



United States Youth Soccer

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# FUNDING YOUR ORGANIZATION THROUGH RELATIONSHIPS

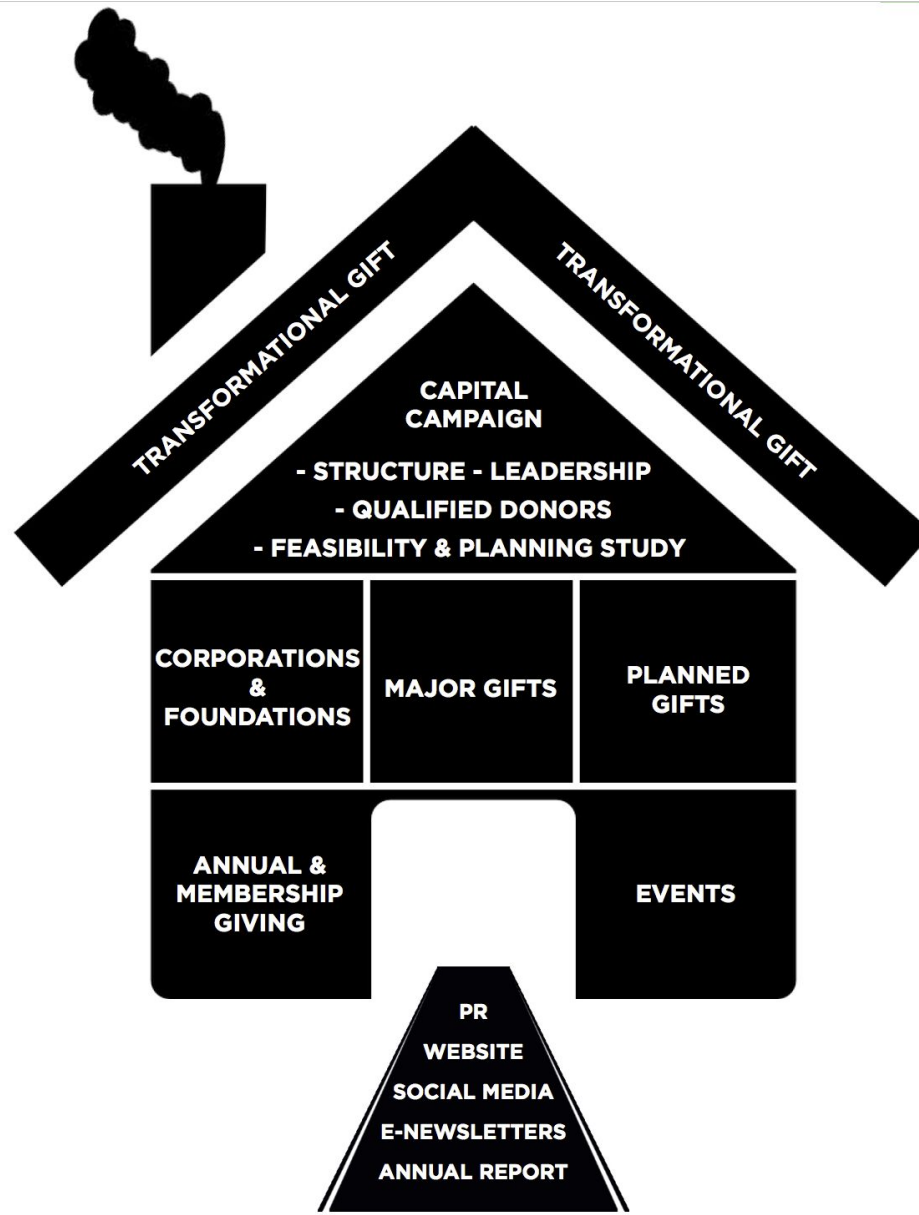
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# FUNDING YOUR ORGANIZATION THROUGH RELATIONSHIPS

- 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



# FUNDING YOUR ORGANIZATION THROUGH RELATIONSHIPS

## 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

# FUNDING YOUR ORGANIZATION THROUGH RELATIONSHIPS

## 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!



# FUNDING YOUR ORGANIZATION THROUGH RELATIONSHIPS

## 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

# FUNDING YOUR ORGANIZATION THROUGH RELATIONSHIPS

- Success is Based on the
  - Quality
  - Frequency
  - Continuity
- Of the Moves.

# FUNDING YOUR ORGANIZATION THROUGH RELATIONSHIPS

- 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





# FUNDING YOUR ORGANIZATION THROUGH RELATIONSHIPS

- 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.

# FUNDING YOUR ORGANIZATION THROUGH RELATIONSHIPS

- 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

# FUNDING YOUR ORGANIZATION THROUGH RELATIONSHIPS

- 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



# FUNDING YOUR ORGANIZATION THROUGH RELATIONSHIPS

## IMPLEMENTATION

- Smaller operations
  - Seek commitments from all stakeholders of relevance
  - Start slowly with a small number
  - Be disciplined
  - Evaluate regularly

# FUNDING YOUR ORGANIZATION THROUGH RELATIONSHIPS

- 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

# FUNDING YOUR ORGANIZATION THROUGH RELATIONSHIPS

- Providing Guidelines
  - Set dollar goals
  - Determine number of solicitations
  - Guidelines for meaningful contacts monthly
  - Regular staff assessments – what is working?

# FUNDING YOUR ORGANIZATION THROUGH RELATIONSHIPS

- 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?

# FUNDING YOUR ORGANIZATION THROUGH RELATIONSHIPS

## 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



# FUNDING YOUR ORGANIZATION THROUGH RELATIONSHIPS

## Review and Analysis

- Disciplined Systems and Process
- Consistent Planning and Evaluation
- Moves, Managers, Primaries, Secondaries
- Infrastructure and Tracking