

Standards Manual Addendum

Definitions and Guidelines for
Moves Management Reporting

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Introduction

This addendum to the AHP Standards Manual offers standardized definitions for terms used in reporting and discussing moves management performance. Standardized definitions for moves management are essential for ensuring clarity, consistency, and comparability across healthcare philanthropy programs.

Moves management—the strategic process of identifying, cultivating, soliciting, and stewarding donors—directly influences relationship-building success and long-term fundraising outcomes. Without a shared vocabulary, organizations risk misinterpreting key activity metrics, under- or over-reporting performance, and making decisions based on inconsistent data.

By establishing common definitions for each stage of the moves cycle, this addendum aligns with the AHP Standards Manual’s overarching purpose: to provide a common language and framework for transparent, accurate reporting. In the context of moves management, the purpose is to measure and report on gift officer performance. These definitions empower development teams to track activity in ways that are meaningful, comparable, and actionable, enhancing both internal strategy and external benchmarking. In doing so, they help ensure that the profession maintains credibility with donors, leadership, and peer institutions while improving the ability to measure and communicate impact.

Foundational Concepts and Terms

This section clarifies key terms, such as the distinction between “moves” and “activities,” that underpin effective moves management tracking and reporting.

Activity: Any action taken by a development professional in support of cultivating, soliciting, or stewarding a prospect, that is not substantive enough to qualify as a move. Activities include sending a thank-you email, updating donor records, preparing proposal materials, or attending an event with a prospect.

Coverage: The percentage of managed donors or prospects (those in MGO portfolios) that have at least one Move recorded within the reporting period.

Major Gift: Any gift of \$10,000 or more from an individual.

Major Gift Officer (MGO): A staff member whose primary role is to secure major gifts from individuals.

Major Gift Solicitation: Solicitations of \$10,000 or more made by a MGO during the reporting period. Includes outright major gifts, pledges, grants from private and corporate foundations, and planned gifts.

Move: A substantive, strategic interaction between an MGO and a prospect that moves them closer to making a gift.

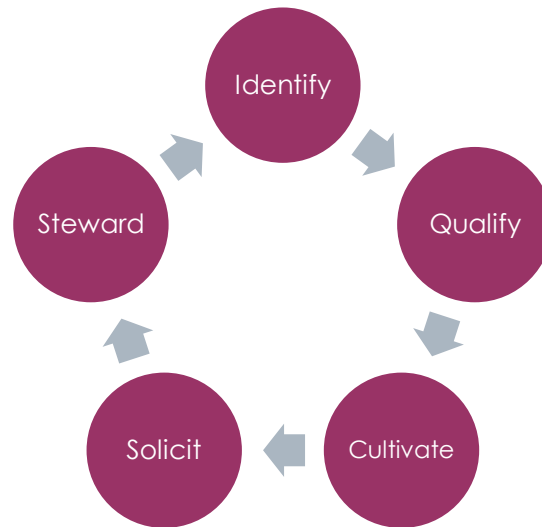
Reporting Period: The last 12-month fiscal year.

Solicitations Awarded: Major gifts or commitments made as a result of an ask by a MGO. All gifts/commitments awarded in the reporting period are included, even if the ask was made in a previous fiscal year.

Fundraising Stages

AHP recognizes five stages in the major giving fundraising process: identification, qualification, cultivation, solicitation, and stewardship. Typically, a prospect research team manages the Identification stage, and the remaining stages fall to the major gifts team. We cover each stage in detail below.

Figure 1: The Major Gift Fundraising Cycle



◆ Stage 1: Identification

Identification is the stage in which the prospect is identified through giving, referrals, or research. This stage is typically used by prospect management.

Sample Activities

- Prospect research confirming potential capacity or connection
- An individual requests information about giving to the organization
- Meeting or getting to know an individual at an event

◆ Stage 2: Qualification

Qualification is the stage in which the prospect's capacity and affinity to make a major gift are determined through personal contact.

During this stage, the major gift officer asks a series of questions to:

- Assess the prospect's ability to make a gift.
- Determine the prospect's interest and openness to support the institution.
- Schedule a follow-up visit with the prospect, mark as not a prospect, or refer the prospect to annual giving.

Sample Moves

- Conversation to assess giving capacity and interest
- A meeting that results in a clear next step or referral elsewhere

Sample Activities

- Follow-up thank-you or scheduling email with the prospect
- Unanswered call attempts

◆ Stage 3: Cultivation

Cultivation is the stage in which the fully qualified prospect is engaged to identify opportunities for philanthropic participation.

During this stage, the major gift officer will:

- Ask additional questions to determine the prospect's area of interest and to use this information to make connections back to the institution's priorities.
- Determine ask amount/vehicle/recognition:
 - What level of gift can we ask the prospect for?
 - Is the prospect likely to make an outright gift, planned gift or combination gift?

- Will prominent recognition be important?
- Provide information to excite the prospect about the institution's funding opportunities.

Sample Moves

- Meeting to discuss interests and connect them to funding priorities
- Introduction of prospect to key leadership
- Site visit, tour, or event with meaningful engagement

Sample Activities

- Sharing an article, video, or update tied to the prospect's interests
- Casual check-in or holiday message

◆ Stage 4: Solicitation

Solicitation is the stage in which the prospect is asked for financial support for a specific philanthropic purpose and follow-up steps are taken to negotiate and close the gift.

Sample Moves

- Ask meeting with a defined amount, purpose, and gift vehicle
- Proposal sent with follow-up discussion

Sample Activities

- Message acknowledging the ask or discussing recognition

◆ Stage 5: Stewardship

Stewardship is the stage in which the donor has made a philanthropic commitment, and the institution provides appropriate recognition to create an ongoing positive relationship.

Sample Moves

- Meeting or call to share the impact of the gift
- Impact report
- Donor recognition conversation
- Intimate celebratory events
- Article in newsletter featuring donor

Sample Activities

- Any informal, passive or maintenance interaction with the donor