

Development for Conservation

Essentials of Fundraising

Prepared for

WeConserve PA Conservation Conference

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David Allen, Development for Conservation



**DEVELOPMENT
FOR
CONSERVATION**

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Agenda

- I. Essential Definitions
- II. Essential Concepts in Fundraising
- III. Discussion



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Essential Definitions

A **GIFT** is something that is given freely, without expectations of receiving something of value (gifts and services) in return



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Essential Definitions

News and information, and small tokens of logo identification (decals) do not change the gift status.

Discounts and larger goods and services change the fundamental nature of the exchange from gift to transaction.

Transactions are NOT gifts.



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NOT Gifts

- Dinner tickets
- Auction items purchased
- Sponsorships
- Golf tournaments
- Field trip fees
- Raffle tickets
- Agency grants
- Special Case: Memorials and Honoraria



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Essential Definitions



A **DONOR** is someone (or group of someones) who gives something they have to an organization or effort they wish to support.

Essential Definitions

- The word “**MAJOR**” describes the act or gift, not the donor making it.



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Essential Definitions

A **Major Gift** is “major” in that it is a major *decision* for the donor. It is most often given in support of a specific program, project, or outcome.

It is thus differentiated from an “annual” gift.



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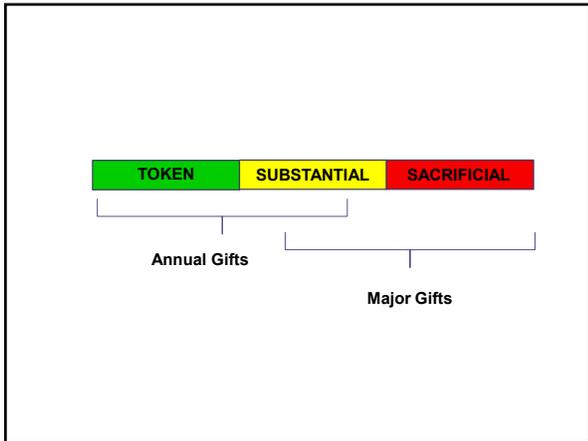
Essential Definitions

An **Annual Gift** is given in support of a mission, ideal, or vision.

Annual gifts are most often unrestricted and renewable, and are solicited that way.



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Essential Definitions

- Annual, Major, and Planned gifts complement each other and are NOT mutually exclusive
- A gift of land is a Major Gift
- A gift of Board service is a Major Gift



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Essential Definitions

Major Gift Fundraising is the active, strategic cultivation and solicitation of individual funding decision-makers.

A **Major Gift Prospect** is someone you are working with because you believe they will make a major gift.



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Essential Concepts

- There are more people in your community who love what you do than you know.
- There is more money in your community than you have raised.
- Major Gift Development is how you get closer.



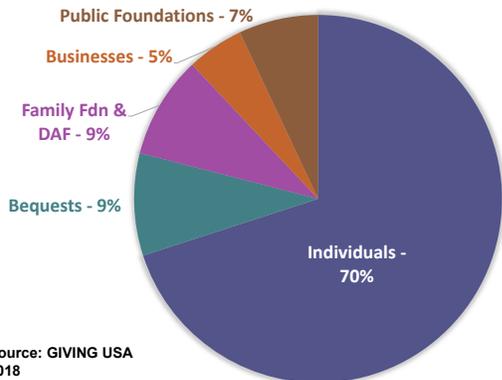
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Essential Concepts

Major Gift programs are strongly correlated with organizational loyalty, estate giving, and lifetime giving.



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Source: GIVING USA 2018

Essential Concepts

We raise money from people who already give money.

The exercise of securing “first” gifts is marketing and often costs more than it raises.



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Essential Concepts

The most accurate predictor for whether a solicitation will be successful is how recently the donor has given.



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Essential Concepts

Fundraising letters are NOT letters

Few people will read them at all, and those who do won't read them from start to finish

Longer letters are better;
letters build around a story are better

This is easy to test



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Essential Concepts

Donors give for their own reasons

And often for reasons that are
irrational, emotional, and hard to influence

We do not help our fundraising when we focus
our communication on the rational and
intellectual



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Essential Concepts

Successful fundraising is less about “selling”
than about “finding”

Instead of asking people to help “us,” ask
how we can help them

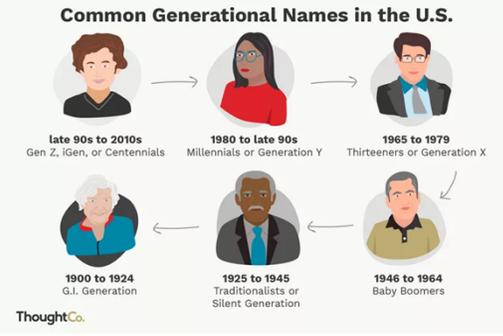
And talk about what we **believe**



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Essential Concepts

Common Generational Names in the U.S.



ThoughtCo.

Essential Concepts

- MYTH: We have the same people giving today that gave ten years ago.
- FACT: You might have the same *number* of people, but between a third and a half of current donors are brand new *every year*.
- This is easy to test.



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Essential Concepts

- MYTH: Our membership is aging
- FACT: Your members are aging. YOU are aging. But your membersship might not be.
- This is easy to test.



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Essential Concepts

One way to think about raising money is to consider how much money a donor will give over the next 6-12 weeks.

Perpetual, resilient organizations need to think about how much money a donor will give over the next 6-12 years.



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Essential Concepts

- Boomers / Gen-Xers
- Paper
- Engagement with the land
- Personal relationships (especially with Board members)
- Major Gift Fundraising
- Planned Giving



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An estimated \$68 Trillion will transfer from Boomers to **Gen-Xers and Millennials** between now and 2030



Source: *Forbes*

Essential Concepts

- If you are not actively involved building major gift and planned gift development programs right NOW, you will miss out on some or all of this transfer.



Essential Concepts

Raise Money for Conservation Costs

- Purchase Price
- Due Diligence and Closing
- Stewardship Endowment
- First Day Stewardship
- First Year Stewardship



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Essential Concepts

The most effective way to build an endowment is to build a planned giving program



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Discussion Questions

1. Something that reinforces what you are already doing
2. Something that surprised you
3. Something you can put to immediate use



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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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