

Development for Conservation

Fundraising Metrics and How to Use Them

Presented at

**Land Trust Alliance Rally – 2018
Pittsburgh**

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David Allen, Development for Conservation



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If you don't know where you're going,
you'll end up somewhere else.



-Yogi Berra

Our Strategic Plan

- Goal #1 – Save the World
- Goal # 2 – Increase Membership
- Goal #3 – Raise as much Money as Possible

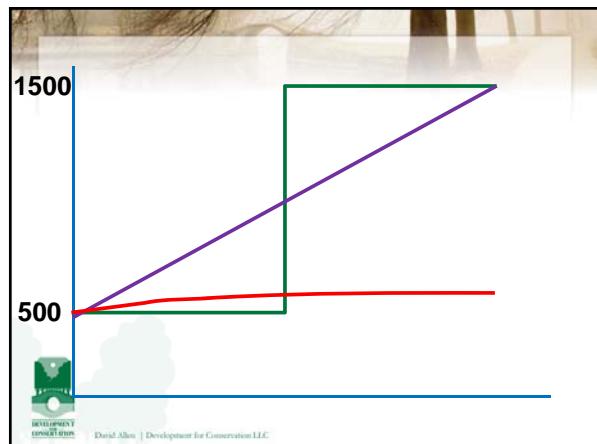


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Strategic Planning









Membership Growth

- Related to **Retention** up to a point
- Mostly related to **Recruitment**
- Land Trust growth ambitions fail mostly because fundraisers fail to adequately plan for and **budget for recruitment** activity.



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Here's What We Hear

- Challenge grants really work – you need to find us a challenge grant
- Newsletters are too expensive and they waste paper – ENews works just as well
- I know a great graphic designer who will do our appeal pro bono - she will help us raise more money



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Here's What We Hear

- People join because they get involved
- Direct mail doesn't work anymore - you need a better social media strategy
- Telephone calls just irritate people
- No one will read a four-page letter



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THEORIES

Here's What We Hear

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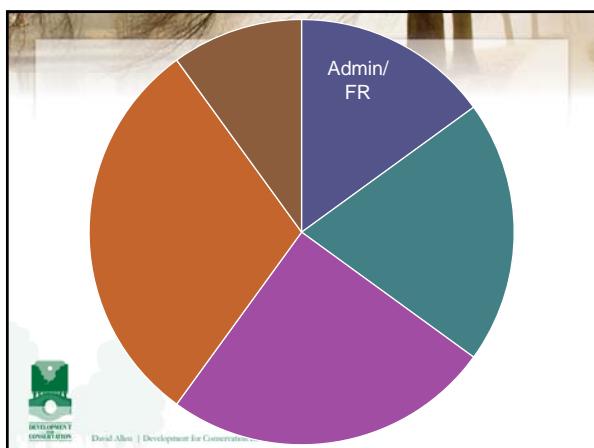
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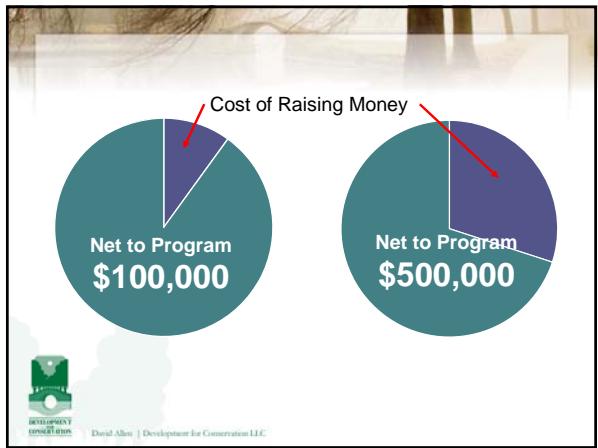
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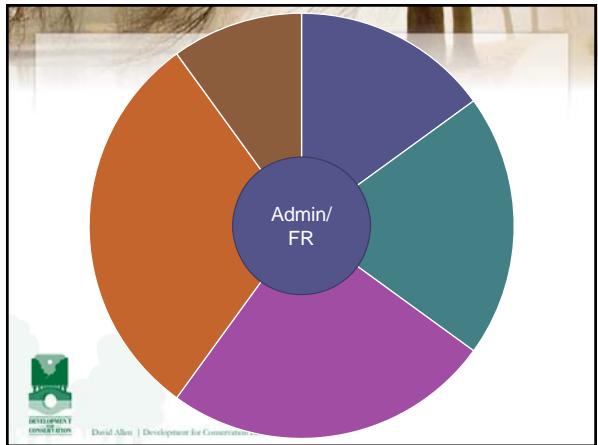


