

Zen and the Art of Moves Management

A Fundraiser's Perspective on the Metaphysics of Quality

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“Quality ... you know what it is, yet you don't know what it is. But that's self-contradictory. But some things are better than others, that is, they have more quality. But when you try to say what the quality is, apart from the things that have it, it all goes poof! There's nothing to talk about. But if you can't say what Quality is, how do you know what it is, or how do you know that it even exists? If no one knows what it is, then for all practical purposes it doesn't exist at all. But for all practical purposes it really does exist. What else are the grades based on? Why else would people pay fortunes for some things and throw others in the trash pile? Obviously some things are better than others ... but what's the betterness? ... So round and round you go, spinning mental wheels and nowhere finding anyplace to get traction. What the hell is Quality? What is it?”

— Robert M. Pirsig, **Zen and the Art of Motorcycle Maintenance: An Inquiry Into Values**

“Moves Management, developed by G.T. “Buck” Smith and David Dunlop at Cornell University, is a process of relationship management that specifically cultivates major gifts. This process spans Prospect identification and research through involvement, solicitation, and stewardship. As David Dunlop described it, “The Moves concept focuses major gift fund raising on changing people's attitudes so they want to give. To do this, we take a series of initiatives or Moves to develop each Prospect's awareness of, knowledge of, interest in, involvement with, and commitment to the institution and its mission.”

— Wikipedia

Quality VS Quantity

Moves Management offers an intentional way to build a relationship with a new charitable donor. When practiced successfully, it requires a commitment to the quality of each relationship.

Unfortunately, in the years since its inception, Moves Management has often been distorted or simplified by many fundraising managers to focus on counting Contacts with potential donors – counting as Moves a behind the scenes tour of your facility, an invitation to a special event, lunch or dinner with the CEO, or an invitation to give feedback on the strategic plan.

One sad result is that those fundraising professionals charged with implementing and tracking Moves with those in their portfolios trend toward keeping track of their number of Contacts at the expense of the quality of those Contacts. They count phone calls, emails, and meetings with diminishing regard to whether anything significant took place during those Contacts. They become more concerned with quantity than with quality.

This invites a close examination of the value of quality. Let's take a look at a fascinating source of the measurement of quality, of what I believe to be the key to a successful model of Moves Management.

The Metaphysics of Quality

The Metaphysics of Quality (MoQ) is a theory of reality introduced in Robert Pirsig's philosophical novel, **Zen and the Art of Motorcycle Maintenance** (1974) and expanded in **Lila: An Inquiry into Morals** (1991). Through these books Pirsig explores what exactly is meant by the word “quality,” and how it might be quantified in beneficial ways.

"Good is a noun. That was it . . . That was the homer, over the fence, that ended the ball game. Good as a noun rather than as an adjective is all the Metaphysics of Quality is about. Of course, the ultimate Quality isn't a noun or an adjective or anything else definable, but if you had to reduce the whole Metaphysics of Quality to a single sentence, that would be it."

“Between the subject and the object lies the value.”

- Robert M. Pirsig, **Lila. An inquiry into morals**

The fundraiser’s translation – between quantity and quality lies the value, the “good.” See, it IS a noun.

The relative question for the fundraiser is this – How good is my work? How do I KNOW that? Can I measure it? Can I learn from it in a way that helps me make my “good” better?

This is where Moves Management intersects with the Metaphysics of Quality. We CAN measure our “good.” Far more important, we SHOULD measure our “good.”

I’m not going to attempt an in-depth examination of the Metaphysics of Quality. For that you should read Pirsig. I only want to refer to it to make my point that quality can be measured, quantified. In fact, doing so enhances your pursuit of meaningful donor relationship building.

Quality, especially quality as addressed in activities like building relationships, is dynamic and fluid. Sometimes our efforts yield poor results; other times we nail it. The variety of our efforts and results challenges us to hold them up for measure, to consider what quality might look like if we can quantify it.

What might be the value of measuring such quality?

