

Development for Conservation

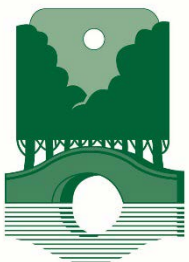
Fundraising 101 Fundraising Planning

Prepared for

Texas Land Trust Council – 2024

February 2024

David Allen, Development for Conservation



**DEVELOPMENT
FOR
CONSERVATION**

Start Here

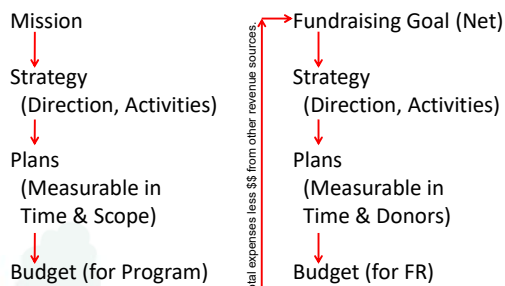


How much do we need to raise?



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Strategic Planning



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Charitable Giving Segments

- Individuals
 - Board Members 10-20%
 - Annual Giving Leaders (\$250+ - unrestricted) 45-65%
 - Donors 15-30%
 - Lapsed Donors 2-6%
 - New Donors 0%
- Businesses 5-10%
- Foundations 5-10%



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Charitable Giving Segments

- Individuals
 - Board Members 10-20% \$ 50,000
 - Annual Giving Leaders (\$250+ - unrestricted) 45-65% 300,000
 - Donors 15-30% 75,000
 - Lapsed Donors 2-6% 25,000
 - New Donors 0%
- Businesses 5-10% 25,000
- Foundations 5-10% 25,000
\$500,000



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One Important Premise

- The average land trust donor is 66-67 years old. This average hasn't really changed much in many years.
- 75% of our donors are Boomers and Silents. 25% are Gen X and Millennials. This IS changing.



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A Dozen General Planning Principles

#1

Raise money from people who gave you money recently

Prospecting rarely produces a positive – invest in new donor recruitment to increase future fundraising capacity



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#2

Asking for a specific amount will always
result in a better outcome

Generally ask for an upgraded amount from last
year, but have a short memory

4:1 is not prescriptive, it's a maximum



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#3

The more bespoke the ask, the better the
outcome

Tailor each ask to the reasons you believe the
donor will say yes



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#4

Donors of a feather ...

Create opportunities for people with common
experience to meet each other
Donor Circles, Monthly Donors, Birders ...



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#5

Renewal is a sequence – Use descending amounts

Look for 70-75% overall; 80-85% with first renewals removed



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My Recommended Named Thresholds

- \$1 - 264 Member
- \$365 - 999 Everyday Steward
- \$1,000 - 9,999 _____ Guardian
- \$10,000 - 24,999 _____ Society
- \$25,000 Conservation Angels

(per year)



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#6

Campaigns have specific goals
(Giving Tuesday)

Campaigns for specific
programs/project/outcomes
will help increase five-year values



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#7

Emotional appeals raise more money than intellectual appeals

Tell stories and use the stories to illustrate larger principles, ideas, and beliefs



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#8

Ask some people individually, as you would a foundation

This starts with the Board – ask them individually



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Scalable - start now and start small

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#9

Most money will come from those giving \$250 or more



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#10

There's no reason why people can't be asked to give several times each year

Renewal
Special Campaign
Gala / FR Event



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#11

Monthly Giving is DIFFERENT than Annual Giving

Ask immediately after people renew



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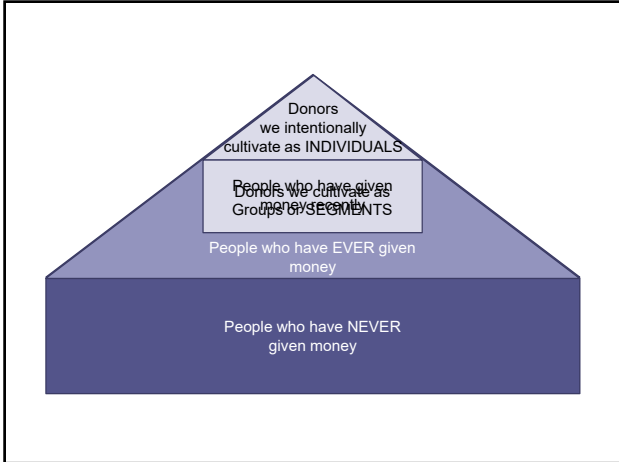
#12

Make giving SIMPLE

Simple design / Easy on older eyes
Convenience envelopes
Multiple landing pages




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Planning Exercise Step 1

SET A GOAL


Based on current program needs and strategic projections



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Planning Exercise Step 2

- Make a spreadsheet list of every donor from 2023.
- Create columns for cumulative giving in 2021, 2022, and 2023, and a new column for 2024.
- Assign ask amounts for 2024.
- Sum the 2024 column and multiply by 80%.



