

Development for Conservation

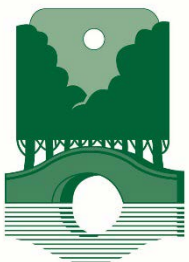
Fundraising for Now and Fundraising for Later

Prepared for

Land Trust Alliance Rally 2022

September 2022

David Allen, Development for Conservation



**DEVELOPMENT
FOR
CONSERVATION**

Premises

- Planned Gift Program Exists
- Major Gift Development Program Exists



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AGENDA

Legacy Match Campaigns

- Introduction to the Conceptual Idea
- Donor / Land Trust Perspective
- Small(er) Group Discussions



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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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Mississippi
Valley
Conservancy

Stewardship Circle
Bequest Challenge



Hello this is Bob
Ross from New
York City...

- I have no idea who this guy is!
- Is this a scam?
- What the heck is he talking about?
- Seems too good to be true!





Made Calls to
Trusted
Friends

Hey David have
you ever heard
of this?

Time to Get Excited and Get to Work!

- Call Bob back
- Gather details
- Present to committee
- Call another donor



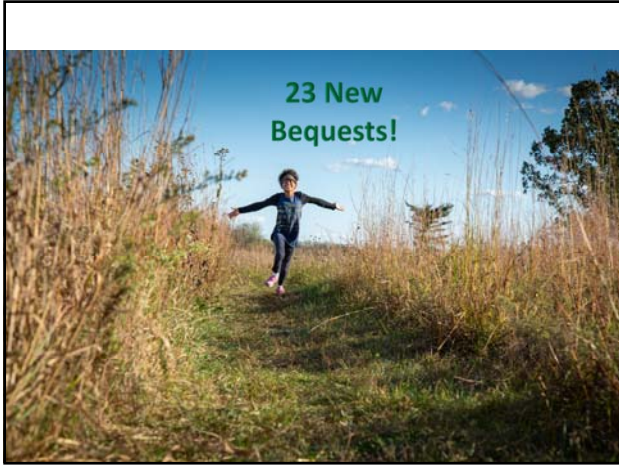
Time to Get Excited and Get to Work!

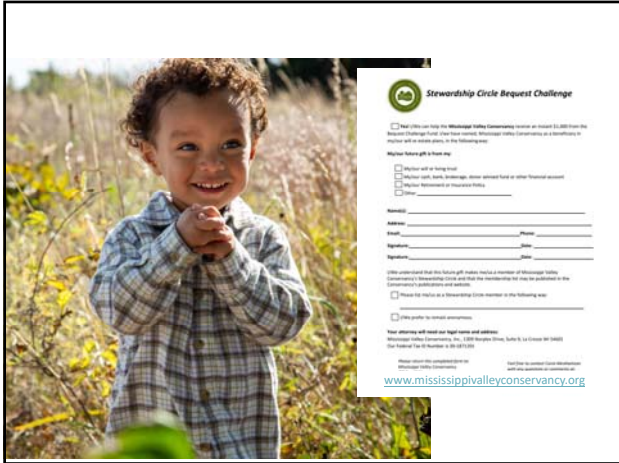
- Put a plan together
- Create documents
- Communicate about it
- Send first letter



Shout It Out!







Robert Curtis Ross

- Four careers
- Bob and Janet’s story
- “Give with impact”. Melinda French Gates
- Return on Donation

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Research and initial findings

- Happiness chemicals
- Multiple Choice Questionnaire presentation
- Seven touches between ASKs
- Challenge Campaigns – 1 for 1, 2 for 1, 0.5 for 1
- Seed campaigns
- Capital/Project campaigns



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Magic Words

- Couple
- Join
- You vs we
- 6th to 8th grade reading level



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Trail Conference The Land Conservancy Liaison

- 35 NY and NJ Projects
- Constitutional Amendment – First Nail
- Terrace Pond Crossing – Capital/Project
 - All hands
 - Know your donor
 - Cost +25%
 - Avoid Last Nail donors
- Felsinger – You never know!



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Magic Happens

- Legacy Challenge
- Robert W Wilson's brilliant idea

"If I name Big Apple Greeter in my will, Bob will give \$500 to BAG in my name, and BAG will get much more when I die."

- 50 successful campaigns



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Bob's Story

- Encourage people to make estate plans
 - helps women
 - great return on donation
 - supports worth causes
- No longer Bob and Janet's story; donors change their stories.



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What's in it for you personally?