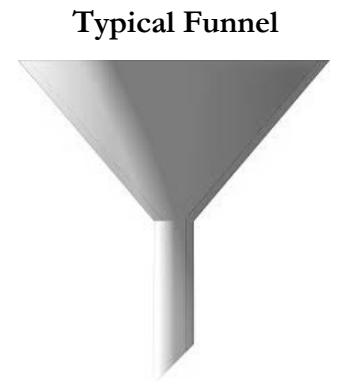
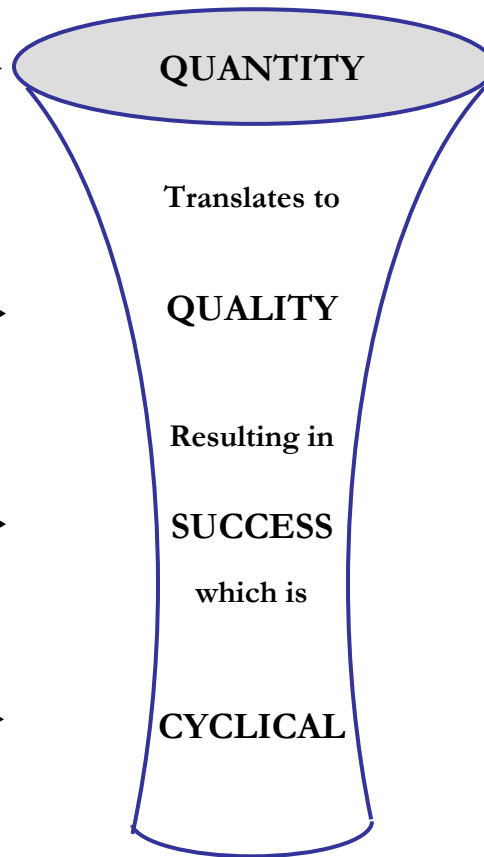
Picture a relationships funnel, into which you pour all your possible donors. It’s a given that pouring more constituents into the big end of the funnel is likely to yield more donors at the small end. But what should happen with each person once in the funnel? How small must the exit end be? With intentionality and quality added to the process, the mouth from which donors emerge can be enlarged, making your work much more effective.

“When you want to hurry something, that means you no longer care about it and want to get on to other things.”

— Robert M. Pirsig, **Zen and the Art of Motorcycle Maintenance: An Inquiry Into Values**

The Development Cycle

- ID/Discovery/Assessment** →
Carefully choose which suspects to assess; refer to rating systems and research to ensure quality control.
- Cultivation** →
Only Move a suspect into Cultivation once your definition is met.
- Solicitation** →
Solicit once confident of favorable consideration by the prospect. Prior planning will help your success rate.
- Stewardship** →
Make a proactive plan to recycle the donor to assessment for the next gift.



Your goal is to make the bottom end of this funnel as large as you can by planning your Moves for each relationship. The key to your success will be quantifying each Move – planned and executed - according to stated criteria from your prospect management system. The slight flare at the bottom of the funnel reminds you that some donors may be re-cycled from Stewardship back into Assessment for their next gifts.

A familiar analogy made with fundraising is that of the sales world, in which the 10:3:1 rule of thumb states that the salesperson will convert calls on ten Suspects into three prospective buyers, and that one of those three will actually make a purchase. That's a 10% success rate and is considered successful in the sales world.

Applying basic concepts from the metaphysics of quality can double, even triple this standard for fundraising professionals. What's more, fundraisers rarely make true cold calls. Most of those we identify as possible donors already have some relationship to our organizations.

Pirsig points out that everything possesses quality. Some things possess good quality; some possess poor quality. Some things are done better than other things. And that gets to the point of measuring the quality – the good – of those activities we fundraisers want to acknowledge as Moves, and how you can improve your Suspect:Prospect:Donor ratio. It gets to the heart of my contention that, despite the fundraiser's intention with every Contact she makes with a new possible donor, not every Contact possesses equal quality. Not every Contact

is valuable enough to be quantified as a Move. A focus on making initial calls, with no values-driven approach to how to lead those Suspects through the Development Cycle, will yield a low success rate.

The key to quantitative measure is defining the unit of measure. Let's use what we commonly refer to as the Development Cycle, or the Fundraising Cycle, which cites several stages of relationship development. Those typically include the stages/steps listed in the table below. You might use a different system, different nomenclature, as the three examples indicated in the table. Regardless of what syntax, what steps & stages you refer to, it is critical to define what each means and how you will quantify it.

