



CONSERVATION
CONSULTING GROUP

Really, Another Plan? How to Make Fundraising Planning Fit

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Conservation Consulting Group

- Founded in 2009 as a partnership of colleagues/friends
- Strategic Planning
- Needs Assessments
- Guided Organizational Assessments
- Board/Governance Development
- Accreditation Preparation



Conservation Consulting Group

Nancy Moore, Managing Partner

- More than 35 years of experience in nonprofit leadership and management
- Nonprofit consultant for 17 years
- Senior Examiner for *Illinois Performance Excellence*
- International adventure travel Expedition Leader
- Elected member of the Monona City Council

David Allen, Partner

- 30 years raising money by asking
 - 13 with TNC Chapters in OR, TX, and WI
 - 10 with Sand County Foundation
- Membership Systems to \$18MM Capital Campaign
- Consulting PT since 2004; FT since March 2009



American Farmland Trust

Jennifer Fusco, Senior Director of Development, Northeast

- 18 years as a frontline fundraiser working with individual donors
 - Higher education (Bryant University 10 years, including a \$45M campaign)
 - National land conservation (Land Trust Alliance 4 yrs., including a \$40M campaign)
 - National farmland conservation (American Farmland Trust- current position since Jan 2017)
- 10 years of land trust board service with Westerly Land Trust in Westerly, RI- accredited in 2017
 - Serve on Development, Membership, and Governance committees
 - Organize and produce 1 high-end fundraising event annually- our Farm Dinner
 - Personally solicit donors



Land Trust Standards & Practices

Standard 5: Fundraising

C1: Fundraising Plan

“Develop and implement a fundraising plan or program appropriate to the land trust’s size and scope to secure adequate support for its activities”



Calendar vs. Plan

Calendar:

a system for fixing the beginning, length, and divisions of the civil year and arranging days and longer periods of time; a *linear*, orderly list

Plan:

a method for achieving an end; a detailed formulation of a program of action; a ***map***



Why Plan?

Land trusts that raise money intentionally, based on specific goals, generally raise more money and are therefore more sustainable

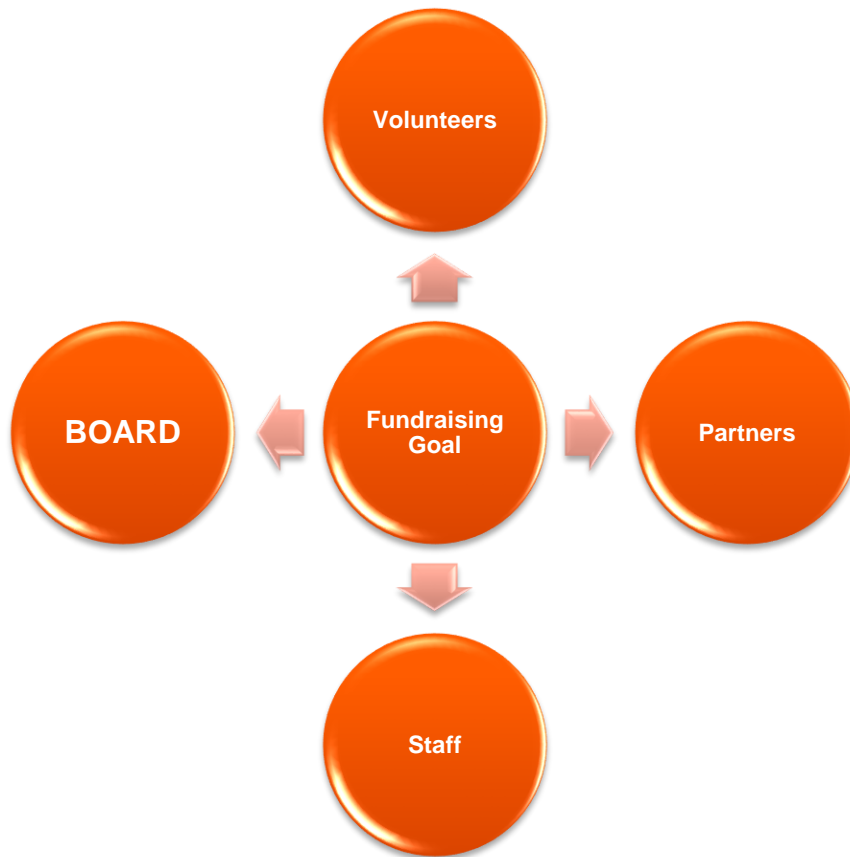
Strategic funding initiatives (e.g. membership building, capital campaigns, major donor development), like land deals, span more than a year, take longer to generate a return. If you don't have a *map* you are likely to get lost!



