

Development for Conservation

Building the Board you Need (and Will Need)

Presented at

**PALTA Land Conservation Conference
Skytop Lodge**

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David Allen, Development for Conservation



**DEVELOPMENT
FOR
CONSERVATION**

Job Responsibilities of a Board

- Governance
- Management
- Fundraising
- Celebration



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An Important Starting Premise

Not everything that happens in Board Meetings is actually board work.

Sometimes it's:

- Volunteer organizing
- Event organizing
- Information dissemination
- Information gathering
- Social time



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Common Complaints

- Our Board is getting older; we need to recruit younger people
- We approached great people to be on the Board, but they turned us down
- We need a lawyer and a CPA, but we can't find either one
- We need rich people on the Board for fundraising, but we don't know any rich people



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Agenda

- Rethinking the Recruitment Process
- Rethinking the Orientation
- Conducting Board Evaluations



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Rethinking the Recruitment Process



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Opening Premises

- You do not have to be on the board of directors to volunteer for an organization you love.
- Board membership should not be a reward for volunteer effort – or for giving money either.



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What do Board Members Do?

- Attend all board meetings and events.
- Serve on committees.
- Give money.
- Raise money.
- Advocate.
- Serve as Ambassadors back into their communities.
- Know the projects. Know the finances.



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Desirable Attributes

- Passionate About the Mission
- Diversity (Cultural, Gender, Geographic, Economic, Political, and so on)
- Leadership
- Smart, Curious, and Willing to Learn
- Integrity and Good Judgement
- Strategic and Analytical Thinking Skills
- Plays Well with Others
- Sense of Humor



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Ideas

- Board service is a major gift – for the donor. Treat it that way.
- Recruit from your existing supporters.
- Recruit LEADERS- people others will respect, take seriously, and follow.
- Recruit ACCESS.



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Access

- If you leave a message for someone – voicemail or email – and they respond to you, you have “access.”
- Access can be built, used, and over-used.



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What do Board Members Do?

- Board Directors **represent** one or several constituent communities on the Board

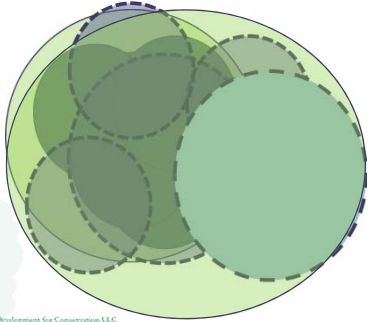
AND

- Board members **advocate** for the land trust back into their constituent communities



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Access



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Ideas

- Approach Board recruitment as you would major gift donor cultivation:
 - The people you need most are probably not available to you right away.
 - They might need to be introduced to the idea, wooed, and ultimately solicited.
 - Sounds like donor development.



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Also think about ...

- Cluster Recruiting
- Barriers to Participation
- Term limits
- Ambassadorship
- Credibility
- Long-Term Leadership Needs
- Bench Strength



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Rethinking the Orientation




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Re-Think

- Re-Think in terms of showing new board members what you want them to know.
- Re-Think in terms of practice.
- Re-Think in terms of the story they will tell others.



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1st Year Scavenger Hunt

- Sit in on one meeting of each board committee,
- Sign the Conflict of Interest Policy and Confidentiality Statements,
- Visit a program or work party in progress,
- Develop and practice an “elevator speech,”
- Call a donor to say thank you,
- Attend an organizational event. 



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1st Year Scavenger Hunt

Serve on the Finance Committee for the first year




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1st Year Scavenger Hunt

- Sit down with the Conservation Director or Conservation Chair and have them explain the Strategic Conservation Plan and Project Selection Criteria to you.
- Go on a Monitoring Visit – meet the landowner.
- Go on a Field Trip led by a naturalist.
- Lead a field trip to that same preserve



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Board Evaluations



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Job Responsibilities of a Board Director

- Governance
- Management
- Fundraising
- Celebration



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The Job – Board Director

- Attend all board meetings and events.
- Serve on committees.
- Give money.
- Raise money.
- Advocate.
- Serve as Ambassadors back into their communities.
- Know the projects. Know the finances.



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Board Evaluations

- Chair
 - Know, follow, and manage as needed the work of ALL the other committees.
 - ~~Hold other board directors accountable.~~
Create a culture of Integrity.
 - Annually conduct one-on-one interviews with each board director to discuss current committee assignments, other board related activities, general thoughts and opinions, and his/her own giving for the current year.



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Board Campaign

Board

- Chair, FR Chair, ED set Board goal
- Chair sets the tone, makes his/her gift first
- Chair solicits other Board members
- First Quarter Activity
- Pledges OK



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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 2004 to ask whether I would be interested in teaching a seminar for Wisconsin land trusts on major donor development. From 2004, 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, strategic 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

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