

# Development for Conservation

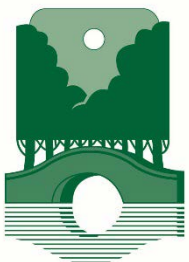
## Capital Campaigns A 101 Course

Prepared for

**New York Conservation Conference**

May 2022

**David Allen, Development for Conservation**



**DEVELOPMENT  
FOR  
CONSERVATION**



## Outline for the Session

- Review Premises
- Organizing Premises
- Different Types of Campaigns
- Capital Campaigns: Why and Why Not
- Basic Principles
- Feasibility
- Timeline and Budget
- Conclusions and Takeaways



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## 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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## Revelations

Money comes from PEOPLE.



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## Opening Premises

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

People care what THEY do with their money a lot more than what we do with their money



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## Donor Development Sequence

- A. Learn to talk about what you believe (more so than what you do)
- B. Attract people who believe what you believe
- C. Listen & Discover THEIR reasons for giving
- D. Match their interests with your opportunities
- E. ASK



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## Opening Premises

There is plenty of money in this community, and plenty of people who care, to support land trust vision and activities.

Land trusts are rarely limited by what donors have to give.

**Land trusts are much more limited by their willingness to ask.**



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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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## Four Donor Hurdles

- Do I have the money?
- Do I care enough about the project to give?
- Do I trust the organization doing it?
- Do I have enough time to consider these questions?



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## Revelations

“Major” describes the decision,  
not the person making it.



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## Definitions: Major Gifts

- Supports a specific project or need
- Unique appeal
- Personal ask
- Multiple visits
- Large(r) gift size
- Measure of success = ADVANCE



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## Definitions: Annual Gifts

- Supports the Mission (operations)
- Annual expectation (renewal)
- Mail or phone solicitation
- Quick response
- Small(er) gift size
- Measure of success = YES



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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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## Different Types of Campaigns

- Project Campaign
  - Single project, short(er) timeframe
- Endowment Campaign
  - Endowment-only or endowment mostly
- Comprehensive Campaign
  - A little something for everybody
  - Multiple projects
  - 2-3 years up to 5 years



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## Good Reasons to do a Campaign

- Large project to complete
- Multiple projects to complete
- Dog projects to complete and/or other costs to bury
- Exercise



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## Start Here



How much do we need to raise?



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## The money raised will cover:

- The actual value of land or easements acquired,
- + Expenses associated with due diligence and closing,
- + Immediate land management expenses,
- + Endowment to ensure responsible long-term management.

## Conservation Costs



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## WHY NOT??

- RISK
- Not ready
  - Not Organized
  - Missing Leadership
  - Not enough time
- All encompassing
- Endowment Only (My Opinion)



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## My Take on Endowment Campaigns

- Appeals to a small percentage of donors
- Results in permanently restricted funds
- Difficult to convey real urgency (can't walk there)
- Could be satisfied by a stronger planned giving program
- Better to raise endowment coincidentally with land acquisition
- Better to have running in background



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## Campaign Basics

- Goal (NET and GROSS)
- Board support
- Face-to-face asks
- Planning at the Individual Level
- Pledge period
- Naming opportunities
- Pyramid structure



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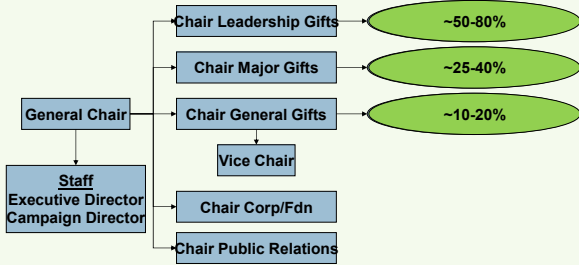
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## Planning Considerations

### Campaign Executive Committee Structure




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## Gift Table

	Gifts Needed	Prospects Needed	Goal for Giving Level
<b>Leadership Gifts (Phase I)</b>	6	20	\$1,400,000
<b>Major Gifts (Phase II)</b>	34	100	650,000
<b>General Gifts</b>	40+	~120	50,000
<b>TOTAL</b>	<b>80+</b>	<b>~250+</b>	<b>\$2,100,000</b>

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## Gift Table – Phase I

### Leadership Gifts

\$600,000	1	5	\$600,000
\$300,000	1	3	\$300,000
\$200,000	1	3	\$200,000
\$100,000	3	9	<u>\$300,000</u>
<b>Total for Leadership Gifts</b>	<b>6</b>	<b>20</b>	<b>\$1,400,000</b>

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## Are We F-ing Crazy?

