

Development for Conservation

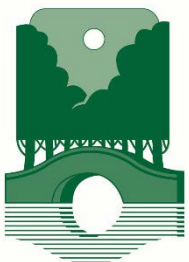
Creative Approaches to Raising More \$\$\$

Prepared for

Maine Land Conservation Conference

March 2022

David Allen, Development for Conservation



**DEVELOPMENT
FOR
CONSERVATION**

If I Could Change Two Things ...

- Learn to see us as helping people do what they want to do, instead of the other way around
- Learn to imagine why someone might say YES before we ask them



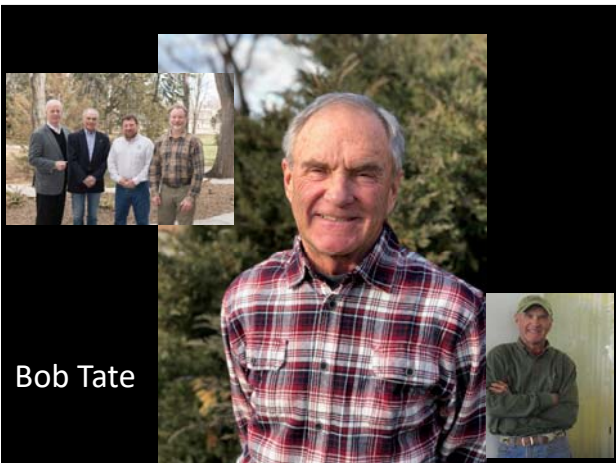
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Frames of Reference

- “Major” describes the decision to give, not the person making it.
- Major Gift Fundraising or Donor Development is the most important fundraising you can do.



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Gift of Real Estate - Tradeland

- 1,500 square foot Single Family Home, rented to CSU students
- \$360,000 appraised Value;
\$135,000 mortgage
- Needed radon and mold mitigation, paint, several significant repairs – total ~ \$35,000-40,000
- Tate wanted money split between four charities



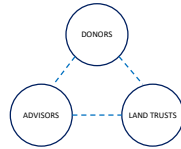
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Key Stakeholders

DONORS
Private Individuals
Corporations

ADVISORS
Tax Accountants
Tax Attorneys
Financial Advisors
Wealth Managers
Insurance Brokers
Real Estate Brokers

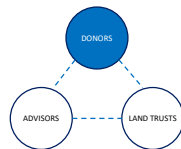
Land Trusts



Key Stakeholders – Donors Say “Yes” (Increasingly Aware)

Donors benefit from giving appreciated assets

- Tax Reduction (avoid capital gain tax)
- Tax Deduction (receive tax deduction at appraised value)
- Preservation (retain liquid assets v. complex assets)
- Simplification (remove complex asset from estate)



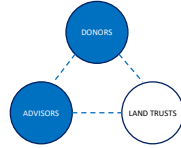
Key Stakeholders – Advisors Say “Yes” (Increasingly Aware)

Donors benefit from giving appreciated assets

- Tax Reduction (avoid capital gain tax)
- Tax Deduction (receive tax deduction at appraised value)
- Preservation (retain liquid assets v. complex assets)
- Simplification (remove complex asset from estate)

Advisors are willing

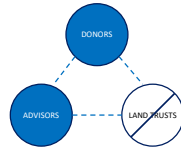
- Retain Current Generation (Sophisticated Outcomes)
- Capture the Next Generation (Donor Advised Funds)
- Grow Fee Based Investments (Convert Hard Assets to Cash)
- Earn Transaction Fees (Insurance & Real Estate)



Key Stakeholders – Most Nonprofits Must Say “No”

Most Nonprofits don't even ask for gifts of real estate

- Too complex (Bargain Sales)
- Too much risk
- Lack of allowable funds
- Lack of expertise
- “Mission Drift”
- Donor wants to support multiple nonprofits

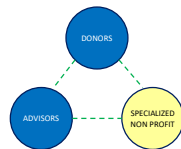


The Solution – The Specialized Nonprofit

Mission –

To promote the charitable giving of real estate by accepting real estate gifts of any kind, anywhere... fixing or remediating assets, converting them to cash... using the net proceeds to make grants to other non-profit organizations for current and planned gifts.

