

Consistent Fundraiser Management:

Leading Fundraisers in a
Moves Management
Major Gift Program at CU



Objectives:

- **Understand core values and principles** of a fundraising leader at CU
- **Identify what fundraisers need** from their managers
- **Identify consistent topics and data points**, under the fundraiser's control, that you can use to lead them
- **Implement consistent meeting practices** to help your fundraisers develop



Core Values/Principles of Fundraising Leaders

- Leadership and management go hand-in-hand
- Fundraisers want to feel they are a part of something important, something larger than themselves
- No difference exists between what is good business practice and what is humane—they are one and the same
- If our fundraisers feel valued, they will give the full scope of their talents
- Good managers are consistent, accessible and engaging in constant dialogue
- Interactive leadership/management builds trust, and benefit of the doubt
- Don't just assign tasks, also define purpose
- Address problems as they arise
- Maximize productivity but also nurture skills, develop talent and inspire
- Keep an eye both on the bottom line and on the horizon
- Ask good questions—teach, coach, encourage and probe underlying assumptions



Focus on Major Gifts

- Overriding focus of “Moves Management” is on the major gift market space
- Success in this market requires coherent, systematic and measurable business practices
- Consistently managing toward established industry best practices will help everyone expand their capabilities and achieve goals



What CU Fundraisers Need From Managers

Fundraisers need consistency more than anything else—consistency establishes what is important

- Consistency of meeting frequency (monthly)
- Consistency in the format and content of the meetings
- Consistency in the topics to be covered at every meeting
- Consistency in the data used to drive the discussions

The purpose of monthly management meetings should always be major gift portfolio management



Portfolio Management through Leading Indicators

Manage toward the variables the fundraiser can control:

- Formulation of a strong, qualified prospect portfolio
- Scheduled formal donor prospect visits
- Strategic and timely documentation of visits and other donor-related activity in the database
- Disciplined maintenance of dated “moves” or “next steps” so that donor prospects are moving steadily along the relationship continuum
- Consistent proposal flow as relationships mature to a point where solicitations can comfortably occur (not forced or premature)
- Adherence to coordination protocols and policies
- Rigorously discuss hows and whats questioning, tenaciously following through and ensuring accountability



Subjective Qualities to Observe in Meetings

Is the fundraiser...

- Confident, motivated, and well-spoken?
- Knowledgeable and able to credibly articulate of the value of CU and his or her unit?
- In possession of good chemistry with academic partners?
- Intuitively aware of when to bring academic partners into the cultivation process?
- Sufficiently skilled at executing artful and respectful strategies for each prospect and overall portfolio?
- Able to negotiate the closure of large, complex gift arrangements?
- Many more!



Standard Meeting Materials

- Prospect stage-detail report
- Managed-prospect summary report
- Dashboard report
- Contact reports



Subtleties of Management Meetings

- Meetings are where you demonstrate strong core values and principles
- Meetings should be comfortable opportunities for coaching and teaching, not punishing or exposing
- Meetings should be highly interactive, energetic, engaging and creative
- Metrics alone are not enough – it's the conversation behind the metrics
- Done well, fundraisers will look forward to the meeting as opportunities for professional growth



Summary

- Meet monthly
- Repeat the same format every month
- Manage toward the controllable variables—leading indicators
- Consistency is everything

