

Development for Conservation

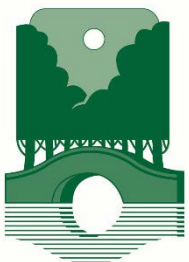
Capital Campaigns Can Be Fun!

Prepared for

WeConservePA Conference – 2024

April 2024

David Allen, Development for Conservation



**DEVELOPMENT
FOR
CONSERVATION**

Outline for the Session

- Review Premises
- Fundamentals of a Major Gift Development Program
- Capital Campaigns: Why and Why Not
- Feasibility
- Budget
- Conclusions and Takeaways

Opening Premises

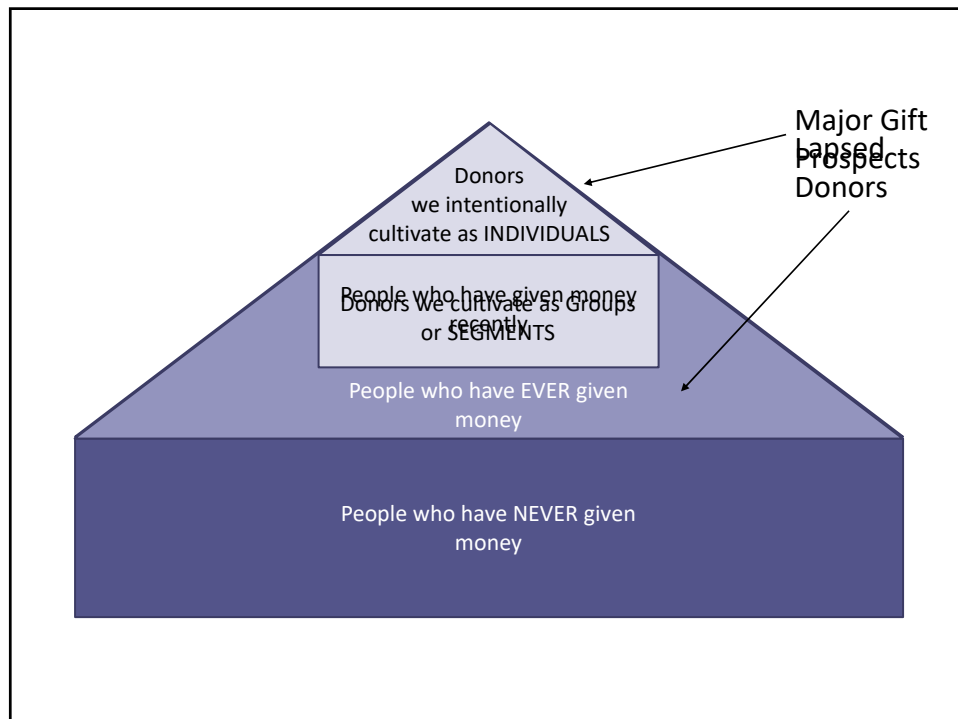
People give money to organizations because the organizations are doing something they already want to see done – not because they are “sold”

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.**



Major Gift Fundraising

- 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.

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.

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. “**WHY** will they say **YES?**”
instead of “Why will they say No?”

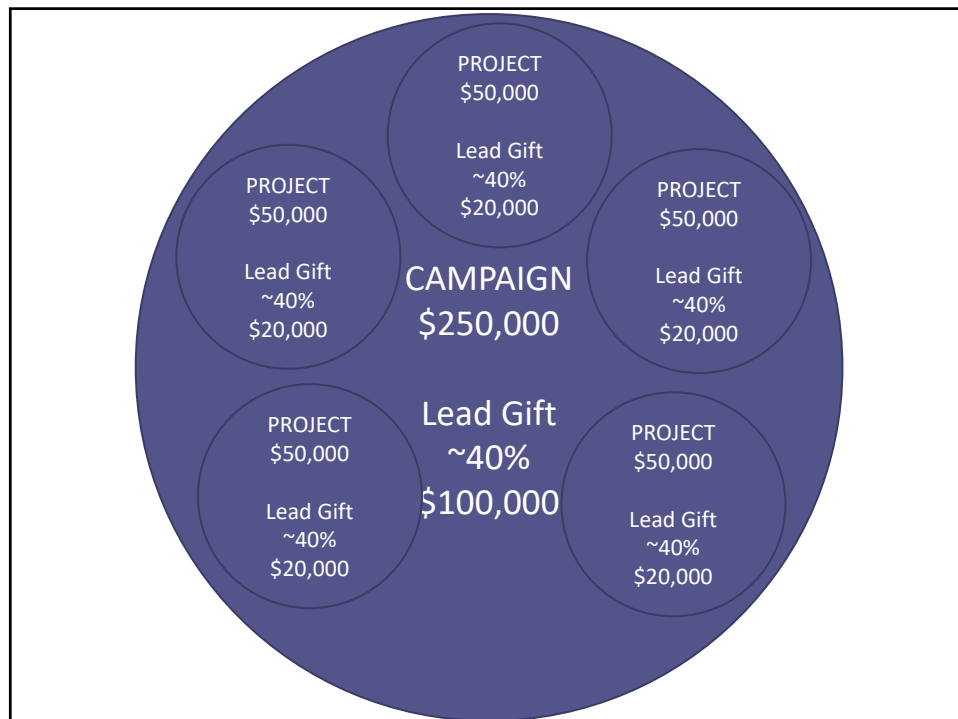
Building Blocks of a MG Program

- Regular Screening
- Process for donor qualification
- Good record-keeping
- Peer involvement
- Small project fundraising

- Project Campaigns
- War-chest fundraising
- Endowment fundraising

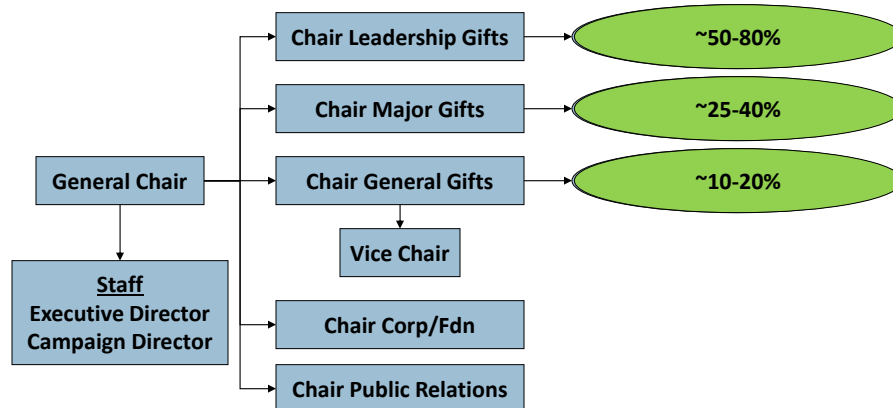
The Basics

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



Planning Considerations

Campaign Executive Committee Structure



Gift Table

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

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>
Total for Leadership Gifts	6	20	\$1,400,000

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WHY??

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

WHY NOT??

- RISK
- Not ready
 - Not Organized
 - Missing Leadership
 - Not enough time
- All encompassing

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”

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

Products

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

Back of the Envelope FS

- If you raised 20 times your most successful year ever, would that be enough?
- Can you name five people you could credibly ask for 25% of the goal amount?
- Will your board members all give to the campaign *in addition* to the money they already give?

Ballpark Budgeting

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

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

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