

Development for Conservation

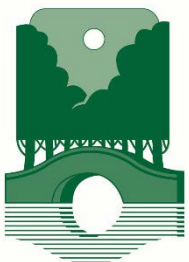
Innovative Approaches to Raising More Major Gifts

Prepared for

New York Land Conservation Summit

May 2023

David Allen, Development for Conservation



**DEVELOPMENT
FOR
CONSERVATION**

4 Paradigm Shifts

1. We are **helping donors do something important** just as much as they are helping us
2. Focus on the **NET**, as opposed to the **COST**
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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Plan for the Session

- Call Gifts
- Tridelands
- Legacy Match Campaigns



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CALL GIFTS



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The Problem

- Land is Expensive
- Conservation is even more expensive than the land
- Most land trusts don't have TIME to raise the money in between contract and closing



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Tried & True Solutions

- Building an "Opportunity" Fund
 - Could drive up the asking price of the land
 - Sets up a cycle of asking for intangible projects
- Securing a LOAN
 - Incurs carrying costs



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The Greenprint Partners Pledge Fund




A special prospectus for

*"What you do makes a difference, and you have to decide what kind of difference you want to make."
- Jane Goodall*



Call Gifts

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

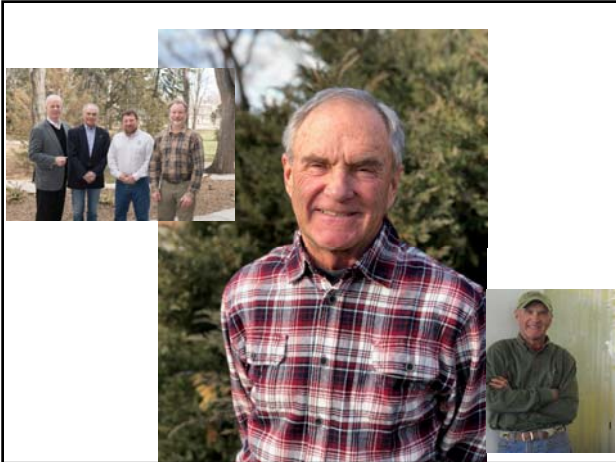


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TRADELANDS



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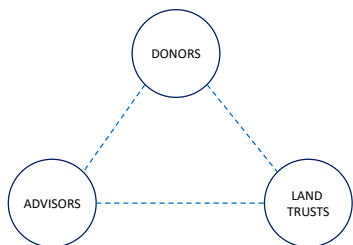


Gift of Real Estate - Tradeland

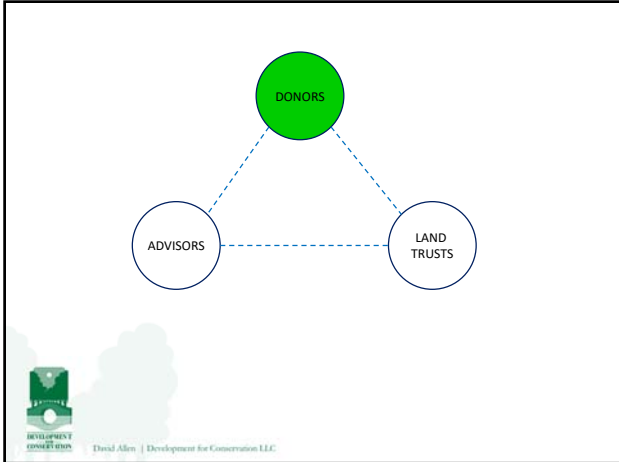
- 1,500 square foot Single Family Home, rented to CSU students
- \$360,000 appraised Value;
\$135,000 mortgage
- Needed radon and mold mitigation, paint, several significant repairs – total ~ \$35,000-40,000
- Tate wanted money split between four charities