- Can we find five people we could credibly ask for 25% of the goal?
- Will the Board all Give?
- Is the goal LESS than 20 times larger than the most we have ever raised in a year?

- **IF NOT, yes, you're crazy**



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## About Feasibility Studies

- Not recommended for campaigns less than \$500,000; always recommended for campaigns more than \$1 MM
- Cost: \$25,000-\$40,000 (150-250 hours work)
- Internal capacity audit
- External test of core messaging (case) and donor willingness to make gifts
- Returns an opinion on whether the campaign as envisioned is “feasible”



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## Reasons to do a Feasibility Study

- Prepares donors
- Lends confidence to solicitors
- Gathers and delivers objective feedback for the organization
- Tests feasibility of messaging and goals



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## Products

- Feasibility Opinion
- Preliminary Case Statement
- Draft Campaign Plan, Timeline, and Budget
- Recommendations for Campaign Chair
- List of Qualified Donors with Recommended Solicitation Amounts



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## General Timeline

- Feasibility Study
- "GO" decision
- Board Gifts Solicitation
- Leadership Gifts Solicitation
- Major Gifts Solicitation
- **Public Announcement Event (75-80%)**
- Major Gifts Solicitation Concludes
- General Gifts Solicitation
- Conclusion Event



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## Next Steps – 150 Prospects

- Donors who are ready to be asked –  
*When can we ask them?*  
*I need to imagine why they will say YES*
- Donors with a known interest in a specific program, project, or outcome –  
*Why will they say YES?*  
*I need to show them several opportunities*
- Donors who are warming to the organization and mission –  
*How do we get them excited about RPA and the Campaign?*  
*I need to learn more about their specific interests*
- Donors we are connected to but really don't know yet –  
*How do we get to know them?*  
*I need to meet them*
- Donors we are not connected to –  
*How do we meet them?*



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## Campaign Needs

- Donors
- Leadership
- Case statement
- Video – emotional content
- Solid Plan and Budget
- Discipline



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## Campaign Discipline

### Rehearsal

**Commitment to follow-up,  
includes record-keeping**



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## Ballpark Budgeting

- 7%
  - Case materials
  - Video
  - Travel
  - Events
  - Dedicated Staff time and/or Consulting
- 8% - Operating fund depression
- 5% - Uncollectible pledges



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## Last Words

- Should land gifts count?
  - **YES**
- Should planned gifts count?
  - **ONLY if they are irrevocable**
- Should agency grants count?
  - **Grants are leverage – part of your campaign, but not necessarily part of your campaign planning**



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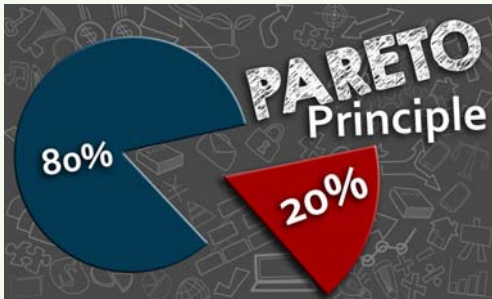
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## Last Words



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## Last Words

We waste too much time imagining why donors will say NO.

A better question is why they might say YES.



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**GO FORTH AND PROSPER**



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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](mailto:David@DevelopmentForConservation.com)

608-239-5006

608 West Dean Avenue  
Madison, WI 53716

[www.DevelopmentForConservation.com](http://www.DevelopmentForConservation.com)