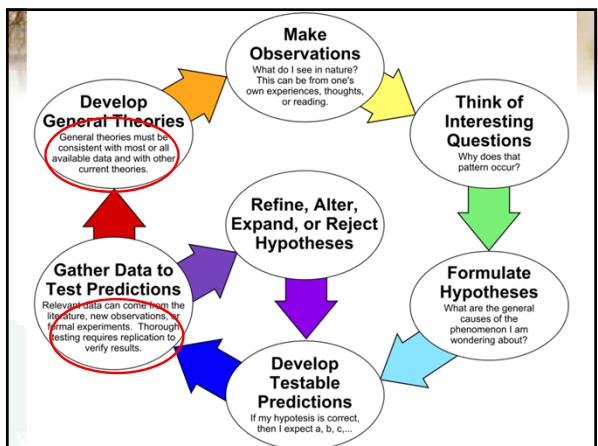
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Admin/
FR









Definition

A Year is 365 days (and sometimes 366)

The year I use for my metrics is

January 9 – January 8

(It doesn't need to be yours)



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Definition

A Source Code is a code that you assign to every GIFT that tells you what motivated the donor to give

- Implies that every response card (and envelope?) has a source code printed on it
- Implies that you have a key for the codes
- Implies that you take the time to chase down unattributed gifts



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Definition

A metric is simply something that can be counted or measured.

The value in a metric lies in the ability to draw conclusions from how it changes over time and how it relates to other metrics.



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We **care** about metrics because
the more we **understand** about what
we're doing,
the more **control** we have over the
outcomes.

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Metric #1 – Amount of Money

Data Needed from each gift or transaction

- Amount (Value)
- Date it was given (date on the check)
- Who (or what) gave it (Ind/Fdn/Cor)
- Restricted/Unrestricted
- Gift/Transaction
- Source Code!

 (This is the easy one!)

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Metric #2 – Number of Donors

Make some rules and be consistent

- Donors are **check-writers** (*figuratively*)
 - Some Business gifts are individuals
 - Some Foundation gifts are individuals
- Donors give money philanthropically
- Be consistent with memorials and pledges


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Metric #3 - Actual revenue split

- How much comes from passive sources vs. active fundraising?
- How much comes from corporate, foundation, and individual donors?
- How much comes from philanthropy vs. transactions?
- How dependent are we on just a few donors (or events)?



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Metric #4 – Cost of FR

FOR EACH FUNDRAISING ACTIVITY

- Design and Production
- Postage
- Consulting
- Transportation
- Premiums for joining (and fulfillment!)
- Paid ads
- Event venues
- Etc, Etc, Etc



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Metric #5 – Labor cost for FR

- FOR EACH FUNDRAISING ACTIVITY
- Staff – Not just how much time, but also whose time (opportunity cost)
- Volunteers
- Consulting



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Derivative Metric #1

Cost of acquiring a new donor

FR Cost of Recruitment Activity

of First Gift Donors



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Derivative Metric #2

Cost of acquiring a first renewal

FR Cost of LY Recruitment Activity

of First Renewal Donors



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Derivative Metric #3

Average Gift

Amount Raised

of Donors



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Derivative Metric #4

Renewal Rate

of LY donors who give this year

of LY donors



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Derivative Metric #5

Five Year Value of New Members

Total given by those donors since

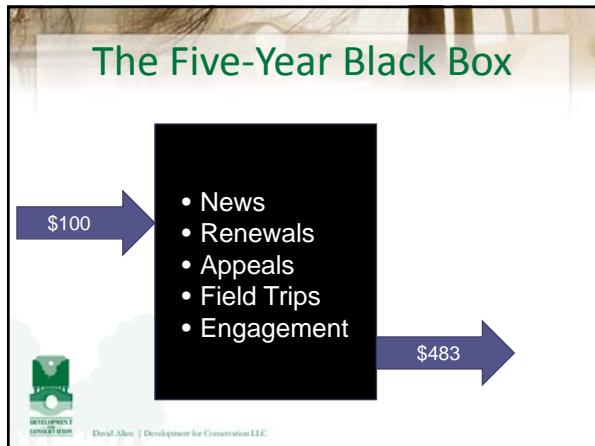
of First Donors in 2013

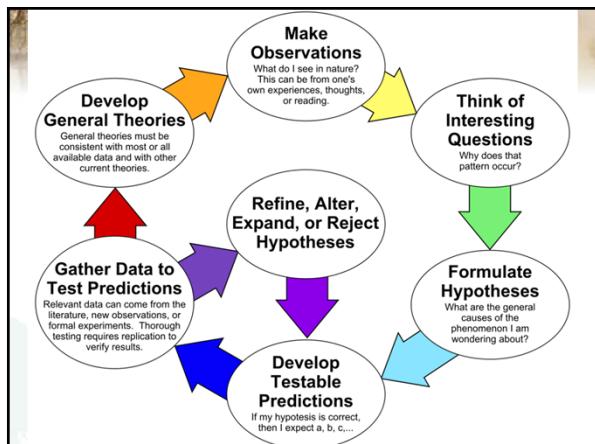


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Peter Drucker was right when he wrote:
“What gets measured gets managed.”

But why is this so often taken to a false corollary like *“What can’t be measured isn’t worth managing”*?

-Laurence Prusak

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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, 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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