

# Make Your Move: Building a Relationship Management Program from the Ground Up

## Speakers:

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- Krishna Kelley, Associate Director of Prospect Research and Management, UT Southwestern Medical Center
- Kelley Atwood, Development Applications Administrator, UT Southwestern Medical Center
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# Moves Management

What are Moves? The actions and steps you take to...

1. Bring in prospective donors
2. Get to know them
3. Engage them in your organization
4. Ask them for money
5. Develop lasting relationships

Moves Management is the system you set up to...

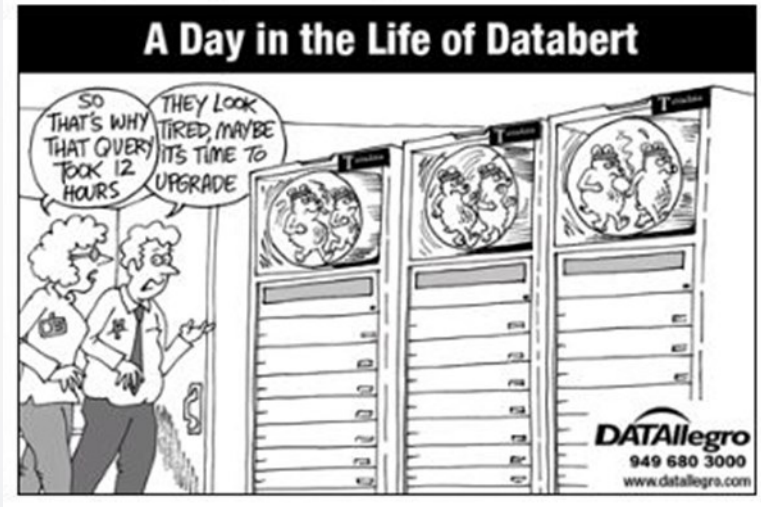
1. Plan,
2. Organize, and
3. Track moves



# Strengthening the Infrastructure

- **Old:** DOS-based fundraising system dating back to 1988
- **New:** Raiser's Edge go live in August 2014

*...but, we couldn't wait to begin the implementation of a moves management process!*



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# Transitioning to a Long-Term, Strategic Fundraising Model

- **Old:** President = Chief Development Officer
- **New:** Team-based, strategic fundraising
- **Old:** Principal gifts from small number of donors
  - Our current donor base is aging and cannot sustain our philanthropic needs indefinitely
- **New:** Expand donor base and engage next generation of major donors



# What do we know about our donors and prospects?

- **Old:** Only entered demographic and gift information in our database
- **New**
  - 70,089 affinity scores added (based on RFM formula we designed in-house)
  - 20,761 capacity scores added
  - Added appeal codes
  - Now utilizing prospect management function to enter comments



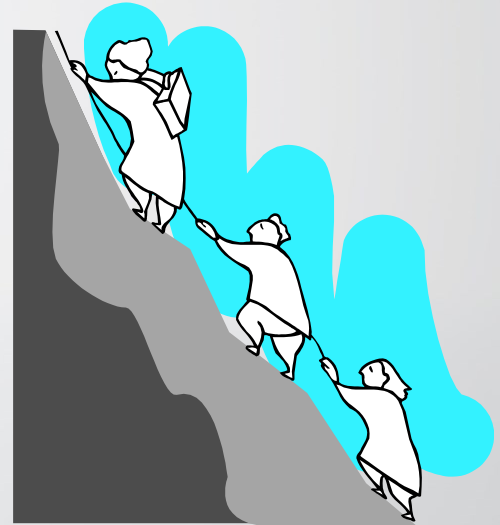
# Moving Through the Donor Cycle

- Prospect Identification
- Research/Qualification
- (1+ 2 = Discovery)
- Cultivation/Engaging the Prospect
- Solicitation
- Stewardship



