

Development for Conservation

Fundraising that Matters

An Introduction to Major Gift Fundraising

Presented at

Rhode Island Land & Water Conservation Summit - 2020

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David Allen, Development for Conservation



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Materials

[www.developmentforconservation.com/
about-us/resources](http://www.developmentforconservation.com/about-us/resources)

Presentation Materials - RI Summit - 20200307
Major Gifts

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Outline for the Session

- Introductions
- Where Money Comes From
- Why People Give
- Frank Talk About Money
- 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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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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An Important Premise

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



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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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The slide features a title 'Elements of a Development Plan' at the top left. Overlaid on the title are several colored words: 'The Field Trips' (red), 'Annual Meeting' (blue), 'Newsletter' (orange), 'New Member Research' (green), 'Member Recruitment' (yellow), 'Marketing' (light blue), and 'Ringding' (black). A small logo in the bottom left corner contains a green tree icon and the text 'DEVELOPMENT CONSULTATION'.

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

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The slide features a title 'Frames of Reference' at the top left. Below the title is a bulleted list of points. A small logo in the bottom left corner contains a green tree icon and the text 'DEVELOPMENT CONSULTATION'.

- Fundraising is about building relationships; only 10% is about "asking"
- All Board Members fundraise
- You have to give yourself to be effective as a fundraiser
- \$1,000 is not as much money as it used to be

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Frank Talk About Money

- It is difficult to do much for less than \$20.
- Time is NOT the same as money.
- “I don’t have enough” time/money really means “I choose to spend my time/money elsewhere.”
- \$100 is – literally – pocket change for most people. Many take \$100 at a time from ATMs.



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\$100 = small fortune?



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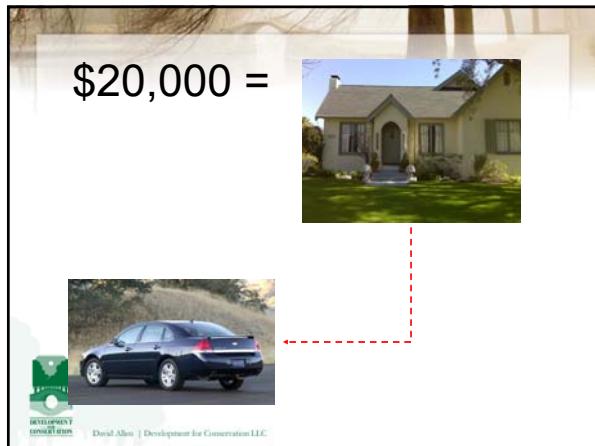
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\$1,000 =



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So....

- Regularly asking for \$100 is OK
- Almost everyone **could** give \$1,000 if they really wanted to
- Many people could give \$10,000 if they could spread payments out over time
- Don't say NO for people by not asking

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Start Here



How much do we need to raise?

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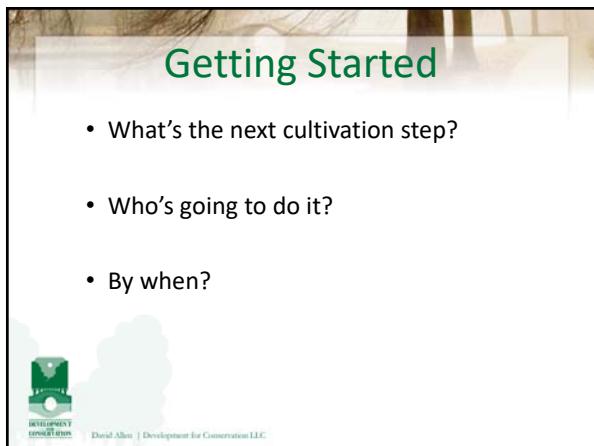


Six Basic Principles

- 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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On My Website...

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

[http://www.developmentforconservation.com
/about-us/resources/](http://www.developmentforconservation.com/about-us/resources/)

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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
- Strategic Fund Development Planning
- Staff/Board Training and Development
- Major Gift Coaching
- Capital Campaigns: Feasibility, Planning, Management

Organizational Development

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

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