

# Peak Performance <sup>®</sup>

## (Ensuring Gifts at the Highest Possible Level)



JEROLD PANAS, LINZY & PARTNERS

Your role for your organization is to secure the largest gift possible. In the shortest amount of time. To the greatest joy of the donor. And a gift that meets an important institutional imperative.

There is one certain way to achieve this objective. That is to have an effective system in place that can be easily monitored. The most important and most often used of the prospect management systems is one called *Moves Management<sup>™</sup>*. (The term, by the way, is the best known and is registered and licensed to the Institute for Charitable Giving)

If you use this process, you are assured of success. It is fail-safe. This PP measures your practice and effectiveness.

RATING SCALE	POINTS	TOTAL POINTS	YOUR EVALUATION
<b>Always (or an answer of yes)</b>	<b>4</b>	100 to 90	Outstanding—you're doing a great job. You are assured of success
<b>Most of the time</b>	<b>3</b>		
<b>Sometimes</b>	<b>2</b>	89 to 78	You're doing a good job. Work on those areas that still require attention.
<b>Not often</b>	<b>1</b>		
<b>Never (or an answer of no)</b>	<b>-1</b>	77 to 64	Only fair. You need to work on bringing your process to a better level.
		63 and Below	You're operating by "swoop." You aren't as successful as you could be.

PEAK PERFORMANCE FACTORS	POINTS
1 Are you securing major gifts in the quantity and at the level you feel you should?	
2 Do you have a way to monitor progress and measure results in your planned and major gifts programs?	
3 Do you now have in place a prospect management system (most often called <i>Moves Management<sup>™</sup></i> )? Note: <i>If the answer to #3 is yes, give yourself 4 points for #4.</i>	
4 If the answer to #1 is no, do you intend to institute such a program in the near future?	
5 Does the fundraising staff (or you and the CEO) meet monthly or at least every other month to discuss the assignment of top level probable donors and strategies?	
6 (The <i>Moves Manager</i> is the fundraiser who oversees the process and works with others to advance relationships. The <i>MM</i> also carries a portfolio of probable donors.) Are planned and major gift professionals specifically assigned portfolios and given the responsibilities of a <i>Moves Manager</i> ?	
7 (A <i>Natural Partner</i> is someone who has influence with or a natural relationship with a given probable donor.) Is there a conscientious effort to identify and engage Natural Partners with top level probable donors?	
8 Are the CEO and other top level organizational leaders (staff and volunteers) fully engaged in their roles as Natural Partners?	

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**PEAK PERFORMANCE FACTORS**

9	(The <i>Primary Player</i> is the <i>Natural Partner</i> in the best position to advance a relationship and provide leverage for making a gift. It can be a CEO, a surgeon at the hospital, a peer, a board member, or whomever.) Do you seek to identify and involve a <i>Primary Player</i> for each probable donor on your <i>Moves Management™</i> roster?	
10	Do you have a manual or written procedures governing your practice of prospect management?	
11	Has the fundraising staff been through a training session on the use and application of <i>Moves Management™</i> and is this revisited at least every two years?	
12	Is an effort made to keep non-fundraising senior staff aware of the use of the prospect management system so they understand the work of the fundraising staff?	
13	Are fundraisers assigned metrics pertaining to the number of “moves”. This includes contacts by personalized written communications, telephone, or personal visit?	
14	Are fundraisers given the responsibility of developing specific plans, including gift targets and timelines for each person in his or her portfolio?	
15	Are probable donors ranked by gift potential?	
16	Are probable donors ranked by readiness to give?	
17	Do you have a person designated to monitor and track the contacts made by the fundraising staff and other Natural Partners?	
18	At least once a year, do you do a complete analysis of who on the roster should be dropped, moved to a lesser status, or added?	
19	Do you follow the dictum that every move should bring a person closer to a gift outcome?	
20	Does every move have an objective?	
21	Does your database allow for the forward planning of contacts or moves?	
22	Does your database allow for the designation of Natural Partners who are associated with a given probable donor?	
23	Are you able to track and summarize moves according to the levels in the fundraising cycle (i.e., qualification, cultivation, solicitation, and stewardship)?	
24	Are you able to track and summarize contacts (moves) according to a specified method (i.e., personal visit, telephone, or customized written communication)?	
25	Are the plans and implementation of moves a major element in the annual evaluation of planned and major gift fundraisers?	

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**Total This Page**

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