# How to start building the pipeline?

- Who are your natural constituents and how can you find them?
  - Grateful Patients, Parents, Alumni, Volunteers
- Who can help you find them?
  - Board Members, Physicians, Deans
- How to convert natural constituents to donors?
  - Targeted mailing to patients
  - Physician Engagement



# Is it possible that we already have donors in our database now, to fill the pipeline?

## Annual Fund Program Overview

AF 2012	AF 2013
\$379,000	\$785,000
373 Gifts	690 Gifts
\$1017 Average Gift	\$1138 Average Gift
1.8% Response Rate	2.8% Response Rate





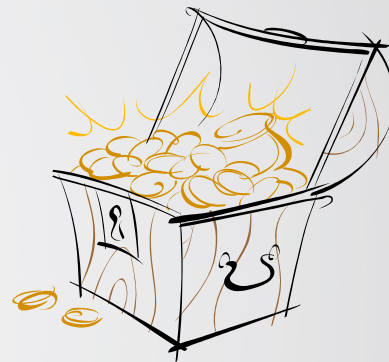
# Annual Fund Donors – Who Are They???

- Where do they live?
- How frequently do they give to us?
- What is the size range of their gifts?
- What mailing piece do they respond to?
- What is their gift capacity?



# Learning More About Annual Fund Donors

- Thank You phone calls
  1. Important source of donor info
  2. Important stewardship leading to next gift
- Reports - Can we get info we need from our database?
- Creativity and collaboration yielded rich data
- How to build reports that tell us what we want to know.



# Segmenting our donors

- We wanted to know more about our donors
- We wanted to be strategic
- We knew the key was to take a deeper look at our database



# Segmenting our donors

- This can be a major undertaking, but don't be intimidated
- Create simple, clear, and effective metrics
- We have three we use
  - RFM (first run in 2011 and refreshed in 2013)
  - Wealth capacity (uploaded in 2013)
  - Predictive modeling (results received in February 2014)



# Internal data model

**R**ecency (year of most recent gift)

**F**requency (total years with a gift)

**M**onetary (total lifetime household giving)

- Our definition:
  - An attachment measurement based on the giving history of the prospect



# RFM Results:

Raw	Rating	Total	% of Total
3 4	<b>Least Attached</b>	<b>13,955</b>	<b>45.0%</b>
5 6 7	<b>Less Attached</b>	<b>13,111</b>	<b>42.3%</b>
8 9 10	<b>Attached</b>	<b>2,513</b>	<b>8.1%</b>
11 12 13	<b>More Attached</b>	<b>1,074</b>	<b>3.5%</b>
14 15	<b>Most Attached</b>	<b>338</b>	<b>1.1%</b>



# Wealth Capacity

- Go with a trusted source
  - There are many options out there
  - Ask for demonstrations & compare side by side
  - Get peer input
- Focus on the quality, not the price
  - This is an investment
  - Think long term



# Wealth Capacity

- Our definition:
  - A fundraising estimate of the amount the prospect can give to charity over a five year period
- Results:
  - More than 20,000 records with capacity of \$25,001 or greater





# Next step

- Q: How do we find donors with high levels of attachment and high capacity?
- Q: How do we find donors with low levels of attachment and mid-level capacity?
- Q: How can we narrow down our prospect pool?
- A: Customized reporting



# Creating a Report

Name	Amount	AF Date	Last Gift \$	Last Gift	Local?	RFM	Capacity
W. Disney	\$7,500	1/2/2014	\$2,500	2009		3	\$250k - \$500k
J. Cricket	\$5,000	12/30/2013	\$500	2008	Houston	2	\$50k - \$100K
M. Mouse	\$1,000	11/26/2013	\$750	2010		4	\$250k - \$500k
A. Rose	\$1,000	12/27/2013	\$200	2010	Nevada	2	\$100k-\$250k



# What are the next steps?

- Review the reports, assimilate the data, and work closely with prospect research team to target prospects.
- Narrow the focus, strategically assign donors qualifying as “Leadership Giving” prospects – the donors “in the gap”.
- Building the donor relationship – engage, re-engage and discover.



