

Development for Conservation

Board Fundraising

Skills & Tools for Major Gift Donor Development

Presented to

Blackfoot Challenge

Ovando, Montana

7-8 June 2018

David Allen, Development for Conservation



DEVELOPMENT
FOR
CONSERVATION

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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Overarching Philosophy

- People give money because we are doing something they want to see done.
- They give money to us because they TRUST us to get the job done.
- The job of the fundraiser is to match what people already want to do with opportunities that exist.



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Overarching Philosophy

- 90 percent of fundraising involves building relationships with donors.
- Fundraising is everyone's responsibility, but especially Board members.
- The fundraising work of Board members is organized by a Development Committee and supported by strong systems (staff).



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INTRODUCTIONS

- What is standing in the way of the Blackfoot Challenge raising the money it needs to be successful?
- If we are successful today, how will Blackfoot Challenge have changed?
- If we are successful today, what will you, personally, have learned?



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Perceptions about FR

Fundraising is BAD

- It's begging
- If we need money it means that we're doing something wrong – that we can't do for ourselves
- People don't like being asked for money and they won't like me if I ask them for money
- People shouldn't give their money away (unless they're rich)



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Perceptions about FR

If we build it they will come –

If we're good enough to deserve support, donors will find us and give us money



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Perceptions about FR

Money comes from corporations (who SHOULD give money away)

and from foundations (who HAVE TO give their money away)



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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 would anybody give
\$10,000 to
Blackfoot Challenge?

Every Year?

(How could we find out?)



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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 and Major (Gifts) describes the decision-making process, not the dollar amount.

Annual (periodic) Gifts require little, if any, deliberation by the donor.




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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 strong board member engagement and adequate staff systems support.



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Strategies

- Make the decision that giving to Blackfoot Challenge is worth it.
- Start by talking to people who already give to Blackfoot Challenge – Why do they give?
- Find local advisors.
- Use Charles. Use other staff. Use each other.



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Strategies

- Use the Strategic Plan.
(Big money follows Big vision.)
- Host at least one event *every year* to introduce people to Blackfoot Challenge.
- Use stories. Tell YOUR story.
- Bring people to the land. Let the land tell the story.



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Start Here



How much do we need to raise?



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Strategic Planning

Mission

↓

Strategy
(Direction, Activities)

↓

Plans
(Measurable in
Time & Scope)

↓

Budget

Fundraising Goal

↓

Strategy
(Direction, Activities)

↓

Plans
(Measurable in
Time & Donors)

↓

Budget

Total expenses less \$\$ from other revenue sources



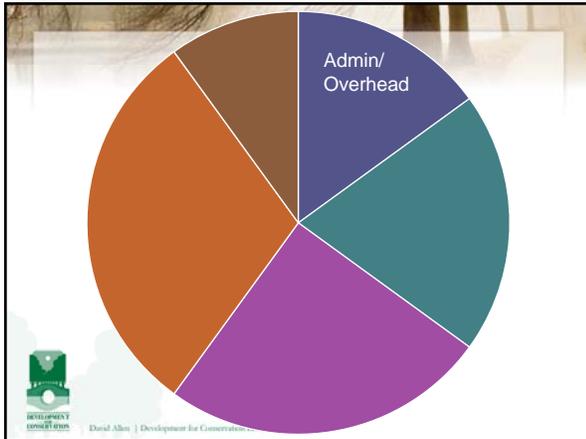
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What does Blackfoot Challenge Need?

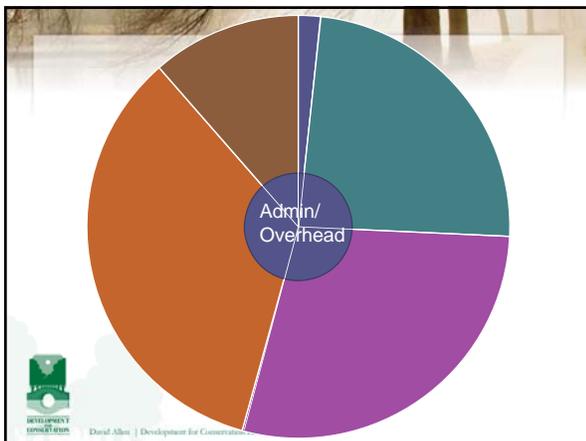
- More people giving
- More people giving \$1,000 or more every year (unrestricted)
- A small number of donors selected for major (restricted) gift cultivation



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Donors: How Many More?

- \$300,000
- = 1,500 donors giving \$200
- How will Blackfoot Challenge get to 1,500?



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How Many More?

- Assume 75% "Renewal" Rate
- Recruitment Target is 375 per year, *every year*
- How will Blackfoot Challenge recruit 375 new donors every year?



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More Members = Marketing

- Direct Mail
- Direct Contact (in person, telephone)
- Small Events
- Email
- Social Media
- On-Line – People find us
- Table/Booth
- Member-get-a member campaigns
- Gift Memberships
- Other?



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Are any of these strategies scalable enough?