- Only 42% of Americans have an up-to-date plan

"Biggest financial mistake intelligent people make"
Jill Schlesinger
- Forget your organization for a minute
- Make or update your plan
 - Helps you directly – how you want to be remembered
 - Helps the people you love.
 - Helps the organizations you love.
 - Do it!



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What's in it for your organization?

- Nurtures supporters
- Money
 - Cash now from challenger
 - Cash now from partners of challenger
 - Bequest cash or assets in the future – 9%
 - Alternatives to bequests
 - Increased giving during lifetime
 - Thank you card responses



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Thank You!

- Challenge Donors participate in the Thank You process
- Will not know the names
- Sends to land trust packets



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Sweet & bitter news



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Important Dates

- August Make-A Will Month
- **October 17-23, 2022** National Estate Planning Awareness Week



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Seven Touches

- Seven Touches between asks
- Can't be done by single MGO
- Should be delegated (to other staff, Board members, and other donors)
- Two for the price of one!



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Requirements

- Charity specific campaign
- Key to your donor base and organization's history
- Ethics
- Committed Board, ED and DD
- Trust and estates lawyer



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Recommendations and conclusions

- Ask your donors what they want to accomplish with their money.
- Make seven touches between Asks.
- Involve your staff and supporters in making touches.
- Analyze your organization – resources and commitment - Appropriate for a legacy challenge?



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What's in it for you personally?

- Make or update your plan
- Helps you directly – how you want to be remembered
- Helps the people you love.
- Helps the organizations you love.
- Do it!



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Small Group Discussions

- Can you think of a donor who might be interested in making a matching gift to stimulate planned giving?
- Why would that person be interested?
- If you were going to make this happen at your land trust, what might be your first action step?
- What questions would your Board have before pursuing a Legacy Match Campaign?



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19 Boonton Avenue
Boonton, NJ 07005
Ph: (973)541-1010
Fax: (973)541-1131
Web: tlc-nj.org

Planned Giving

Goal: 100 members in the Legacy Giving Circle

- **Marketing Strategy:**

- Develop planned giving brochure
- Develop other planned giving written materials
- Update all TLC planned giving outreach – mailing, email blasts, update and improve info in Facebook, newsletter, twitter, etc.
- Create 12 month marketing calendar with schedule of mailings, phone calls, and activities

- **Outreach Strategy:**

- Develop planned giving outreach list
- Decide if we want to do a matching gift campaign
- Develop outreach script
- Find volunteers to help with outreach

- **Program Sustainability Strategy:**

- Host Legacy Giving Circle launch event or party
 - Give members of Legacy Giving Circle special recognition gift (lapel pin, tree seedling, etc.)
- Create yearly events for members and potential (President's Luncheon, special cocktail party, intimate dinner, etc.)
- Continue to develop ways to nurture relationship with current living members
 - Gather testimonials



THE LAND CONSERVANCY OF NEW JERSEY

DEAR LEGACY GIVING CIRCLE MEMBER

Thank you so much for joining The Land Conservancy of New Jersey's Legacy Giving Circle. By committing a planned gift, you are helping us make a greater impact today and tomorrow.

Thanks to the Janet Ross Bequest Challenge, we have received \$1 million in pledges to date.

The Conservancy is working on a number of exciting projects and we are offering the Legacy Giving Society a sneak peek into the complex but rewarding work of land conservation. Want to know more about what our dedicated and hardworking staff are tackling every day? Then read on . . .



RAMAPOUGH LENAPE PARTNERSHIP

The Conservancy is working hard to preserve land around Split Rock Mountain in Mahwah, which is culturally significant to the Ramapoough Lenape Indian Nation. This summer we partnered with the Mahwah Environmental Volunteers Organization (MEVO) on a series of cleanups at this site, which was a dumping ground for decades. We have been awarded a grant from the Doris Duke Charitable Foundation to help the tribe establish their own land trust and steward this land once it is preserved. This ambitious project will positively impact the tribe and offer a gathering place for future generations to learn about and care for the land.

EDISON OPEN SPACE TRUST FUND

Our planning work tends to happen behind the scenes and sometimes doesn't get the attention it deserves. Did you know that to date we have helped 169 municipalities and counties in New Jersey with their open space, planning, farmland preservation, and stewardship needs? Right now the team is working with the town of Edison to renew their Open Space Trust Fund through a ballot question during the upcoming election on November 2. If passed, it would be a huge win for the town. Their Open Space Trust Fund expired in 2016, and this new proposal will include the purchase of much-needed parkland and repairs to busy recreation facilities in a densely populated area.