Generating Resources from Multiple Sources



Requiring Choreography!



***If you want to go fast,
go alone***

***If you want to go far,
go together***

- African Proverb

Steps to an Effective Plan

1. Set Goals
2. Building Your Budget: Operations + Projects/Programs
3. Identify and Map Activities by Prospect Segment
4. Identify Real People & Specific \$\$ Potential by Each Segment
5. Calendar
6. Focused execution:
 - Active *listening* and targeted/clear messaging
 - Cultivation activities that touch, *move* and inspire
 - Specific asks
7. Measure progress and adapt/adjust

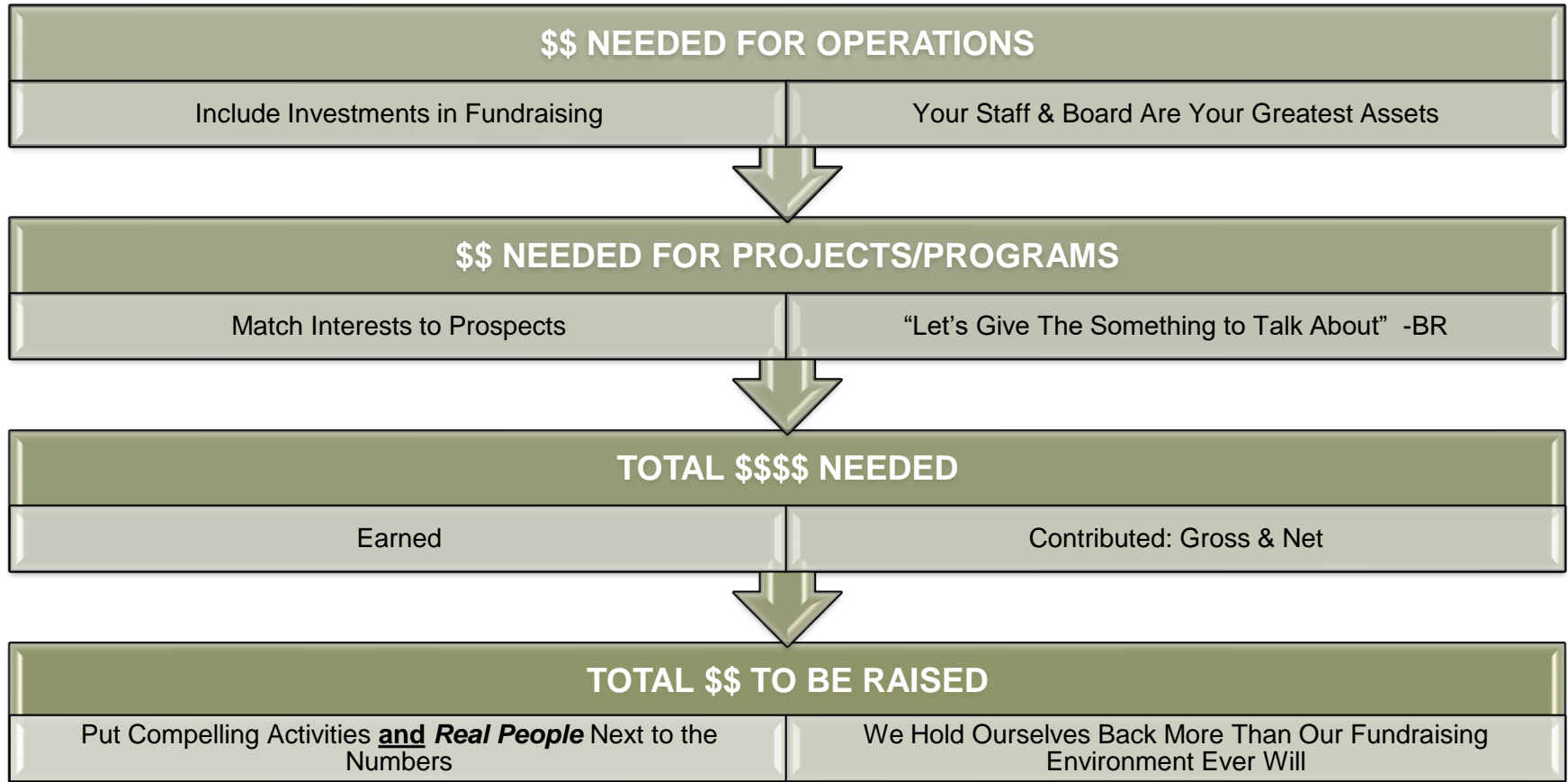


Setting Fundraising Goals

- The last step in your Strategic Planning
- Set Program (mission-driven) Goals *first*
- How much will it cost to accomplish our Program goals & sustain operations over the next 5 years?
- How much do I need to raise (net *and* gross) in year one?



Building Your Budget



Sample Expenses/Projections

Land Trust 2018 Expenses				
	2017 Actual	2018 Proposed	2018 Increase Needed	
Operational Expenses	\$155,000	\$158,000	\$3,000	
Conservation Expenses	\$78,000	\$105,000	\$27,000	
Events Expenses	\$10,000	\$11,000	\$1,000	
Totals	\$243,000	\$274,000	\$31,000	
Land Trust 2018 Fundraising Projections				
	2017 Actual	2018 Goal	2018 Increase Needed	Total Planned Solicitations
Corporate/Business	\$20,000	\$25,000	\$5,000	\$40,000
Foundation grants	\$35,000	\$35,000	\$0	
Government grants	\$25,000	\$25,000	\$0	
Major Events	\$20,000	\$25,000	\$5,000	\$25,000
Membership/Annual Appeals (1 - \$999)	\$48,500	\$52,500	\$4,000	\$75,000
Individual Major Donors (\$1,000+)	\$100,000	\$117,000	\$17,000	\$175,000
Totals	\$248,500	\$279,500	\$31,000	\$315,000

Map of Activities - Sample

Prospects/ Donors	Annual Gift Renewals	Special Appeals	Giving Day	Gala	A-Thon Events	Project Grants
Board Members	Personal ask from Board Chair in February followed by 1-2 letters	Only around Project Campaigns; Board members get the Fall appeal FYO only	Email requests/reminders to include the LT in their Giving Day activity	Asked to sponsor tables; individual participation is explicitly included in their annual gift	Invited to participate; participation is explicitly included in their annual gift	Individual prospects matched to projects/programs for major gifts
Major Gift Prospects	Personal asks in the Fall (as many as possible), followed by 1-3 letters	Spring appeal only unless a major gift is imminent	Email requests/reminders to include the LT in their Giving Day activity	Personally asked to come by a Board member, may be comped	Invited to participate as may be appropriate	Individual prospects matched to projects/programs for major gifts