Giving Segments (Individuals)

- Board Members
- Major Gift Prospects
- Annual Giving Leaders (giving > \$1,000)
- Members Giving \$100-249
- Members Giving less than \$100
- Lapsed Members & Non Members



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Fundraising Activities

- Annual Gift Renewal Systems
- Special Appeal Letters
- Participation in State or Regional Giving Days
- Gala or Benevon-style Fundraising Events
- Various "A-Thon" Events
- Crowd Fundraising
- Workplace Giving/Matching Gift Programs



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Fundraising Activity Worksheet

Prospects/Donors	AG Renewals	Special Appeals	Giving Day	Gala or Benevon Event	A-Thon Events (Bikes, Runs, Walks, etc)
Board Members					
Major Gift Prospects					
Annual Giving Leaders					
Annual Donors					
Lapsed Donors					
Non-Donors (Recruitment)					
Businesses					
Foundations					

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Fundraising Activity Worksheet

Prospects/Donors	AG Renewals	Special Appeals	Giving Day	Gala or Benevon Event	A-Thon Events (Bikes, Runs, Walks, etc)
Board Members	✓	✓	✓	✓	✓
Major Gift Prospects	✓			✓	
Annual Giving Leaders	✓	✓			
Annual Donors	✓	✓	✓	✓	✓
Lapsed Donors	✓	✓	✓	✓	✓
Non-Donors (Recruitment)		✓	✓		✓
Businesses				✓	✓
Foundations					

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Fundraising Planning Worksheet

Prospects/Donors	Monthly	Irregular	January	February	March	April	May
Board Members							
Major Gift Prospects							
Annual Giving Leaders							
Annual Donors							
Lapsed Donors							
Non-Donors (Recruitment)							
Businesses							
Foundations							

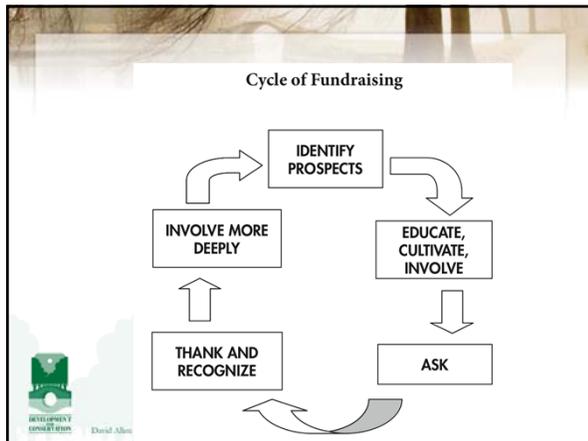
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An Important Premise

People give money to organizations because the organizations are doing something they already want to see done – not because they are “sold”



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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
- The logo for 'DEVELOPMENT FOR GENERATION' and 'David Allen | Development for Generation LLC' is visible in the bottom left corner.

- ## Three Conversations
1. One aimed at learning what might interest them most about Blackfoot Challenge
 2. One aimed at cultivating an emotional stake in a specific program, project, or outcome
 3. One in which we ask for a significant financial investment
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Getting Started

- Make your own gift
- Screen the entire donor list
- Select a set of prospects to get to know
- Call each one – say Thank You!
- Listen to each one to learn/discover their interests
- Pay attention and take notes



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Starter Goals

- Personally ask (or participate in asking) each donor for at least \$5,000 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 a renewal.
- 100% Renewal Rate



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Basic Principles

- Facetime is KING
- Redundancy
- Three-year cultivation plans
- Relationship is recorded in the files
- Asking = Cultivation
- The donor is the HERO



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Exercise

**I support Blackfoot Challenge
by giving money
because I believe that.....**



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Tools

- Strategic Plan
- Donor Screening
- Donor Search
- Key Advisors
- Charles' calendar
- Printed Materials
- Your own personal story



Board FR Menu

**What could Board Members
do to help DOUBLE the
money the Challenge
annually raises (from
Individuals) within the next
five years?**



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Barriers

- Opportunity
- Distraction
- Knowledge and experience
- Discomfort/Fear




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Fears

- **Intimacy**
- **Losing** (rejection)
- **Strong Emotion**
(the other person will get angry)
- **Not being liked** (or respected, or worthy)
- **Being wrong** in something I said
(I will look silly)
- **Not knowing something** I should
(not having the right tools or information)



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Necessary Support Systems

- Assigning **Mentors** to new Board Members
- Regular **Donor Screening**
- **News about progress** goes to Board Members first, and from Board to donors
- **News about gifts** is regularly sent to Board Members
- Board Members regularly **“Report in”**



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On My Website...

- These Slides
- First Thing Tuesday Blog
- Donor Screening
- Board Campaigns
- A Phone Call Script
- Ways for Board Members to Raise \$1,000

<http://www.developmentforconservation.com/about-us/resources/>



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Services

Assessment, Planning, Training, Coaching

*You can raise more money for your organization
– I can help.*

David@DevelopmentForConservation.com
608/239-5006



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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 gift 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

- Strategic Planning
- Practice & Process Assessment
- Problem Solving Facilitation
- Marketing
- Land Trust Accreditation

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