Arts Industry Practices for Moves Management

Participant Overview: Donor Tiers & Budget Sizes*

Organization	Members / Broad Base Donors	Major Donors	Budget Size
Museum 1	$75-1499	$1500+	$41.9 million
Museum 2	$1-2499	$2500+	$49.2 million
Museum 3	$70-2499	$2500+	$91.0 million
Museum 4	$83-1199	$1200+	$4.9 million**
Symphony 1	$1-2999	$3000+	$27.4 million
Symphony 2	$1-2999	$3000+	$34.0 million

**2019 IRS 990 information was used to align without potential differences due to COVID impact*
***Part of a larger arts & culture campus with a budget of $107.1 million, which contributes to fundraising for its three arts partner institutions*

Participant Overview: Donor Team Structures & Portfolio Sizes

Organization	Team Structure	Portfolio Size per Officer
Museum 1	Deputy Director of External Affairs Associate Director of Development 3 – individual giving 2 – membership and annual giving 2 – data operations 5 – restricted giving (corporate, government, campaigns) 2 – special events 2 – desk assistance **18 total** **note – development sits in external affairs department along with marketing & communications*	150-200 per gift officer
Museum 2	Chief Advancement Officer 5 – gift officers	150-200 per gift officer

	3 – corporate/foundations 2 – events 4 – annual giving **15 total**	
Museum 3	Chief Development Officer 7 – gift officers across: • Corporate/foundations • Planned giving • Annual giving • Major gifts 7 – support staff across same areas 6 – data operations 5 – events **26 total**	Maximum 150 per gift officer
Museum 4	Director of Development AD of Individual Giving Individual Giving Officer Directors Circle Officer ($12.5K+) Development Coordinator **5 total**	*Not received*
Symphony 1	VP of Development 6 – individual giving 2 – corporate/foundations 2 – data operations **11 total**	*Not received*
Symphony 2	VP of Development 5 – individual giving 2 – corporate/foundations 2 – data operations 2 – events 1 – board liaison **13 total**	*Not received*

Meeting Details

Below you will find a breakdown of the various elements of moves management processes we heard across our calls, organized on spectrums of frequency and structure where applicable.

Meeting Structure & Cadence

By frequency

Meeting Leader	Meeting Participants	Length & Cadence	Donors Discussed
Head of Major & Planned Gifts	Individual giving officers attend all meetings; corporate team attends once a month to talk about larger initiatives *Total: 5-8 people*	On a weekly basis	All donor officer portfolios
Director of Individual Giving	Individual giving officers attend all meetings; institutional giving team attends 50% of meetings *Total: 6-8 people*	45 mins on average (depending on time of year can be longer or shorter), on a weekly basis	Major donors, broad base donors with potential to become major donors
VP of Development	All individual and institutional giving officers *Total: 9 people*	1 hour, on a weekly basis	All donor officer portfolios
Director of Development	Full individual giving team *Total: 5 people*	On a biweekly basis	Only major donors
Prospect Development Officer	Gift officers across all areas, including	On a monthly basis	Only major donors

	corporate and foundation giving *Total: 8 people*		
Associate Director of Development + Prospect Researcher	Annual (membership, individual) and restricted (corporate, grants, campaigns) officers *Total: 12 people*	1.5 hours, on a monthly basis	Major donors and annual fund donors above $1000

Descriptions of Meetings

By level of formality/structure

- Fairly informal weekly meeting with the major and planned giving team.

- Every other week the full individual giving team holds an informal meeting with the Director of Development to discuss board involvement, sharing names, and expanding the network of potential donors. Aside from this, the individual giving officer meets monthly with the Associate Director of Individual Giving. They pull the renewal list and look at who will get a renewal letter versus who will be asked to move up to top giving tier with a special letter.

- While there is a weekly team meeting, the more robust check-in is during the weekly one-on-ones. The VP of Development sits down with each individual and together they review the officer's portfolio, talk about timing of when asks will be made, and discuss next steps for each of the different people in the portfolio.

- During their meetings, the team talks about how we're progressing against monthly benchmark goals for pledges and revenue, plus what are upcoming opportunities for engaging donors (events, concerts, etc); they dive into unique challenges with individual relationships; then at key inflection points (leading up to start of season, tax/holiday time, close of fiscal year) they go line by line in those meetings with each fundraiser.

