

# Development for Conservation

## Fundraising that Matters

### An Introduction to Major Gift Fundraising

Prepared for

**Coalition of Ohio Land Trusts**

August 2021

**David Allen, Development for Conservation**



**DEVELOPMENT  
FOR  
CONSERVATION**

## Outline for the Session

- Essential Concepts in Fundraising
- How People Give
- Why People Give
- Cultivation/Engagement Basics
- Small Group Discussion
- Barriers
- Creative Opportunities



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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 (even though a portion of them might be tax-deductible).



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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.

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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.

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## Essential Definitions



A **Major Gift** is “major” in that it is a major decision for the donor.

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

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## Definitions: Annual Gifts

- Annual expectation (renewal)
- General organizational appeal (operations)
- Mail or phone solicitation
- Quick response

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## Definitions: Major Gifts

- Specific need
- Unique appeal
- Personal ask
- Multiple visits




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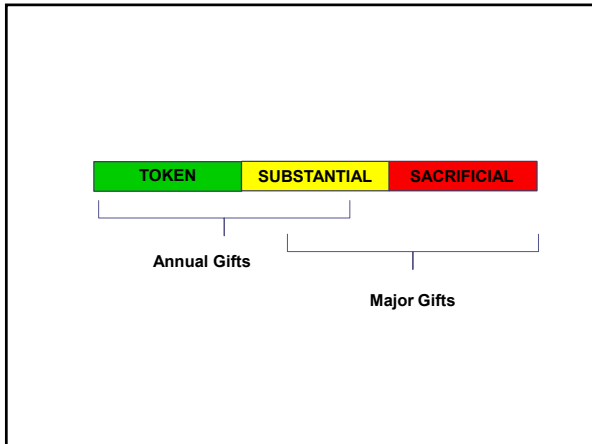
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## Essential Definitions

**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

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

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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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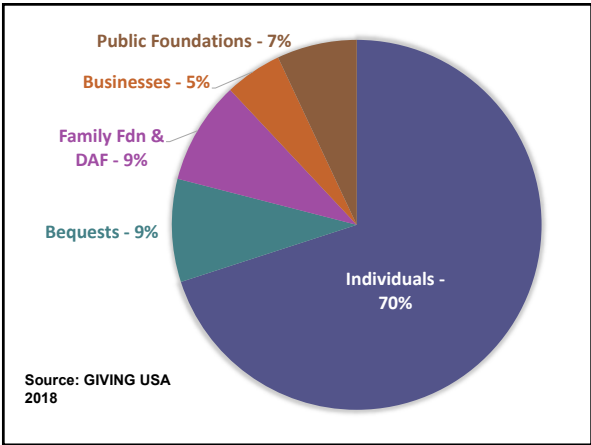
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## Why do People Give?

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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## Factors Defining Major Gifts

- How do your donors perceive the organization?
  - What does your Board give?
  - What is your largest gift?
  - Do your donors know?
- How do your donors perceive themselves as donors?
- How much do you need? (As a generalization, donors are unlikely to give more than 40% of the need under the best of circumstances.)



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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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### Elements of a Development Plan

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

*Other elements mentioned in the background: The Fundraising Plan, Annual Meeting, Newsletter, New Donor Search, Public Relations, Marketing, Ringing.*



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### Start Here



How much do we need to raise?



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### Strategic Planning




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**Raise it once**

- Capital
  - Land
  - Buildings
  - Equipment
  - Endowment

**Raise it every year**

- Operations
  - People
  - Utilities
  - Supplies
  - Travel



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**For One-Time Money**

5 Prospects = 1 Gift = 25-40%

9 Prospects = 3 Gifts = 25-40%

24 Prospects = 8 Gifts = 25-40%



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**Step 2**

**Why Will “They”**  
(Each Donor or Group of Donors)  
**Say Yes?**



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## CONTEXT

- Date
- How much will we ask for?
- Who will ask?
- Where and 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

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## WHY?


- Love
- Hate
- Fear
- Loss



EMOTION

- Commitment to Values
- Loyalty
- Social Standing



CONNECTION TO OTHERS

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Step 3

## Create Those Specific Circumstances



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### Engagement – Make it Personal

- Sign renewal and thank you letters
- Phone calls (esp to say Thank You)
- Introductions to other leaders
- Small Social Events
- Share news and stories; share the Strategic Plan
- Experiences on the land



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### Let's Do Something Important Together



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## January Donor Planning August

- Select a set of prospects to consider individually
- Propose a goal amount for each one
- Calendar the asks
- *Why will they say yes?*
- *Who needs to be involved?*
- *What will they see from us and when?*



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## Starter Goals

- Personally ask (or participate in asking) each donor for at least \$5,000 for a relevant project within the next 3 years.
- Contact (interact with) each prospect at least four times each year before asking for money. A fifth contact can be a renewal.
- 100% Renewal Rate



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## Time to learn from each other

One randomized Breakout session.

- Share ideas briefly
- Give everyone a chance to speak
- Write brief notes: will be typed & shared later with all



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## Breakout Session – 20 Minutes

- By way of introduction, hit the high points of how your land trust works with major gift donors now.
- What's holding you back? What would make a difference?
- How can we support each other?



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## Common Barriers

- Lack of VISION
- Emotionally Difficult
- Leadership is missing
- Not enough time



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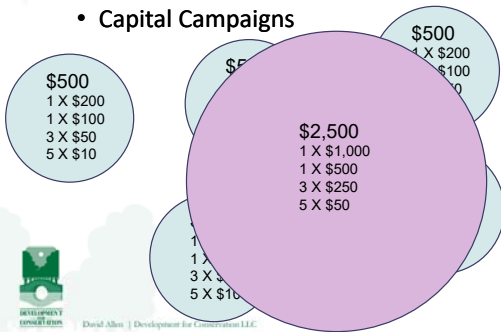
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## Creative Ideas

- Capital Campaigns



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## Opportunity Funds



- Filled by Planned Gifts?

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## Call Strategies

*If we find the right project for you within the next three years, can we come to you at that time for a gift of \$100,000?*



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## Appreciated Assets

- Stock / Securities
- Real Estate



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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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