Through grants and educational efforts, make a meaningful impact on charitable giving through gifts of real estate.

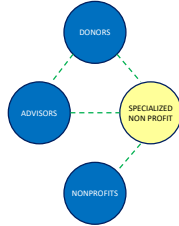


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Gift of Real Estate - Tradeland

- Tate wanted money split between four charities – RGF made that happen
- Tate gifted the house to Realty Gift Fund – a 501c3 nonprofit
- RGF paid off the mortgage, readied the house for sale, and sold it – Net proceeds ~ \$180,000
- RGF took 7.7% or about \$14,000
- One Colorado land trust and LTA shared half ~ \$42,000 each



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Legacy Match Campaigns – the Essence


- Member/donor names the land trust in their will
- Member/donor notifies the land trust in writing that the land trust has been named in their will
- \$500 is released from the matching grant



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Program Considerations

- Organized way to track legacy donors
- Web page with basic information
- Bequest Distribution Policy
- Point person to field questions



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Campaign Considerations

- Securing the matching grant(s)
- Determining the campaign specifics
- Marketing the campaign
- Orderly communication with matching gift donors – including the possibility of thank you notes



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Benefits to the Matcher

- Unbelievably leveraged giving
 - Average bequest donation is around \$80,000
 - A campaign that generates 20 planned gift notifications represents about \$1.6 million
 - Not bad for a \$10,000 grant
- A way to help NOW and help in the future



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Benefits to the Land Trust

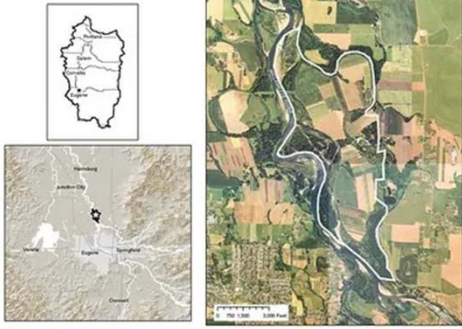
- Cash for use this year
- Knowledge of bequest commitments
- Opportunities to have different conversations with donors (life estates, appreciated assets, life insurance, annuities, and so on)
- Important new way to market planned giving



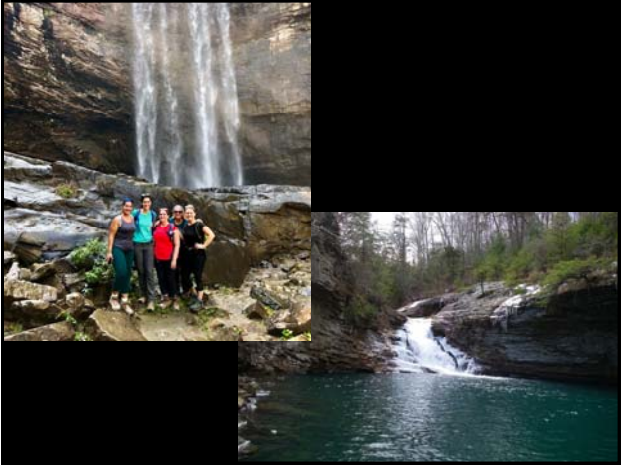
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The Green Island Project

GREEN ISLAND PROJECT AREA







Lula Lake Key Stewards

- \$2,500 per year + Work agreement
- Key access to the “Core Preserve” (including camping overnight) with reservations
- Core Preserve is only open to the public four days each month
- Core Preserve is open for organized groups at other times



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\$365 Clubs

- Attractive and compelling
- Works well with monthly giving programs (\$30/month)
- Appeals to younger donors
- Intuitive and easily marketable



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Call Gifts

“If we put this deal together before December 2023, can we come to you for a gift of \$100,000?”



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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

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