- The prospect researcher presents on people who join at the $1500 level or above. The team goes around and says who is particularly interested in meeting them based on a short bio, and that person takes them into their portfolio. Then they look through lower-level members and mark anyone with high potential as an Individual Giving Prospect.

- In their monthly meeting, the full development team meets to discuss an agenda based on activity reports pulled from Tessitura. There are two standard items of discussion: clearance of all prospects submitted to be solicited for something they are not normally giving and one project-specific item (such as an upcoming exhibition or education program that requires additional fundraising).

Accountability

By level of formality/structure

Fundraiser Accountability	Philosophy
Each donor officer must come to the meeting with **a story of a donor interaction** that was particularly meaningful or an example of moving a donor forward.	*Not disclosed*
Moves management meetings are **more informal brainstorming sessions**, and so have less to concretely prepare. For 1:1 meetings with the AD of individual giving, the officer brings their renewal list report.	Success is measured both quantitatively (i.e., dollars raised) and qualitatively (i.e., credibility built with donors).
Each fundraiser is **responsible for their own pipelining of prospects**, submitting prospects for clearance. They also must have a 1:1 meeting with the Deputy CDO to look at their portfolio and do some analysis together.	The goal is to help each fundraiser figure out how to move their prospects and donors along – there are no strict rules on number of days without movement that causes a fundraiser to lose that donor.
Fundraisers are responsible for **planning which donors they will try to renew and increase**, and then for reporting progress against those goals. They also should identify and share at meetings which donors may not renew/increase.	Accountability is around "did you do the right things with the donors," not "did you get the right dollar amount."
For each donor, an officer has **clear goals for the following**: • Planned giving • Proposals • Dollar amount	The Head of Major and Planned Giving comes from a university background, which was highly metrics-focused. She has worked to introduce a similar mindset at the museum.

Data & Reporting

There were several common sets of data that most organizations bring to moves management meetings, which include:

- Wealth screens
- Activity reports (often pulled from CRM)
- Ready-to-ask pipeline

Some organizations, though, had some more unique reports that they pull for their moves management process:

- At the start of the fiscal year, one team does a portfolio review in Excel along with the upcoming year's strategy, goals, and current stages for each individual.
- Given the high focus on clearances during one organization's meeting, they have built a custom report in Tessitura that pulls all prospects proposed by fundraisers for a new or different ask.
- The Director of Data Operations attends all moves management meetings at one institution, and creates a graphical report that shows progress on a monthly basis. 3 bars for every month: current goal, current actual, and end of same month last year.

CRM Usage

<table>
<tr><th>System Used</th><th>Accountability for Updating</th></tr>
<tr><td>Raiser's Edge (1 organization)</td><td>Gift officers are responsible for putting information into the CRM, unless it pertains to a campaign – in that case, notes go to the campaigns team in an email and they manage and tag it in specific ways for reporting purposes.</td></tr>
<tr><td>Salesforce (1 organization)</td><td>Salesforce has been a challenge to implement and much of the data management happens outside of the system — gift officers keep information in an Excel spreadsheet.</td></tr>
<tr><td rowspan="4">Tessitura (4 organizations)</td><td>Gift officers are expected to input all information into Tessitura in a specific, uniform format.</td></tr>
<tr><td>Gift officers are responsible for updating all of their portfolio data.</td></tr>
<tr><td>Gift officers are responsible for updating their portfolios in Tessitura; the VP of Development does a monthly audit to ensure officers are doing so.</td></tr>
<tr><td>Gift officers are responsible for updating their portfolios in Tessitura, and the Director of Data Ops holds them accountable to doing so.</td></tr>
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Moves Management Stages in CRM

Two organizations use their CRM to track specific moves management stages, organized as follows:

- Proposed > Cultivation > Stewardship > Ready To Ask > Closing
- Identified > Qualified > Dropped > Cultivation > Solicitation > Verbal > Funded > Stewardship

Further Advice & Key Takeaways

- The development team at one organization tries to give every donor a thank you call — even at the lowest levels (though team members are not penalized if they do not have time to do so). Sometimes these conversations can uncover information the team could never gather otherwise.
- While moves management processes are not necessarily popular with fundraisers, most if not all understand its importance for a successful development team.
- Tessitura appears to have the highest satisfaction among the development professionals with whom we spoke. Salesforce was a bit more challenging to work with.
- One organization previously had a formal moves management meeting to discuss donors in their top giving tier and how to increase their giving but found it to be challenging to conduct this in a group setting. They have since moved these more tactical conversations to a one-on-one format.