The Development Cycle	Five Steps of Engagement	Seven Stages of Gift Planning
Identification	Examine	Identify
Assessment/Discovery	Inform	Approach
Cultivation	Involve	Gather
Solicitation	Invite	Analyze
Stewardship	Steward	Develop a Plan
		Implement the Plan
		Stewardship

Focusing on the most familiar Development Cycle model (left column), it is critical to define just what Identification means, what constitutes Discovery or Assessment (are they distinct or merely synonyms?), what should be required to declare the new Prospect is now in Cultivation, what must be accomplished in order to claim the Prospect has in fact been Solicited.

The Language of the Development Cycle

Two words familiar to those who use the Development Cycle to track their relationships are too often confused with one another, I believe largely through a lack of managerial forethought about the quality of each word and how each might be quantified.

Far too many fundraisers and their managers confuse Contacts with Moves. Few distinguish between the two, accepting almost any activity with a possible donor as a Contact, and leaving the definition of a Move open to broad interpretation. This leads fundraisers to practice a low-quality approach to relationship-building.

Here are my own definitions.

- **Contact:** a communication with a possible donor that includes some identifiable discussion intended to further a giving relationship.
- **Move:** a Contact that results in changing the stage of the Development Cycle for that possible donor.

I also distinguish between a Suspect (one I suspect/hope of having major gift potential) and a Prospect (one I have Moved into Cultivation and whose gift potential has now been quantified)

Examining Contacts – the Good, the Bad, the Insignificant

When a conversation includes a discussion of why the Suspect is interested in your organization you add value to that meeting and can comfortably claim it as a Contact. When you pursue a conversation about for what the

Suspect might consider a gift you enhance the good in your work. The Prospects who engage with you in an exploration of how they might be able to make a meaningful gift adds quality to that conversation – a worthwhile Contact.

In addition to those Contacts that specifically include gift discussion (why the person is interested in your organization, for what she might consider a gift, how such a gift might be made, will he?), there are also all the other indirect Contacts required to develop relationships. These include letters, notes, telephone calls, e-mails, and what we call social sightings. All have some value, but they do not all possess equal quality and, therefore, should not be counted equally.

Chatting with someone, even one of your assigned Prospects, at intermission of a performance, should be considered a social sighting UNLESS the pursuit of a gift is included in the conversation. Meeting someone for lunch in the gallery cafe is not a Contact unless charitable giving is somehow included in the lunch conversation.

Yes, some un-countable activities are necessary to create a legitimate Contact. A lengthy telephone conversation might result in scheduling a meeting to discuss items agreed to during the telephone conversation. But did the conversation actually take place during the phone call? The note you write after a meeting is part of that meeting, not a separate Contact. The telephone call that secured the meeting is not the meeting -- not yet the Contact.

Such interactions are valuable to relationship-building but, if they don't directly involve gift discussion, they should not count as Contacts toward your performance metrics. Deciding what to count as a legitimate Contact is often a judgment call, and only you know the true good of the communication. And it's YOUR good we're talking about.

There are exceptions, as is the case in most activities. Successfully recruiting a new Suspect to serve on a volunteer committee might count as a legitimate Contact, since you can be confident you will discuss meaningful information during the committee's work. Hosting a Prospect on a site visit to meet staff and see the programs you hope to interest him in gives you an opportunity to introduce gift-related conversation, whether directly or indirectly. But those exceptions clearly are related to growing those relationships by intentionally connecting people to your mission and programs.

These are not requirements or rules, only standards I encourage you to embrace to raise the bar on the quality of your performance. If you choose to pad your Contacts count with lower quality activities you will only lower the quality of your own work.

And that takes us to the transition from quantity to quality. High quality communications can legitimately count as Contacts, but are they Moves?

Examining Moves – Quantity is never a good substitute for Quality

What's crucial to the pursuit of good quality is to distinguish a Move from a Contact, and to define each Move through the stages of the Development Cycle, to set your own standard, ideally to supplement your organization's official definitions.

What should be required to Move someone from the large constituent pool into Identification as a possible major donor? Might it require an initial communication (ideally in person) during which some mention is made of

philanthropy, even in a low-key fashion? You might consider this specific Contact the Discovery meeting, after which you determine whether to further investigate the person's motivation and means to give and Move him into Assessment for further Contacts.

