

Development for Conservation

Considerations for Building (or Strengthening) a Major Gift Program

Prepared for

OR-WA Land Camp

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David Allen, Development for Conservation



**DEVELOPMENT
FOR
CONSERVATION**

Agenda

- I. Pep Talk
- II. Essential Definitions
- III. Fundraising is Easy!
- IV. Segmentation
- V. Creative Strategies
- VI. Mistakes People Make
- VII. Discussion



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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



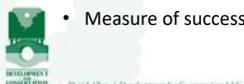

Definitions: Major Gifts

Major Gifts (stop and think gifts) require consultation, deliberation, and time



Definitions: Major Gifts

- Specific need
- Unique appeal
- Personal ask
- Multiple visits
- Large(r) gift size
- Measure of success = ADVANCE

Factors Defining Major Gifts

- How do I perceive the organization?
 - What does their Board give?
 - What is their current scale of giving?
 - What are my friends giving?
- How do I perceive myself as a donor?
- How much do they need? How much are they asking from me?



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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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Getting Started

- Date
- How much will we ask for?
- Who will ask?
- Where will we ask?
- How will we ask?
- WHY WILL S/HE SAY YES?




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WHY??

LOVE

- Nature
- Mission
- Project
- Organization
- Asker



BUY

- Exposure
- Goodwill
- Nostalgia
- Dinner
- Social Equity
- Peace and Quiet



Cultivation is about DISCOVERY, not SELLING

Engagement – Make it Personal

- Sign renewal and thank you letters
- Phone calls (esp to say Thank You)
- Introductions to other leaders



- Small Social Events (especially on the Land)
- Share news and stories; share the Strategic Plan
- Experiences on the land

Segmentation

- Previous Gift Amount
- Age
- Geography
- Passion
- Engagement Experiences
- Longevity



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Creative Strategies

- Call ALL donors to say thank you!
- Wealth / Philanthropy Tools
- Real Estate
- Call Strategies
- Diverse Engagement



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Mistakes We Make

- Planning from behind
- Defining major gifts by dollar amount
- Failure to ask
- Measuring events by how many show up
- Confusing exposure with engagement
- Substituting electronic contact for more personal contact



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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

David Allen

Development for Conservation

David@DevelopmentForConservation.com

608-239-5006

608 West Dean Avenue
Madison, WI 53716

www.DevelopmentForConservation.com