WEST BROOK RESTORATION, PHASE 2

Last year we completed a massive stream restoration at the headwaters of the West Brook before officially opening the Nancy Conger West Brook Preserve in West Milford. While preserving an additional 43 acres adjacent to the property earlier this year, we found a small stream with a dam that needs to be removed to make the wetlands as healthy as possible, improve water quality, and bring down the water temperature so fish can spawn here. This phase 2 restoration is planned for next year, and we look forward to ridding the property of manmade obstacles and invasive species so that it can return to its natural state.

YES, I would like to become a member of The Land Conservancy of New Jersey's Legacy Giving Circle.

I have already made the following gift(s):

- ☐ General Bequest
- ☐ Residuary Bequest
- ☐ Contingent Bequest
- ☐ Other_____

- ☐ Approximate value:
\$_____
- (optional)
- ☐ I wish to remain anonymous
- ☐ My date of birth is_____

Name_____

Address_____

City_____State_____Zip_____

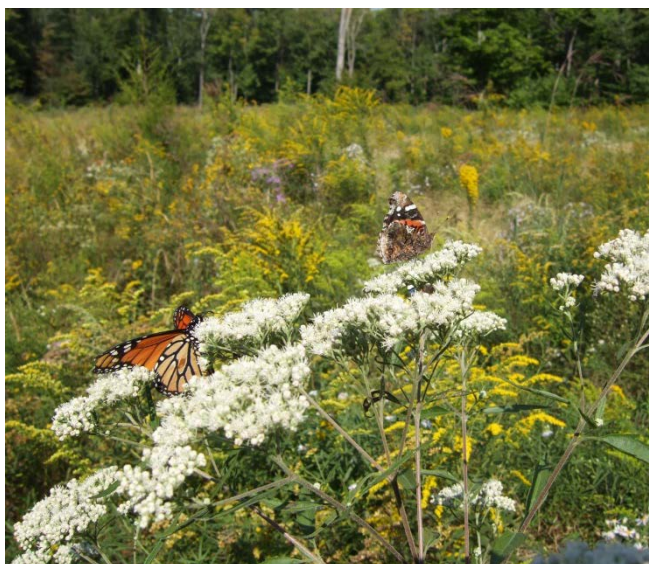
Phone ()_____

E-Mail_____

All information will be kept confidential. This information should not be constructed as tax or legal advice. We suggest you seek advice based on your own situation and can provide the contact information of an independent tax advisor should you need one.

What is the Legacy Giving Circle?

The Legacy Giving Circle honors those who have made bequests or life income gifts to The Land Conservancy of New Jersey knowing that their gifts will help protect land and water resources in the Garden State for years to come.



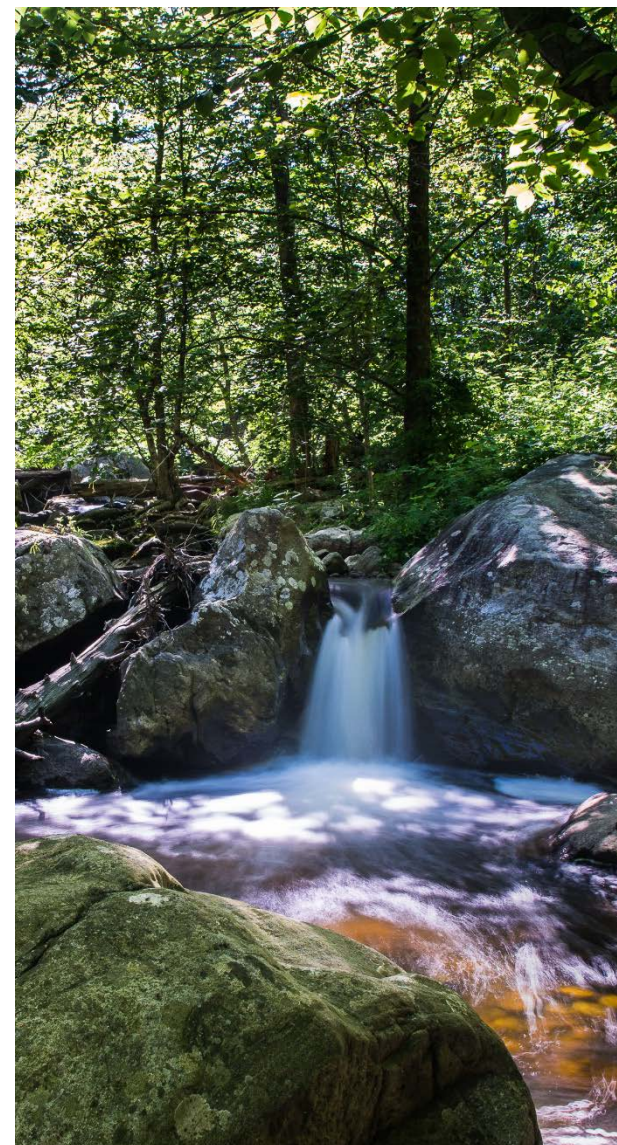
If you would like more information about the Legacy Giving Circle, or additional information on planned giving please contact:

