

# Development for Conservation

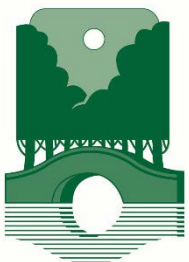
## Introduction Major Gift Fundraising

Prepared for

**Land Trust Alliance - Midwest**

February 2023

**David Allen, Development for Conservation**



**DEVELOPMENT  
FOR  
CONSERVATION**



# REVIEW



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## Revelations

Money comes from **PEOPLE**.



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## WHY??

LOVE

BUY

- Nature
- Mission
- Project
- Organization
- Asker



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



Cultivation is about **DISCOVERY**, not **SELLING**

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## 4 Paradigm Shifts

1. Fundraising is more about **discovery** than about selling
2. Focus on the **NET**
3. Major describes the **decision**, not the person
4. Plan for **WHY** a person might say **YES**, instead of imagining all the reasons they might say No



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## Major Gift Fundraising

Cultivating, soliciting, and stewarding **INDIVIDUAL** donors - treating them as individuals - is the primary differentiation between major gift fundraising and all other fundraising.



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## Mattering

For most of our lives, we focus on forms of "winning." School, sport, job/career, marriage, children, home, neighborhood, friends, social set.

But at some point we stop caring so much about whether we win and start caring more about whether we "matter."

Wanting to matter is the Mother of major giving.



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## A Major Gift Fundraising Rant

- First Thing Tuesday, May 18, 2021
- Major gift fundraising is the most important fundraising you can do.
- Period.
- *"OK, That feels better!"*



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## A Major Gift Fundraising Rant

- Major gift fundraising is about getting to know people – donors – personally.
- To the point that you know WHY they will give something extraordinary for them.
- Sometimes to the point that you know they have higher priorities elsewhere.



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## A Major Gift Fundraising Rant

- Major gift fundraising is highly correlated with **organizational resiliency**.
- Major gift fundraising is a **discipline**, and the discipline is independent of scale.



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## A Major Gift Fundraising Rant

- Major gift fundraising is valuable even if the exercise does not result in the donation of a major gift.
- Deciding to work with people as individuals changes the way donors see the organization and **changes the way we see donors.**



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*Several years ago you did a training at a Gathering Waters Conference. In the room that day I'm not sure your message reached all the land trust people, but it reached me. It took me awhile to figure out how to have individual relationships with so many different people. But, I knew I was on the right track. A track I've been following ever since. I credit you for enriching my life. Not only have the last years been good for the land trust. You wouldn't believe how far we've come since the old days! But, my own life is filled with so many good people. I can hardly keep track of them all! Instead of having a big mailing list, I have 100's of people that I care about. It makes all the difference in the world.*

-Deborah Nett

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## Step 1

Identify your donor group

Board Members  
Select individual decision-makers  
(This is scalable)



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## A Major Gift Fundraising Rant

- In a perfect world, you would know every single donor well enough to know WHY they will give something extraordinary for them.
- In the world we actually live in, there are way too many people giving money for you to actually know this personally.
- In the world we actually live in, you have to choose.



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## Here's the Group I Would Start With

- People who have made a \$1,000 gift (or more) at some point in the last 5 years
- People who gave \$250 (or more) LAST YEAR
- People who have given \$5,000 or more to other organizations
- People you know well

You are looking for 3X the number of people you want to end with



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## A Few Comments About Money

- \$100 is a common withdrawal amount from an ATM
- \$250 is \$20/month - Most people with a heartbeat can afford that
- \$1,000 is \$20/week - four trips to Starbucks



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## Step 2

Look at the last three years of giving decisions

Explain what you see  
(for each person)



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## Step 3

- Call them
- Call them again on a different day at a different time
- Call them a third time on a different day at a different time, followed immediately by an email "Trying to Reach You"
- Mail a letter or card



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## Reasons to call

- Thank you
- Personal invitation to tour a property
- Update on a specific project
- Personal invitation to an organizational event
  
- Have ready two things to share and one thing to ask



*I'd like to keep you informed about our progress. Is this the best way to reach you?*

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## Step 4

Look ahead this year and two more years

Calendar what you will ask them to give and when



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## Step 5

Formulaic Cultivation

- One personal interaction
- One group interaction
- Two spontaneous “thinking of you” messages
- One ask
- Thank You!