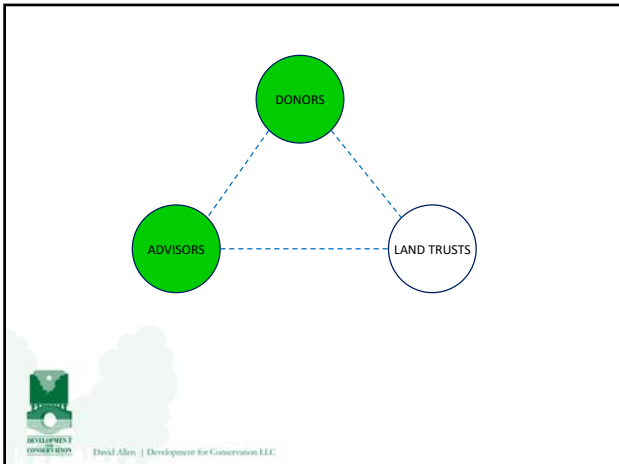


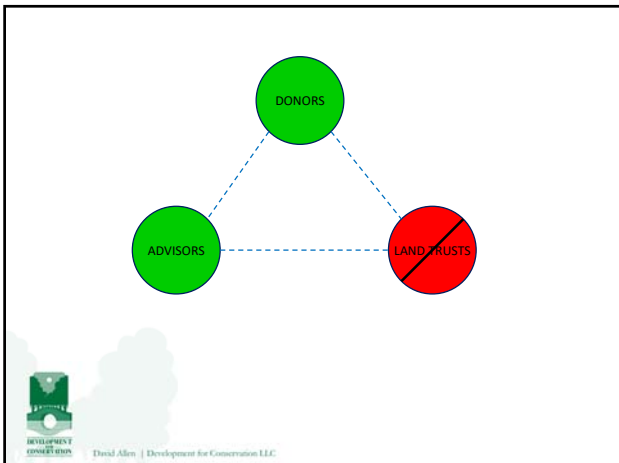
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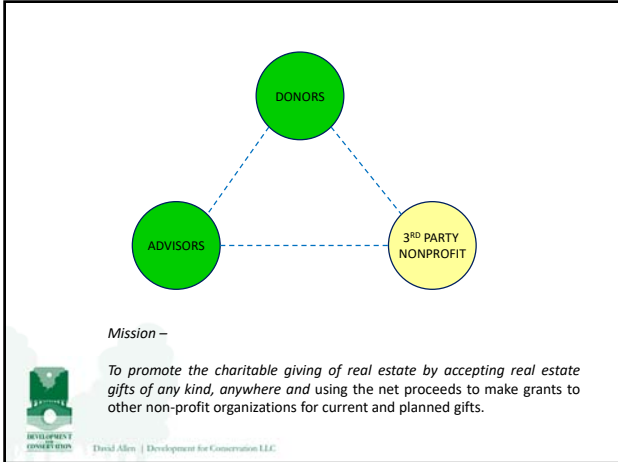


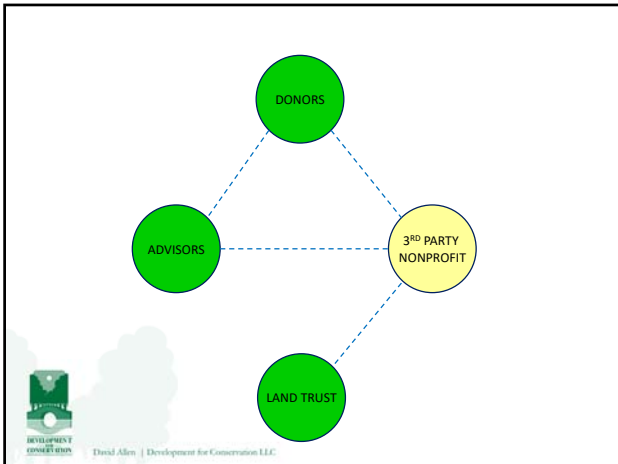
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Gift of Real Estate - Tradeland

- 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 CAMPAIGN



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An estimated \$68 Trillion will transfer from Boomers to **Gen-Xers and Millennials** between now and 2030



Source:
Forbes

Essential Concepts

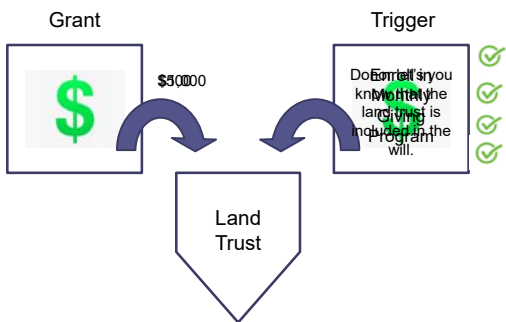
- If you are not actively involved building major gift and planned gift development programs right NOW, you will miss out on some or all of this transfer.





Essential Concepts

Matching Gifts



Program Considerations

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



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CONSIDERATIONS

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Bequest Distribution Policy

- Restricted Gifts
 - Honor the Restrictions
 - Reserve the right to apply up to 20% to administer the gift
- Unrestricted Gifts (D4C Suggestions)
 - 65% to Endowment
 - 25% to Discretionary High Risk / High Reward Projects
 - 10% to Planned Giving Marketing Programs



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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 \$60,000
 - A campaign that generates 20 planned gift notifications represents about \$1.2 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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Sample Campaigns

- Mississippi Valley Conservancy

Home / Ways to Give / Stewardship Circle Bequest Challenge

Stewardship Circle Bequest Challenge

[\\$1,000 match will be donated when you sign up](#)

You have an [amazing opportunity](#) to expand the work of protecting, caring for, and restoring our unique and beautiful Driftless Area for the benefit of everyone. With the help of long-time conservation partners like you, nearly 24,000 acres of prairies, forests, wetlands, streams, and farm land, are being cared for and restored for birds, bees, turtles, and future generations.

But this isn't enough.

To prevent loss of land our furry and feathered friends depend on for shelter and food, and tackle the effects of climate change, together, we must protect more land and care for it in a way that builds resilience for the plants and animals that depend on the land to survive.

To help ensure food and shelter will be here for plants and animals, as well as for generations to come, we invite you to join our Stewardship Circle. The Stewardship



The Stewardship Circle

The Stewardship Circle is a special group of land conservancy supporters who have made a lasting

Sample Campaigns

- The Land Conservancy of New Jersey

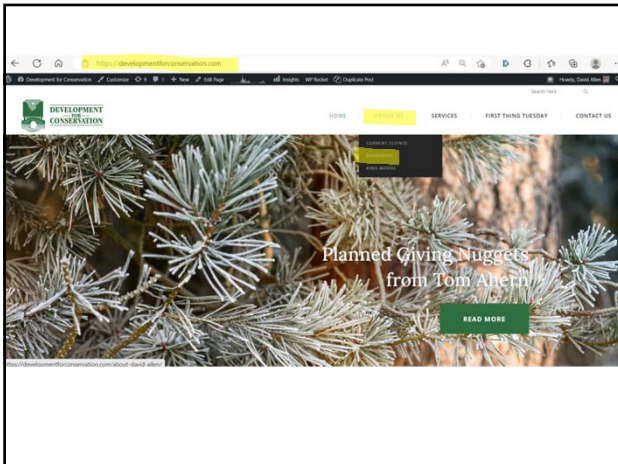


Help The Land Conservancy receive \$1,000 Today

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.lc-nj.org/planned_giving*



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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