# Cultivate, Cultivate, Cultivate

- Develop the relationship with the prospect through both active and passive activities
  - Passive activities include mass mailings and newsletters, cards and emails
  - Active activities include individual and group meetings and phone updates and conversations
- You will need six or more “touches” to properly cultivate each major gift prospect before asking for the gift
- Tracking touches

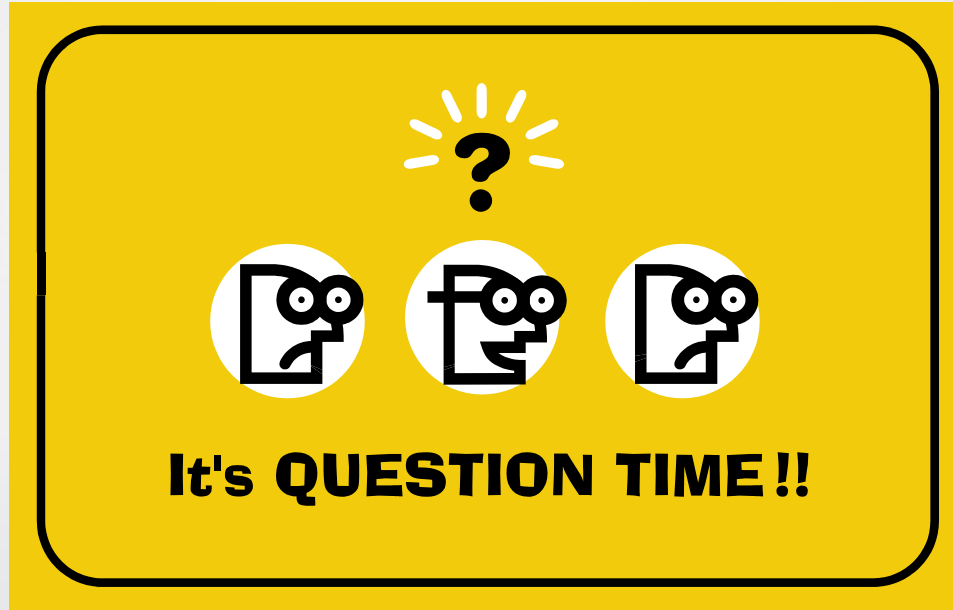


# Real-time case study

- Track each stage of the donor cycle
  - Identification
  - Qualification
  - Cultivation
  - Solicitation







# Using Raiser's Edge: Identification & Qualification

## Identification

- Queries
- Reports
- Screening and Modeling

## Qualification

- Confirm the prospects likelihood/capacity
- Move Prospect Status to Cultivation, if applicable
- Assign solicitor





# Using Raiser's Edge: Identification & Qualification

- Use “Moves Stage” on record and update when research is complete to identification
- Enter research finding into appropriate Raiser's Edge fields – more than just entering in the Notes!

Data	Raiser's Edge Field
Personal Family/Friend info	Individual Relationship
Work history, religious/community involvement	Organization Relationship
Education History	Education Relationship
Wealth/Giving info, ratings, status	Prospect Tab
Prospect Status	Attribute or Prospect Tab
Gifts to other organizations	Prospect tab



# Using Raiser's Edge: Cultivation

- Determine strategy and set up actions (and possibly assign to an action track)
- Update record as information changes or with new information
- Use dashboards and reports to keep track of actions
- Set up home page to help you stay on track



# Using Raiser's Edge: Cultivation Action Tracks

- String together single actions to engage a moves strategy
- Create Action Tracks for different groups and reuse as appropriate
- **Progress:** Define Track → Assign Track → Run Reports to follow completion of actions
- **Conditions:** Build dependencies around
  - Whether an action has been completed
  - Whether there is an “interest”
  - Status code of the action
  - Any Action field

