

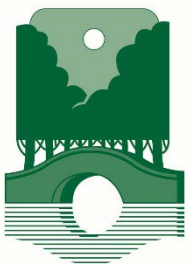
Development for Conservation

Strategic Planning for Fundraising

Presented to

Conservation Excellence

22 March 2017



DEVELOPMENT
FOR
CONSERVATION

Agenda


- Introductions
- Strategic Planning – the Basic Process
- Two Fundraising Goals
- Where Money Comes From – Segmenting
- How Money is Raised – Solicitation Activities
- The Planning Matrix
- Strategic Options – A Discussion
- Individual Exploration
- Conclusions and Takeaways



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The Essential Planning Process

1. Where are we now?
2. Where are we going?
3. What are the options for getting there?
4. Prioritize – Make choices
5. Resources – Budget



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Strategic Planning

Mission

↓

Strategy
(Direction, Activities)

↓

Plans
(Measurable in
Time & Scope)

↓

Budget

Fundraising Goal

↓

Strategy
(Direction, Activities)

↓

Plans
(Measurable in
Time & Donors)

↓

Budget


Total expenses less \$\$ from other revenue sources



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Two Goals


- Capital Goal – How much do we need to raise in one-time, restricted funds for specific programs or projects?
- Operating Goal – How much will we need to raise **every year** in unrestricted funds by the fifth year of the Plan?



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Three Strategies

- More donors
- More donors giving \$1,000 and more every year
- A small number of donors selected for major gift cultivation



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Show Me the Money

- Government Grants
- Mitigation
- Investments
- Selling Stuff
- Charitable Gifts (Fundraising)



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Charitable Giving Segments

- Foundations
- Businesses
- Individuals



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Charitable Giving Segments

- Foundations
 - Public Foundations
 - Family Foundations & Donor Advised Funds
 - Corporate Foundations
- Businesses
- Individuals



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Charitable Giving Segments

- Foundations
- Businesses
 - Decisions are made by one person (owner?)
 - Decisions are made by a committee
- Individuals



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Charitable Giving Segments

- Foundations
- Businesses
- Individuals
 - Board Members
 - Major Gift Prospects
 - Annual Giving Leaders
 - Donors
 - Lapsed Donors
 - Non-Donors



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Charitable Giving Segments

- Foundations
- Businesses
- Individuals
 - Board Members
 - Doug
 - Mary
 - Carol
 - Tom
 - Major Gift Prospects
 - Annual Giving Leaders



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Solicitation Activities

- Annual Gift Renewals
- Appeals
- Giving Clubs
- Events
- Project or Program Grant Requests
- "Give" Days
- In-Kind (Non-Cash and Donated Services)
- Planned Gifts




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Planning Matrix	Annual Renewal	Giving Club Ask	Appeal Letters		Events			Program Grants	TOTALS
			Spring	Fall	Golf	Banquet	Field Trips		
Individuals									
Board		✓			✓	✓			
Major Gift Prospects	✓	✓		✓				✓	
Annual Giving Leaders		✓	✓		✓	✓			
Donors	✓		✓	✓		✓	✓		
Lapsed Donors	✓		✓	✓		✓	✓		
Non-Donors			✓	✓			✓		
Foundations								✓	
Businesses					✓	✓		✓	
TOTALS									

Planning Matrix	Annual Renewal	Giving Club Ask	Appeal Letters		Events			Program Grants	TOTALS
			Spring	Fall	Golf	Banquet	Field Trips		
Individuals									
Board		18,000			5,000	2,500			25,500
Major Gift Prospects	500	12,000		22,000				50,000	84,500
Annual Giving Leaders		70,000	10,000		8,000	2,200			90,200
Donors	33,000		8,500	12,500		6,100	1,500		61,600
Lapsed Donors	4,000		800	800		250	150		6,000
Non-Donors			400	1,300			600		2,300
Foundations								75,000	75,000
Businesses					20,000	15,000		5,000	40,000
TOTALS	37,500	100,000	19,700	36,600	33,000	26,050	2,250	130,000	385,100

Three Strategies

- More donors
- More donors giving \$1,000 and more every year
- A small number of donors selected for major gift cultivation



More Members = Marketing

- Direct Mail
- Direct Contact (in person, telephone)
- Email
- Social Media
- On-Line – People find us
- Table/Booth
- Member-get-a member campaigns
- Gift Memberships
- Door-to-door
- Other?



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Are any of these strategies scalable enough?

More \$1,000 – Giving Clubs

- Branded, Marketable Name
- Printed Materials
- Signature Event
- Solicitation Strategy
- Starter Set of Donors



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Solicitation Strategy

- “Special Appeal” Mail
- Handwritten letters
- Personal visits
- Director involvement




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Connections

- People who have a known interest in what we're doing, OR
- People who should have an interest in what we're doing

AND


- People we have access to



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The Donor Pipeline


- A. Donors who are ready to be asked
- B. Donors with a known interest in a specific program, project, or *outcome*
- C. Donors who are warming to the organization and mission
- D. Donors we are connected to but really don't know yet
- E. Donors we are not connected to



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Individual Exploration

- 1. Where does your organizational money come from now?**
- 2. If you needed to double it in the next five years, what are you doing that is "scalable"?**
- 3. What will you need to do differently?**



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Planning Matrix											
		Annual Renewal	Giving Club Ask	Appeal Letters		Events			Program Grants		TOTALS
				Spring	Fall	Golf	Banquet	Field Trips			
Individuals											
	Board		✓			✓	✓				
	Major Gift Prospects	✓	✓		✓				✓		
	Annual Giving Leaders		✓	✓		✓	✓				
	Donors	✓		✓	✓		✓	✓			
	Lapsed Donors	✓		✓	✓		✓	✓			
	Non-Donors			✓	✓			✓			
Foundations											
	Businesses					✓	✓		✓		
TOTALS											

DAVID ALLEN

I am a non-profit organizational development consultant. I work with organization boards to help their members learn how to be better leaders and advocates.

My background includes 30 years working in membership fundraising, major donor 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 donor development trainer.



In 2000, 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 2002 to ask whether I would be interested in teaching a seminar for Wisconsin land trusts on major donor development. From 2002, 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 Peter McKeever and Nancy Moore to form Conservation Consulting Group. Together we help land trusts prepare for accreditation by providing assessment, 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
- Staff/Board Training and Development
- Major Gift Coaching
- Capital Campaigns

Organizational Development

- Strategy Development
- Practice & Process Assessment
- Problem Solving Facilitation
- Marketing

David Allen

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