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

Speakers:

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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!
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**

<table>
<thead>
<tr>
<th></th>
<th>AF 2012</th>
<th>AF 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue</td>
<td>$379,000</td>
<td>$785,000</td>
</tr>
<tr>
<td>Gifts</td>
<td>373</td>
<td>690</td>
</tr>
<tr>
<td>Average Gift</td>
<td>$1017</td>
<td>$1138</td>
</tr>
<tr>
<td>Response Rate</td>
<td>1.8%</td>
<td>2.8%</td>
</tr>
</tbody>
</table>
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:

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

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

Donor Centric

Team Focus

No Turf Issues
It's QUESTION TIME!!
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!

<table>
<thead>
<tr>
<th>Data</th>
<th>Raiser’s Edge Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Family/Friend info</td>
<td>Individual Relationship</td>
</tr>
<tr>
<td>Work history, religious/community involvement</td>
<td>Organization Relationship</td>
</tr>
<tr>
<td>Education History</td>
<td>Education Relationship</td>
</tr>
<tr>
<td>Wealth/Giving info, ratings, status</td>
<td>Prospect Tab</td>
</tr>
<tr>
<td>Prospect Status</td>
<td>Attribute or Prospect Tab</td>
</tr>
<tr>
<td>Gifts to other organizations</td>
<td>Prospect tab</td>
</tr>
</tbody>
</table>
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
It's QUESTION TIME!!