

# Development for Conservation

## Getting Started with Major Gift Development

Presented at

**River Rally - 2018**

**Olympic Village, California**

2 May 2018

**David Allen, Development for Conservation**



**DEVELOPMENT  
FOR  
CONSERVATION**

### Outline for the Session

- Introductions
- Current Trends in Philanthropy
- Why People Give
- How People Give
- Priorities
- Cultivation Basics



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### Common FR Mythology

- Money comes from corporations and foundations
- We can't raise money because we don't know any rich people
- \$1,000 is a lot of money
- My time should count



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### Three Opening Premises

#### Major Gift

The word “**major**” should modify the word “**gift**,” and NOT the word “**donor**.”



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### Three Opening Premises

Organizations raise money from people who already give them money.



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### Three Opening Premises

People give money because they want to; it's part of *their* agenda.



Not because they're "sold."



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### FREE Executive Summary

Download your FREE executive summary of *Giving USA 2016* at <https://givingusa.org/tag/giving-usa-2017/>



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## Why do People Give?

1. What's being done is worth doing
  - Belief in the Mission
2. The organization involved can get it done
  - Fiscal stability
  - Regard for staff leadership
  - Respect for the organization locally
  - Regard for volunteer leadership

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### Definitions: Annual Gifts

- Annual expectation (renewal)
- General organizational appeal (operations)
- Mail or phone solicitation
- Quick response
- Small(er) gift size
- Measure of success = YES




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### Definitions: Major Gifts

- Specific need
- Unique appeal
- Personal ask
- Multiple visits
- Large(r) gift size
- Measure of success = ADVANCE




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## Ultimate (Planned) Gifts

- Long-term relationship with organization
- Organization is one of donor's only charities
- Desire to leave a legacy
- Perhaps self-conscious about ability to give during lifetime



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## Sustainability

Robust, resilient, sustainable organizations work with their donors on **annual gift, major gift, and planned gift** programs, all three, *at the same time* with systematic board member engagement and adequate staff support.



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## Elements of a Development Plan

- Major Gifts and Grants
- Annual Giving
  - Giving Circles
  - Renewals
  - Special Appeals
- Events (Fundraising and Recognition)
- Foundation Grants
- Corporate Gifts
- Planned Giving

*Other elements visible in background: The Big Trip, Annual Meeting, Newsletter, Research, Public Relations, Marketing, Ringing, One-to-One, Donor Base, Recruitment*



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## Start Here



### How much do we need to raise?



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### Raise it once

- Capital
  - Land
  - Buildings
  - Equipment
  - Endowment

### Raise it every year

- Operations
  - People
  - Utilities
  - Supplies
  - Travel






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\$100,000

**1 X \$100,000**



DEVELOPMENT OPPORTUNITIES David Allen | Development for Generation LLC

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\$100,000

**10,000 X \$10**



DEVELOPMENT OPPORTUNITIES David Allen | D

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**For One-Time Money**

5 Prospects = 1 Gift = 25-40%

9 Prospects = 3 Gifts = 25-40%

24 Prospects = 8 Gifts = 25-40%

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EXW#Z KDW#GR#GRB



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### Getting Started

- Make your own gift
- Screen your current donor list
- Select a set of prospects to get to know
- Call each one
- Cultivate (get to know) each one
- Take notes



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### Getting Started

Ask yourself this question:

**WHY** would this person make a major gift to my organization?



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## The Donor Pipeline

- A. Donors who are ready to be asked
- B. Donors with a known interest in a specific program, project, or *outcome*
- C. Donors who are warming to the organization and mission
- D. Donors we are connected to but really don't know yet
- E. Donors we are not connected to



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## Connections

- Donors who have a known (or suspected) strong interest in what we're doing,

AND

- We have access to.




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## Starter Goals

- Personally ask (or participate in asking) each donor for a major gift for a relevant project within the next 3 years.
- Contact (interact with) each prospect at least four times each year before asking for money. A fifth contact can be an annual renewal.
- 100% Renewal Rate



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## Six Basic Principles

- Facetime is KING
- Redundancy
- Prospects selected based on giving capacity
- Three-year cultivation plans
- Relationship is recorded in the files
- Asking = Cultivation



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## Getting Started

- What's the next cultivation step?
- Who's going to do it?
- By when?



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## Cultivation Activities

- Sign renewal and thank you letters
- Phone calls (esp to say Thank You)
- Introductions to other leaders
- Invitations to events
- Share news and stories; share the Strategic Plan
- Experiences on the land
- Overflight



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## A Word About Donor Files

- You need them
- Include essential contact info
- Copies of everything that comes from THEM – including email and checks
- Strategy and cultivation planning
- Do we have pictures?



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# DAVID ALLEN

I am a non-profit organizational development consultant. I work with nonprofit organization boards to help their members learn how to be better leaders and advocates.

My background includes 30 years working in membership fundraising, major donor development, communications, and marketing. I worked for about half that time for Nature Conservancy (TNC) chapters in Oregon, Texas, and Wisconsin. In addition to my duties for the individual chapters, I served TNC as an internal fundraising consultant and major gift development trainer.



In 2000, I served as the vice-president of operations for the Wisconsin-based, international conservation organization Sand County Foundation, a position I held through mid-2009.

Gathering Waters Conservancy, a land trust service agency based in Wisconsin, called me in 2002 to ask whether I would be interested in teaching a seminar for Wisconsin land trusts on major donor development. From 2002, then, through 2009, I consulted on a nights and weekends basis with just a few clients each year.

In March of 2009, I launched my consulting business full-time using the name **Development for Conservation**.

Also in 2009, I partnered with Nancy Moore to form Conservation Consulting Group. Together we help land trusts prepare for accreditation by providing assessment, planning, and leadership coaching services.

I consider myself a strategic thinker, problem solver, facilitator, educator, and program developer who brings a particular passion for conservation and the environment.

## **Practice Competencies**

### *Fundraising*

- Development Audit
- Staff/Board Training and Development
- Major Gift Coaching
- Capital Campaigns

### *Organizational Development*

- Strategy Development
- Practice & Process Assessment
- Problem Solving Facilitation
- Marketing

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