

Development for Conservation

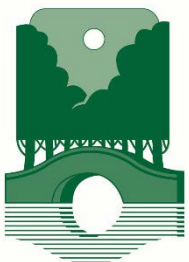
Tools for Shifting Board Culture in Favor of Fundraising

Prepared for

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David Allen, Development for Conservation



**DEVELOPMENT
FOR
CONSERVATION**

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.

Share with Us

How are your board directors participating in fundraising now?

Reality Check

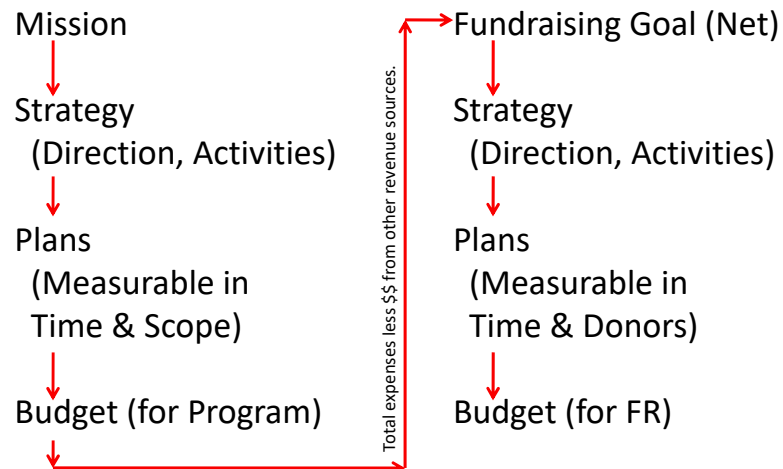
- Changing Board culture is HARD
- It takes:
 - Leadership
 - Communication
 - Time

Start Here



How much do we
need to raise?

Strategic Plan



Job Description

- Be active, thoughtful, and candid
- Serve on at least two committees and come to all meetings fully prepared to participate
- Make a significant gift each year
- Build important relationships with individual, corporate, foundation, and agency funders
- Advocate for the LT back into their communities
- Serve as official ambassadors at events

Roles Board Members Play

- Ambassadors
 - Hosts, Door openers
 - Build relationships
- Advocates
 - Topical Experts
 - Make the case (formal and informal)
 - Recruit other volunteers
- Askers
 - Closers, call the question, make the ask

The Telephone



- CALL Every donor after Every gift
- Use an index card - One side with a message script; one side with current talking points
- Call with invitations
- Call with News

Current Donor Screening



Screening

- Who do you know?

★ Who gives money?

B Who would make a good board member?

NAME

A - I know this person really well

B - I know this person; I have met them

C - I know OF this person

Larry

Jon

Michael

Tim

Mike

Karl

A	B	C

Donor Relations Committee

What do Donor Relations Committees do?

- Plan for and monitor organizational relationships with members and donors
- Manage and coordinate the donor engagement work of Board directors.
- Create training and practice opportunities
- Ensure that the fundraising activities are funded (budgeted) adequately to be successful

Focus on Practice and Training

Carve 20 minutes out of four Board meetings every year for a Fundraising Activity

- Phone calls
- Planned Giving Training
- Roleplay
- Donor Screening
- Lift Notes
- Engagement Event Planning
- Peer Learning



Engagement Events

Examples

- Field Trips
- Library Lectures
- Project tours
- Volunteer projects
- Living room get-togethers
- Backyard BBQs
- Networking events

The collage features three distinct scenes: a lush garden with various plants and pumpkins, a large indoor lecture hall with an audience seated at tables facing a screen, and a table covered with a blue cloth, set with a pink and white checkered tablecloth and various items, likely for a backyard BBQ.



Appreciation Events

The collage features two scenes: a man and a woman wearing Santa hats standing in a field of sunflowers, and a group of people kayaking on a river.

“Start small, start now. This is much better than, ‘start big, start later.’ One advantage is that you don’t have to start perfect. You can merely start.”

Seth Godin via The Agitator



Creative Disruption

- Term Limits
- Cancel ineffective FR Committees for 6-9 months; regroup with a fresh Charter
- Donor Relations Committee as Committee of the Whole for 1 year

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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