Annual Donors (Members)	1-5 renewal letters timed around the anniversary of their membership gift	Spring appeal of Fall appeal timed to be opposite of their membership renewal	Email requests/reminders to include the LT in their Giving Day activity	Invited to attend	Invited to participate	
Lapsed Donors	1-5 renewal letters timed around the anniversary of their membership gift	Spring appeal and Fall appeal; if they give it re-establishes their giving month	Email requests/reminders to include the LT in their Giving Day activity	Invited to attend	Invited to participate	
Non-Donors (Recruitment)		Special letter asking them to become a member			Invited to participate via viral media	
Businesses	Personal ask for Business Membership timed around the anniversary of their membership gift		Email requests/reminders to include the LT in their Giving Day activity	Many are asked to sponsor; some are personally asked to come by a Board member	Invited to sponsor as appropriate	Personal visit/ask for a project that has relevance for their business
Foundations				Principals personally asked to attend by a Board member; may be comped	Invited to sponsor as appropriate	Grant requests for projects/programs timed to meet their deadlines

**What do you see/take away
from this sample plan?**

**Anything jump out at you
or surprise you?**



Take-Aways

- Distinct Segments vs. Activities... easy to confuse and/or lean towards everyone being treated the same
- Emphasis on ***Individuals***: Board members, Major Gift Prospects and Annual Donors
- High number (and variety) of “touches”
- Investment in direct mail appeals... E-communications (including solicitations) complement paper; they do not replace paper.
- *Personal* touches with major gift prospects, businesses and foundations
- ***Board commitment***
- ***Board engagement***



Apply Adaptive Management to Your Whole Fundraising Forest/Field

- Plant seeds, monitor growth (measure), steward **and** improve/build on what you are learning!
 - New events tend to get better for 3-5 years and flatten out
 - Foundations & Corporations frequently have a short life span
 - Easier/more cost effective to *increase* commitment from current members & donors than generate new support but...
 - NEW is also important! Same inputs with improved execution is still likely to “top out”
 - Investments to generate new members & donors **take time**... keep communicating, cultivating, mailing, measuring



Membership Research Says...