***Tip: Determine the track's workflow on paper first,  
then create it in Raiser's Edge***



# Using Raiser's Edge: Cultivation Tracking Progress

## Viewing Actions and Reminders

- Constituent Record: at-a-glance view of all actions for constituent
- Home Page: one-stop destination, created workflows for your moves program
- Dashboard: Auto-remind feature alerts of upcoming actions (Action Reminders panel)

## Action Reports

- Action Detail
- Action Summary
- Ticklers

## Home Page and Dashboard

- Constituent Action List
- Solicitor Action List
- Action Reminders
- Action Query



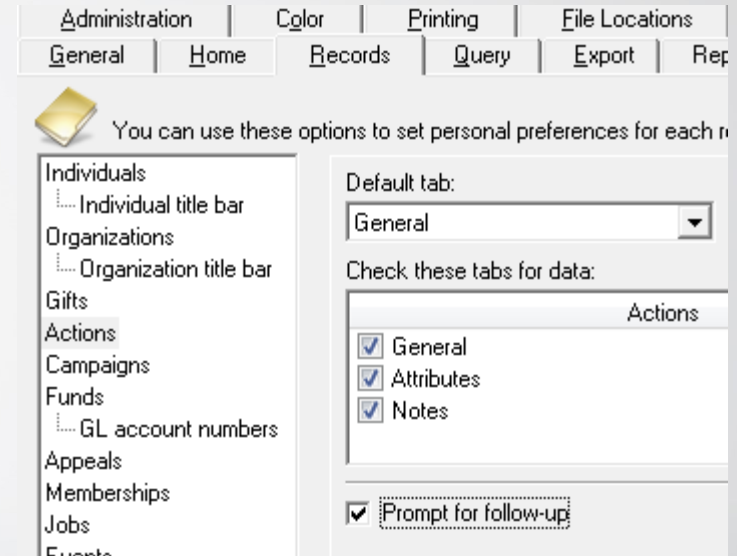
# Using Raiser's Edge: Solicitation

- When cultivation is complete, change status to Solicitation
- Make the Ask
  - Yes:
    - Update Action to Complete
    - Continue to stewardship stage
  - Maybe:
    - Update status (Negotiation)
    - Add necessary actions
      - Action Track for “maybes”
  - No:
    - Update Action
    - Change Status (Dropped)



# Using Raiser's Edge: Stewardship

- Establish additional tracks for stewardship
  - Re-use the same concepts for ongoing tracks
  - Build assignments and notifications
- Mark “Prompt for follow-up”
  - User option is configurable for staff
  - Automatically prompts the staff member to schedule the next call or meeting when finishing one



The screenshot shows the 'Administration' tab in the Raiser's Edge software. The 'General' sub-tab is selected. On the left is a tree view of the system's data structure, including 'Individuals', 'Organizations', 'Gifts', 'Actions', 'Campaigns', 'Funds', 'Appeals', 'Memberships', 'Jobs', and 'Events'. The 'Actions' item is highlighted. On the right, the 'Default tab:' dropdown is set to 'General'. Below it, the 'Check these tabs for data:' section has checkboxes for 'General', 'Attributes', and 'Notes', all of which are checked. At the bottom, the 'Prompt for follow-up' checkbox is also checked.

Administration	Color	Printing	File Locations
General	Home	Records	Query
Export	Rep		

You can use these options to set personal preferences for each r

Individuals  
... Individual title bar  
Organizations  
... Organization title bar  
Gifts  
Actions  
Campaigns  
Funds  
... GL account numbers  
Appeals  
Memberships  
Jobs  
Events

Default tab:  
General

Check these tabs for data:

Actions
<input checked="" type="checkbox"/> General
<input checked="" type="checkbox"/> Attributes
<input checked="" type="checkbox"/> Notes

☒ Prompt for follow-up