Your criteria for this Move may be the single most valuable choice you make, to lay the foundation on which each hopeful donor relationship will be built. Consider this – if you mentioned your hope to discuss a gift at some time, or introduced yourself as a fundraiser for your organization, and the new Suspect agreed to continue the relationship, you have a strong indication of some level of interest and willingness to invest in the relationship. In other words, if you can identify and schedule a next step, you might Move this person into Assessment and explore what that gift relationship might look like. If not, let go and look for new Suspects to pour into your funnel.

As your pursuit of quality improves you'll notice more high-quality Suspects entering the top of your funnel. This is because you're now working with purpose. The higher the quality of those you select to start donor relationships, the higher will be the quality of your results. It really is that simple.

What should define a Move from Assessment into Cultivation? For me it's the answer to a simple question – for what is the new Prospect being Cultivated? The fundraiser should be able to identify either the motivation to give (a likely gift designation) or the means to give (a dollar amount or range) before upgrading someone to Prospect status and Moving her into Cultivation.

Test this definition with your manager; ask for his/her definition of "cultivation." This is one of those places in your self-management where you can enhance or supercede your organizational definition and insert your own definition of quality into your work.

The same concept applies when Moving the Prospect into Solicitation. There should be a clear definition of what in your office defines a proposal, what counts as a Solicitation, before this Move may be counted. Has the planned giving director who submits an illustration for a charitable remainder trust asked for a gift, or merely provided educational information? Is a printed menu of giving opportunities and naming amounts anything more than information?

Stewardship can be a trap you set for yourself when you make no intentional effort to continue inserting good quality into the relationship. There is danger in keeping a new donor in Stewardship for too long without creating a plan to Move that donor back into Assessment for the next gift. What good would that do you?

Every Move requires a Contact, but not every Contact is a Move

I often have several meaningful Contacts during Assessment but I only count a Move after the Contact that caused me to change the status from Assessment to Cultivation. I can do this because I already have a clear definition of Cultivation and will assign this Move only once the relationship qualifies for it.

I may have several Cultivation Contacts to discuss and negotiate the gift plan before the one where I ask for the gift and Move the Prospect into Solicitation.

Only once the gift commitment is made, often after several more Contacts to complete documentation, will I record the gift commitment and Move the new Donor into Stewardship.

If I secured a five year pledge, I want to make plans to actively steward that donor through the pledge period, in part to ensure the donor honors the pledge, but also – and far more important – to design a plan to invite a new gift

discussion sometime toward the end of the pledge period. All those Stewardship Contacts are vital but, until I complete the one that allows me to Move the donor back into Assessment, they are only Contacts.

I typically count a significant number of Contacts during a successful gift pursuit but only two-four Moves, but I recognize that the Contacts that resulted in those key Moves are the ones that made the difference for me. Therein lies the intentional pursuit of quality over quantity. What matters is the quality of each Contact, to help me Move each potential donor through the Development Cycle.

The focus here is clearly on intentional activity, on repetitively doing meaningful, measurable things. My proposal -- start with quality, with Moves, then focus on quantity, on Contacts. Work with each new Suspect with the goal of Moving him through the Development Cycle. Do well those things you choose to do, then do them again, over and over.

Which of these Contacts might be qualified as Moves? (My opinions are noted at the end of the paper.)

- You call a constituent with a high gift capacity rating to meet with you
- You meet with that person and he agrees to begin a conversation with you about giving
- During a meeting with a Suspect you learn that she is interested in a specific program
- During your follow up meeting you introduce her to the program director
- You invite a Suspect for a site visit
- You receive an email from a prospect announcing the successful sale of the family business
- That same email includes a request for information about a \$50,000 life income gift
- You send an illustration for a life income gift in response to an inquiry
- Your prospect agrees to review a proposal for a gift
- You visit to present that proposal
- You chat with one of your major donors at the annual lifetime giving celebration
- You call a donor to thank him for his three year pledge.
- You call a donor to ask for a meeting to report on the good work accomplished due to his three year pledge
- You ask that donor to start a new gift conversation with you, to continue the work his gifts have supported

“I like the word ‘gumption’ because it’s so homely and so forlorn and so out of style it looks as if it needs a friend and isn’t likely to reject anyone who comes along. I like it also because it describes exactly what happens to someone who connects with Quality. He gets filled with gumption. A person filled with gumption doesn’t sit around dissipating and stewing about things. He’s at the front of the train of his own awareness, watching to see what’s up the track and meeting it when it comes. That’s gumption. If you’re going to repair a motorcycle, an adequate supply of gumption is the first and most important tool. If you haven’t got that you might as well gather up all the other tools and put them away, because they won’t do you any good.”

