship/Cultivate
- Solicit
- Requires a Lot of “Rights”
  - The right strategy
  - The right person(s) asking
    - For the right project
    - And the right amount
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• Cycle repeats. “Time and focus should not be focused on acquisition but on reinforcing existing donors’ support.”
• Penelope Burk

• Meaningful information on investments at work is the key to repeat giving. Communication leads to success. Underperformance means a failure to communicate.
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• GETTING STARTED
  • Establish prospects
  • Quantify number, given resources available
    • Primary (natural, strong relationship)
    • Secondary (contribute to further relationship)
    • Volunteer contracts (triangulation)

• Set Moves Management as a component of development meetings
  • Establish standing meeting with Moves Managers to plan and evaluate moves and revise strategies as needed
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• Examples of Next Steps/Next Moves
  • Personal visit to experience a program
  • Personal visit with the ED
  • Phone call update
  • Handwritten note with follow up materials
  • Email update
  • Tour
  • Event

• Establish Tracking
  • Moves Report
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IMPLEMENTATION

• Smaller operations
  • Seek commitments from all stakeholders of relevance
  • Start slowly with a small number
  • Be disciplined
  • Evaluate regularly
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• How do you measure success?
  • It must be quantifiable
  • Number of solicitations and success rate
  • Amount of money raised towards Major Gifts Initiative
  • As a ‘Trickle Down”, you should have:
    • More engaged donors
    • More annual gifts
    • Better attendance at events
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• Providing Guidelines
  • Set dollar goals
  • Determine number of solicitations
  • Guidelines for meaningful contacts monthly
  • Regular staff assessments – what is working?
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• Larger Operations

• “How can we improve what we already do?”
  • Evaluate major donor/prospect relationships
  • Where do they stand?
  • Is our system efficient?
  • What areas need improvement?
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Benchmarks for a Major Gifts Officer

• Prospect Base – up to 150
• Expectations
  • One-third active movement toward solicitation
  • One-third moving from small annual gifts to major gifts
  • One-third ‘suspects’ being qualified and introduced
  • 40-50 solicitations annually
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Review and Analysis

• Disciplined Systems and Process

• Consistent Planning and Evaluation

• Moves, Managers, Primaries, Secondaries

• Infrastructure and Tracking