- ***Retention Sweet Spot: 70-75% +***
- ***Investments pay off***
 - Sample of 15 LT's on range of gifts from new members over 5 years = \$215 - 1200
 - Purchase targeted lists to generate new members
 - Watch and test messaging
 - Offer cultivation ***experiences*** and make a compelling ask based on ***their*** interests
- ***Measure, measure, measure***
 - Retention rate
 - Lapsed member re-capture
 - New members
 - Increases in giving



Focus on Individual Giving

80% of funds raised comes from *individuals*

Set specific (\$\$) goals with your plan to achieve them

Current Members

Current Donors

New Members

New Donors

Major Donors

Major Prospects



Individual Major Gifts

- Research and create a major prospect pipeline and plan
- Build accountability with and among the Board
 - Their gifts
 - Their ability *and their effort* to at least set the table in major prospecting
- Focus on ***specific people & their potential***

First, Show Them the Love!

Convey appreciation for the donor - “Insider-y”
Educate/inform the donor on your mission or programs
Illustrate the impact of the donor’s contribution

- Board Thank You Calls - *“I love this organization, and clearly you do too- thank you for joining us! What about our work inspired you to make this gift?”*
- Thank You Postcard or Simple Mailing
- VIP Special Event/Hike/Walk/Preserve Visit - *give them access to something they want*
- Send an article of interest about your organization with a hand-written thank you for their support. *“Without you, none of this would be possible.”*



Sample Donor Strategy

Addressee	Strategy NOTES	BIO notes	Immediate Next Step	Month expected to close	FY18 IN	FY18 EXP	FY18 REQ	Lifetime \$ Amt	Total No_ Gifts Lifetime	Planned Gift?
Mary Smith	Wait until spring return. Meet with Mary and her daughter. Invite to reception- will not likely participate in hike. Need to plan for larger gift in time.	Significant capacity. Loves our work. Has never been asked for a MG. Winters in HI. Daughter helps with family foundation decisions.	ED request visit with JF and donor in early May. Prepare packet on our work.	JUNE		\$10,000	\$15,000	\$ 30,000	4	
Nancy Welsh	Made gift early January, with a request for more info on our water quality work. Visit scheduled April 17th. Plan to solicit again before fall- - too busy that time of year and prefers being contacted early.	Grew up on farm in south. Interest in water quality, climate, and smart growth.	Prepare for visit April 17- develop questions, materials for solicitation.	JUNE	\$1,000	\$10,000	\$10,000	\$ 15,000	5	
John Brady	Does not want a visit-confirmed support. Send reminder in NOV	Widower, former CEO of XX Corporation. Frmr board member. No kids.	Invite to summer donor event. No other action. Send reminder Nov	NOV		\$10,000	\$10,000	\$ 142,531	31	
Sally Wells	try to visit with ED while she is in town for short season. Request 20K for education project	Former educator. V. Interested in environmental education for children. Likes our proposal.	Invite to summer donor event with field trip staff. Visit to follow up.	AUG		\$10,000	\$20,000	\$ 77,960	12	
Bill Hanley	Priority visit! Fdn grant rounds May, Oct. Get info on his fund.	family foundation. Grant rounds May, Oct. Made a pledge that his IRA beneficiary is the land trust.	Request visit mid-March. Explain we would like to discuss the foundation's interests and our work- we see synergies!	OCT		\$10,000	\$15,000	\$ 100,000	22	Beneficiary of IRA

From Plan to Calendar

- Build in adequate preparation and follow-up time for activities
- Avoid overlap among activities, especially assuming a limited number of hands to help
- Enable everyone involved to weigh in so they can plan their part/work accordingly
- Time events with other community events in mind



Steps You Can Take Right Now

1. Build your budget to determine your fundraising goal
2. Create *your* map of activities and targets/segments
3. Develop \$\$ targets for each activity and segment
4. Build a major donor pipeline and plan *with real people* next to the numbers
5. Show your major donors and prospects the love!