— Robert M. Pirsig, **Zen and the Art of Motorcycle Maintenance: An Inquiry Into Values**

Know How You're Doing

Understanding the concepts and philosophy behind this quality-driven approach to relationship management isn't sufficient, nor is deciding to embrace some of the definitions and practices offered here. You must intentionally track your activities and their quality in order to truly know how well you're doing.

The table below represents one way of keeping track of your performance standards; it's a tool to help you analyze and reflect on how good a job you're doing on a regular basis. Maintaining your own monthly benchmarks summary will give you a reason to regularly reflect on the true value of your good intentions and to make the improvements necessary to your continued growth.

NOTES **1** on how you might use this model are provided at the end of the table.

Performance Benchmarks Monthly/Annual Summary

Contacts 1	Contacts	Moves 2	Moves
MONTH ENDING _____	YEAR TO DATE	MONTH ENDING _____	YEAR TO DATE
Countable Contacts ___# in Assessment	Countable Contacts ___# in Assessment	Countable Moves ___# into Assessment	Portfolio Distribution 3 ___% in Assessment
___# in Cultivation	___# in Cultivation	___# into Cultivation	___% in Cultivation
___# in Solicitation	___# in Solicitation	___# into Solicitation	___% in Solicitation
___# in Stewardship	___# in Stewardship	___# into Stewardship	___% in Stewardship
___# TTL CONTACTS	___# TTL CONTACTS	___# TTL MOVES	___# TTL MOVES
___# Proposals Submitted	___# Proposals Submitted		
___# Gifts Completed	___% Closure Rate 4		

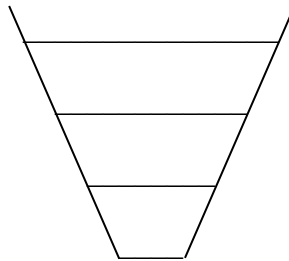
NOTES **1** on Summary

General: Your records for the first year on the job will become your baseline statistics, from which you can grow in future years.

1. Counting your legitimate Contacts regularly accomplishes several things:
 - a. It creates a regular reminder to actively practice, to generate meaningful activity
 - b. It offers a statistical summary of the value of your activity. If you're more than a year on your job and are regularly recording a small number of Solicitation Contacts, you can be confident that your efforts in moving Prospects into that stage of the Development Cycle -- your asking skills -- need some attention.
2. In order to track Moves you must decide on your definition of a Move.

- Tracking portfolio distribution and comparing it to the philosophy of the Development Cycle Funnel (see page 3) will help you visualize the quality of your work. A too-high percentage of Suspects in Assessment may indicate too much focus on early-stage relationship building. A relatively small percentage in Cultivation suggests poor quality in Moving Suspects into that stage and gives you a reason to examine your processes. A poor Cultivation: Solicitation ratio (I suggest anything higher than 3:1) invites you to look closely at your preparations for soliciting gifts. An ideal distribution might be in this range. Note how it resembles the shape of the Development Cycle Funnel, with only a gradual narrowing of the passage from Identification/Discovery to gift completion. Commit to tracking your statistics for a year; use this as your baseline to set year-two goals. Continue to grow and evolve.

40% in Assessment
 30% in Cultivation
 20% in Solicitation
 10% in Stewardship



- Closure rate is calculated as the percentage of Solicited Prospects who said YES. A fundraiser in her second year should aspire to a closure rate of at least 30%, and the goal (and results) should rise with more experience. Closure rate is the most telling statistic; it speaks to the overall quality of your work. You must succeed at engaging with constituents, at converting them to legitimate Suspects, at qualifying them as Prospects in Cultivation, and finally at Soliciting them successfully in order to achieve a high closure rate. This, simply put, is how you define “good” as a noun.