*80% of fundraising does not involve “asking”*

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## Cultivation

- Open House Events - Introduce to others
- Monitoring visit
- Site visits
- Coffee/lunch
- Large group events
  
- The Annual Renewal Request - annual giving is great cultivation for major giving



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## Solicitation Outline

- Preliminaries
- Introduction (Script this)
- Common Ground
- The Case for Giving
- Roles for Donors
- Ask (Script this)
- Pause
- Close



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## The Ask Words

- Would you make a gift of \$25,000?
- We'd like to ask you to make a gift of \$25,000. Could you do that?
- Would you consider a proposal for \$25,000?
- If we pull this off, can we come to you for a gift of \$25,000?
- What would you need to know before you could say yes to \$25,000?



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## Role Play

- Role play in a group setting - have everyone role-playing at the same time.
- Role play immediately prior to every Ask meeting with everyone who will be involved.



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## Guided Role Play

- What do we know about the donor?
- What are we going to ask for?
- Why will S/he say YES? How can you improve the chances?
- Who will actually say the “ask” words? Let me hear them.
- How do you expect them to react?
- What will you say then?
- What else might they say?
- What would success look like?



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## Exercise

**I LOVE my land trust because  
I believe that ...**



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## Exercise

1. Choose one person to start
2. Complete the thought in the prompt and don't stop talking for 60 seconds - help each other
3. When time is called, a second person talks from the same prompt - for another 60 seconds
4. And then the third



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## Exercise

- If you only end up with two in your group, feel free to return to the main group when you are done with the second person.



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## Exercise

**I LOVE my land trust because  
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## Exercise

- Conservation Easements are an important conservation tool because ...
- I am so excited about the \_\_\_ wetlands project because ...
- I love serving on the Board because ...
- When you visit the land it changes your perspective about conservation work because ...



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# DONOR STEWARDSHIP



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## Donor Stewardship

- Say Thank You right away.
- Make it personal. Must come from the person carrying the relationship.
- *"You made my day today!"*



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Several years ago you did a training at a Gathering Waters Conference. In the room that day I'm not sure your message reached all the land trust people, but it reached me. It took me awhile to figure out how to have individual relationships with so many different people. But, I knew I was on the right track. A track I've been following ever since. I credit you for enriching my life. Not only have the last years been good for the land trust. You wouldn't believe how far we've come since the old days! But, my own life is filled with so many good people. I can hardly keep track of them all! Instead of having a big mailing list, I have 100's of people that I care about. It makes all the difference in the world.

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## Donor Stewardship

- Donors have their own reasons for giving - **know them.**
- Donors want to feel included - **include them.**
- Donors want to know that their gifts make a difference - **show them** how they mattered.



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## On a very practical level ...

- Thank all donors within 48 hours of gift receipt (or notification)
- Know who has responsibility for carrying the relationship and let them know immediately about gift receipt (or notification)
- Let all Board members know about all extraordinary gifts as soon as they happen



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## Legacy Giving

The last gift people give you is NOT their "bequest."

It is to tell you the kind of person they were. Where they lived. What they cared about. Do the work to understand their passions.

- David Love  
"The Godfather of Good," 2018



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## Legacy Giving

Leaving a legacy isn't about leaving something **behind**. It's about leaving something **ahead** ... something that says:

*"I was here. I cared. Did what I could. This is one ever-lasting thing I want to contribute."*

-Tom Ahern



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# CAPITAL CAMPAIGNS



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## WHY??

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



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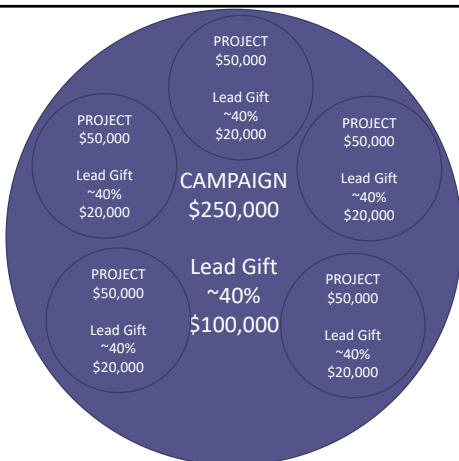
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## WHY NOT??

- RISK
- Don't know your donors that well
- Not ready
  - Not Organized
  - Missing Leadership
  - Not enough time
- All encompassing



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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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## Ballpark Budgeting

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



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# DAVID ALLEN

I am a non-profit fundraising consultant. I work with nonprofit boards and staff to help them learn how to be better leaders and advocates. I work almost exclusively with conservation organizations because that is where my heart is.

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 by providing needs 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**

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