

Development for Conservation

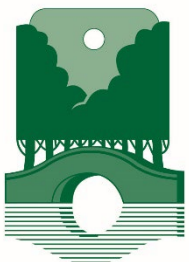
Strategic Fundraising Planning

Prepared for

Pennsylvania Land Conservation Conference

April 2026

David Allen, Development for Conservation



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AGENDA

- Session I
 - Planning Questions and Key Concepts
 - Charitable Giving Segments
 - General Planning Principles
 - Five Fundraising “Systems”
- Session II
 - Detailed Planning for Each Giving Segment
 - Final Plan Construction



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Most Important Planning Question

Five years from now:

If your organization was doing the work it needs to do in your community,

- How much money would you need to raise every year? AND
- How much money would you need in capital funds?



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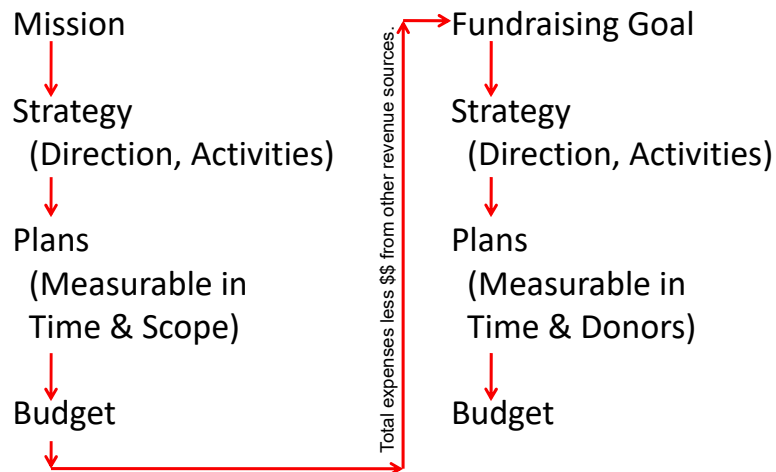
Key Planning Concept

- The money you need to raise is for conservation, not for fundraising
- *So, take the fundraising expenses OUT of your organizational budget during planning*
- Your fundraising plan should deliver a specific NET result after expenses
- Fundraising expenses should be calculated separately



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Strategic Planning



Key Planning Concept

- Marketing and Outreach should also be budgeted separately
- If Marketing and Outreach activities are designed to build your donor base, they should be evaluated that way



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Charitable Giving Segments

- Individuals
 - Board Members 10-20%
 - Giving Leaders 45-65%
(\$250+ - unrestricted)
 - 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
– Giving Leaders (<i>\$250+ - unrestricted</i>)	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%	<u>25,000</u>
		\$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 – the fences are moving.



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A Dozen General Planning Principles