“Is it hard? Not if you have the right attitudes. It’s having the right attitudes that’s hard.”
 — Robert M. Pirsig, **Zen and the Art of Motorcycle Maintenance: An Inquiry Into Values**

I first read **Zen and the Art of Motorcycle Maintenance** in the mid-1970s, several years before I began my career as a fundraising professional. I have since re-read the book several times, and have been grateful for each new experience. As Pirsig likes to point out, it’s all about the journey, and no two trips on the same road are ever identical.

Maintaining focus on what’s important in our work can be challenging; our days are full of distractions and temptations. But I have always found, on those occasions when I gave myself time to reflect, that it was easy to get back to the purpose of the work. We’re road warriors on relationships journeys, and our motorcycles deserve all the care and attention we can give them.

You might say the motorcycle is the nonprofit you serve, those passengers you invite to ride with you are your future donors, and the road the Development Cycle. We fundraisers have the privilege of planning the trips and sharing the seat with our various passengers. The ride can be bumpy or smooth, short or extended, straight or circuitous, and how you value the journey will have much to do with your experience. Check your tires, fill the gas

tank, pack your tools and maps, put on your helmet, and enjoy the ride. Or, as Pirsig would probably suggest, you might make another analogy entirely.

From page 7:

Which of these Contacts might be qualified as Moves?

What will your standards of performance be? How will you choose to measure the quality of your work?

- You call a constituent with a high gift capacity rating to meet with you – nothing YET. (The meeting will be your first Contact, during which you will either disqualify or further qualify the constituent.)
- You meet with that person and he agrees to begin a conversation with you about giving – Move into Identification (The Suspect has agreed to deepen the relationship and you now work to assess gift motivation and means)
- During a meeting with a Suspect you learn that she has volunteered for a specific program – Contact (This is informative – valuable, but not yet quantifiable progress on giving)
- During your follow up meeting you introduce her to the program director – Contact (nothing specific about her support of the program has yet been discussed)
- You invite a Suspect for a site visit – Contact (nothing measurable has happened – yet)
- You receive an email from a Prospect announcing the successful sale of the family business – Contact (good to know, but no measurable progress made)
- That same email includes a request for information about a \$50,000 life income gift – Move into Cultivation (You have qualified a possible gift range)
- You send an illustration for a life income gift in response to an inquiry – Contact (encouraging, but you're only providing information; you haven't Solicited a gift yet)
- Your Prospect agrees to review a proposal for a gift – Contact (the proposal hasn't yet been submitted, the Solicitation has not been made)
- You visit to present that proposal – Move (THIS is the Move into Solicitation)
- You chat with one of your major donors at the annual lifetime giving celebration – Social Sighting
- You call a donor to thank him for his three year pledge – Contact (important, but no forward movement)
- You call a donor to ask for a meeting to report on the good work accomplished due to his three year pledge – Contact (still important, but no movement yet)
- That donor agrees to start a new gift conversation with you, to continue the work his gifts have supported – Move (you have invited Assessment for a new gift)

Additional Reflections on the Mataphysics of Quality

from **Zen and the Art of Motorcycle Maintenance: An Inquiry Into Values**, by Robert M. Pirsig

“You look at where you're going and where you are and it never makes much sense, but then you look back at where you've been and a pattern seems to emerge. And if you project forward from that pattern, then sometimes you can come up with something.”

“Some things you miss because they're so tiny you overlook them. But some things you don't see because they're so huge.”

“The study of the art of motorcycle maintenance is really a miniature study of the art of rationality itself. Working on a motorcycle, working well, caring, is to become part of a process, to achieve an inner peace of mind. The motorcycle is primarily a mental phenomenon.”

“Peace of mind produces right values, right values produce right thoughts. Right thoughts produce right actions and right actions produce work which will be a material reflection for others to see the serenity at the center of it all.”

“The truth knocks on the door and you say, ‘Go away, I'm looking for the truth,’ and so it goes away. Puzzling.”

“Care and Quality are internal and external aspects of the same thing. A person who sees Quality and feels it as he works is a person who cares. A person who cares about what he sees and does is a person who's bound to have some characteristic of quality.”