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Planning Exercise Step 3

- Make a spreadsheet list of every donor from 2022 who did not give in 2023.
- Create columns for cumulative giving in 2021, 2022, and 2023, and a new column for 2024.
- Assign ask amounts for 2024.
- Sum the 2024 column and multiply by 50%.
- **Will that be enough?**



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Planning Exercise Step 4

- Bring all Board members and **20** other prospects to the top of the spreadsheet.
- 80% of the sum of the Board asks will be a "Board Goal" - how will they be asked?
- For the other 20, plan for dates, askers, why they will say YES, and cultivation contacts between now and then.
- **Will that be enough?**



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Strategic Questions

WHAT will you ask for?

WHY will they say YES?
(for each person)

WHO Needs to be involved?

WHAT will they see from us that supports
their reasons for saying YES?

WHEN?



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What does it look like?

- **February** - Send update on the 2023 restoration plans for the Beckett property; offer a tour of the site
- **April** - Personal invitation to the birding field trip
- **July** - Personal invitation to the Presidents Reception
- **October** - Send current newsletter with personal note on renewal next month
- **November** - Request for renewal at \$1,500
- **December** - Personal Thank you call



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Planning Exercise Step 5

- Group (segment) the rest of the donors
 - By 2023 giving amount
 - By 2024 ask amount
- OR
- By affinity (includes event or volunteer participation)
 - By first gift source
 - By longevity



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Fundraising Activities

- Events
 - Annual Gift (Membership) Campaigns
 - Major Gift “Advancement” activities
-
- Planned Giving Mailing



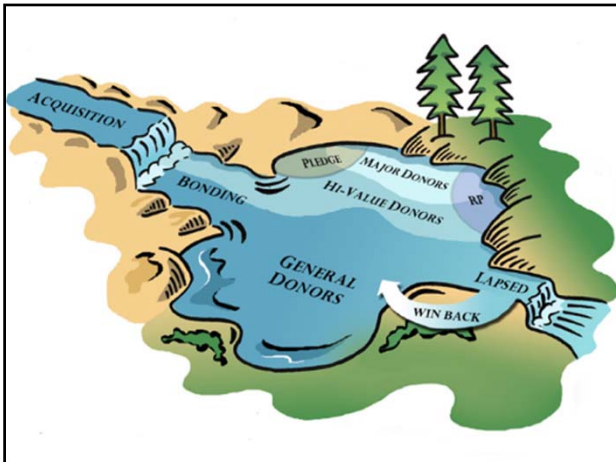
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Fundraising Activities

- Events
- **Annual Gift (Membership) Campaigns**
 - Recruitment
 - Renewal
 - Donor Circles
- Major Gift Development
- Planned Giving



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Recruitment Strategies

- Direct Marketing
- Passive Marketing
- Engagement Events
- Tabling



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How Much Does it Cost?

Every organization will be different, but it can cost from

\$80-400

to recruit each new member on average.



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2018 Data – 38 organizations

- NEW MEMBERS

\$ 999 – Average 5-Year-Value per donor

\$1,035 – Average 5-Year-Value per Org

\$ 794 – Median 5-Year-Value per Org

Range = \$180 - \$6,000+



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2018 Data – 38 organizations

- NEW MEMBERS

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What are we learning?

- That organizations dependent on electronic communication for recruitment are not achieving high 5-year-value.
- That having a project you can raise money for matters – it attracts new members, helps with retention, and raises the 5-year-value.



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The Five-Year Black Box



3 Things Every Board Member Can Do

1. Recruitment/Renewal -
Host an Engagement Event every year
2. Renewal -
Make Thank-You Phone Calls
3. Major Gifts -
Adopt a small set of Individual Prospects to cultivate



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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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David@DevelopmentForConservation.com

608-239-5006

608 West Dean Avenue
Madison, WI 53716

www.DevelopmentForConservation.com