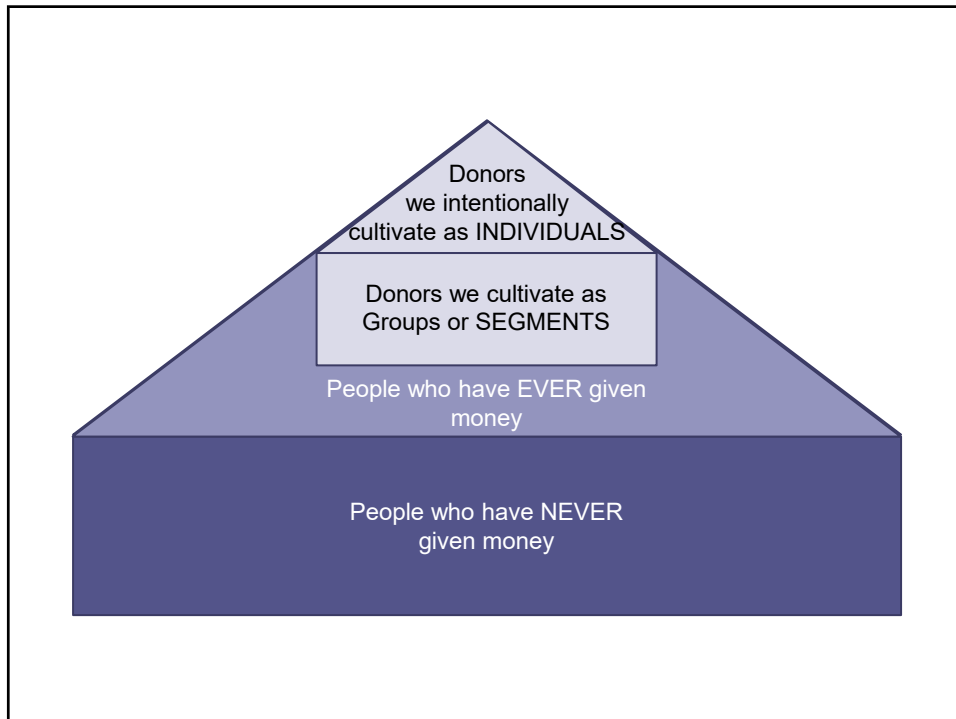
#1

Raise money from people who gave you money recently

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



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A Dozen General Planning Principles

#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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A Dozen General Planning Principles

#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% renewal rate 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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A Dozen General Planning Principles

#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 (January)



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#12

Make giving SIMPLE

Simple design / Easy on older eyes

Convenience envelopes

Multiple landing pages



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Revelations

Money comes from PEOPLE.



Revelations

*We don't need donors to think like WE do.
We need to learn to think like THEY do.*



Five Fundraising Systems

1. Recruitment (Marketing)
2. Annual Renewal (Membership)
3. Annual Giving Leadership (Giving Circles)
4. Major Giving (Specific program, project, or outcome)
5. Planned Giving (Bequests, annuities)

Five Fundraising Systems

1. Recruitment (Marketing)
"Produces" New Donors
2. Annual Renewal (Membership)
"Produces" New \$250 Donors & 70% Retention
3. Annual Giving Leadership (Giving Circles)
"Produces" Major Gift Prospects & 60-80% \$\$ Raised
4. Major Giving (Specific program, project, or outcome)
"Produces" Project Funding
5. Planned Giving (Bequests, annuities)
"Produces" Endowment Funding



For Every Year Money

Plan and Measure Activities for Audiences

(Not the other way around)



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OPERATIONS FUNDRAISING	Renewals	Letter Appeals	Calls	Visits	Special Events	Proposal Requests	GOALS
Board Members							
Major Gift Prospects							
Annual Giving Leaders / Mid-Level							
Other Individual Donors (in Ask Tiers)							
Corporate/Business							
Foundations							
Goals							
Expenses – Time & Money							
Net Results							

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 2025.
- Create columns for cumulative giving in 2023, 2024, and 2025, and a new column for 2026.
- Assign ask amounts for 2026.
- Sum the 2026 column and multiply by 80%.
- **Will that be enough?**



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Planning Exercise Step 3

- Make a spreadsheet list of every donor from 2024 who did not give in 2025.
- Create columns for cumulative giving in 2023, 2024, and 2025 (\$0), and a new column for 2026.
- Assign ask amounts for 2026.
- Sum the 2026 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 2025 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 2025 gift amount
- By 2026 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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Renewal Formula Ask String

- What they gave last year
- The 2026 Ask Amount (Anchor Amount)
- One amount more than the Ask
- Two amounts more than the Ask
- Other

Anchor Ask Amount

EXAMPLE

__ \$50 __ \$100 __ \$250 __ \$365 __ Other



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My Recommended Ask Values

\$35	\$100	\$250
\$365	\$500	
\$1,000	\$2,500	\$5,000
\$10,000	\$20,000	\$25,000



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One Alternative

\$60	\$120	\$240
\$365	\$600	
\$1,200	\$2,400	\$5,000
\$10,000	\$20,000	\$25,000



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Charitable Giving Segments

- Individuals
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Reminders About Membership

- Membership is a language
- Membership “levels” are best considered ranges (with a threshold amount) rather than fees
- Very few levels should be named, and those that are (Donor Circles) should be strongly branded
- Members should be promised paper information, invitations to engage, and little else



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Recruitment Strategies

- Direct Marketing
- Passive Marketing
- Engagement Events
- Tabling



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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 more than 35 years working in membership fundraising, major gift development (including capital campaigns), 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.**

Most of my consulting work is related to fundraising, but I also help conservation organizations with strategic planning, Board training, and governance. 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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