Danielle Wolfrum
The Land Conservancy of New Jersey
19 Boonton Ave.
Boonton, NJ 07005
(973) 541-1010 x25
dwolfrum@tlc-nj.org

or visit us at www.tlc-nj.org



LEGACY GIVING CIRCLE



BEQUESTS

To make a bequest, consult your attorney to add the proposed language to your will:

General Bequest

I give, devise and bequeath to The Land Conservancy of New Jersey, 19 Boonton Ave, Boonton, New Jersey 07005, \$_____ for its general purposes (or list specific property or a percentage of the estate).

Residuary Bequest

I give, devise and bequeath to The Land Conservancy of New Jersey, 19 Boonton Ave, Boonton, New Jersey 07005, all of the rest, residue, and remainder of my estate for its general purposes.

Contingent Bequest

In the event any of my beneficiaries predeceases me or disclaims any interest in _____ (describe asset or portion of estate) I give such property to The Land Conservancy of New Jersey, 19 Boonton Ave, Boonton, NJ 07005 for its general purposes.



JOIN THE JANET ROSS FUND BEQUEST GIVING CHALLENGE!

For every supporter who names us in their will or informs us we are already named The Land Conservancy will receive \$1,000 from the Janet Ross Fund.

Help us secure immediate funding today and leave a legacy to ensure we will continue to preserve land for years to come.

LEAVE A LASTING LEGACY

Imagine the difference you can make in the lives of those that follow. A planned gift to The Land Conservancy of New Jersey can help ensure we pass our shared commitment of open spaces, clean water, and fresh air down to future generations.

BENEFITS OF MEMBERSHIP

- Your legacy will live on in the form of preserved open space and protected natural areas.
- You will receive a gift that identifies your commitment to The Land Conservancy of New Jersey.
- You will be invited to local programs and activities and you will receive mailings keeping you informed about our land conservation work.
- With your permission, we will acknowledge your support by listing your name in our publications, or you may choose to remain anonymous. In any event, the amount of your gift will never be disclosed.

Place
stamp
here

The Land Conservancy Of New Jersey
19 Boonton Ave
Boonton, NJ 07005



Help The Land Conservancy receive \$1,000 Today

Join the Janet Ross Fund Bequest Challenge and have a greater impact today and tomorrow. The Janet Ross Fund Bequest Challenge is a campaign to inspire our supporters to make bequest commitments for the future and, in return, help us earn much-needed challenge grant dollars for use today.

How It Works:

- Name The Land Conservancy of New Jersey in your will or living trust, new commitments and previously established bequest plans can qualify.
- Document your bequest on the form below and mail back to us.
- The Land Conservancy will receive a donation of \$1,000 right now!

For more information regarding the Bequest Challenge or to learn more about our generous donor visit our website at www.tlc-nj.org/planned_giving

If you have included a gift to The Land Conservancy of New Jersey in your estate plans please complete the steps below to qualify for the Janet Ross Fund Bequest Challenge.

1.) Type of Bequest:

- ☐ General Bequest
- ☐ Residuary Bequest
- ☐ Contingent Bequest

2.) Amount of bequest. My/our future gift is:

- ☐ Estimated to be worth \$ _____
- ☐ The specific amount of \$ _____
- ☐ An amount that I/we wish to keep private

3.) Contact Information:

NAME _____

ADDRESS (CITY, STATE, ZIP) _____

PHONE _____ EMAIL _____

4.) Recognition. I/We would like to be listed as follows: _____

NAME(S): _____

SIGNATURE _____ DATE _____

5.) Mail to:

Danielle Wolfrum
The Land Conservancy of New Jersey
19 Boonton Avenue
Boonton, NJ 07005

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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