



CONSERVATION
CONSULTING GROUP

Strategic Planning – First Steps in Preparing Your Fundraising Strategies

2018 Connecticut Land Conservation Conference
March 17, 2018

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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



The reviews are IN!
(on Strategic Planning)





“Well, I’m sure you know they collect a lot of dust.”

“I’ve been to a dozen of these kinds of retreats and I look forward to them about as much as a root canal”

“I have a love-hate relationship with strategic planning; they always seem so pie in the sky.”

“I don’t think we want to interview any of our donors because they might suggest something that we don’t end up pursuing”





“That wasn’t as bad as I thought it was going to be... actually, kind of fun”

“This really re-energized my Board”

“The staff and Board have never interacted like this!”

“We’re so impressed with what you’ve been able to accomplish since the strategic plan, Sally and I would like to increase our gift from \$30,000 to \$100,000”



Vive La Différence!

Why?

How can the points of view around Strategic Planning be so different?

What's your experience?

Unpacking the Planning Process

- 1 Clarifying the Scope, Workplan and Roles
- 2 Assessment of Internal & External Conditions
- 3 Board and Staff Retreat
- 4 Refinement of Goals, Desired Outcomes & Strategies
- 5 Drafting of the Plan
- 6 Approval of the Plan
- 7 Development of Implementation Tools and Techniques

Assessment of Internal & External Conditions

- Board and Staff Self-Assessment
- Survey of Constituents (members, volunteers, program participants)
- Interviews with key stakeholders
- Foundation for decision-making (including SWOT)

The Retreat

- Board and staff with outside facilitator
- Drafting the “bones” of the plan:
 - Vision
 - Mission
 - Guiding Principles
 - ***Mission-driven goals***
 - Potential, priority strategies to achieve goals
- Timing is everything
- Location, location, location – develop generously
- Messy and FUN



Sample Goal & Potential Outcomes

Goal #3: Increase the land management knowledge and expertise of public and private landowners in the region to inspire and enable them to more effectively steward their own properties.

Potential Measurable Outcomes:

- Increase in consistent stewardship of public and private land in region
- Increase in the number of acres preserved as landowners understand the value of self-renewal
- Expansion of critical wildlife corridors and greenways



The Work of Champions!

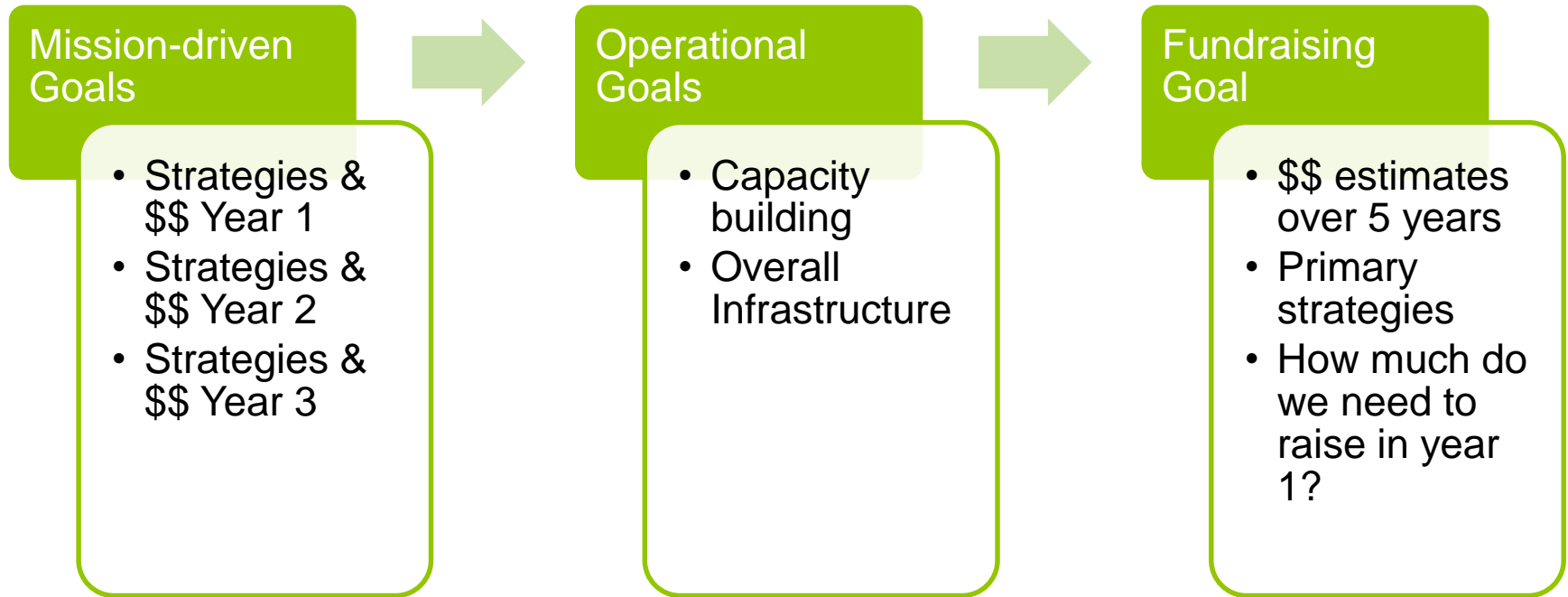
- Refining decisions made in retreat
- Putting “meat” on the bones
- Sequencing/timing of strategies
- Annual benchmarks to help you determine progress
- Identification of leads and resources needed



Example

Strategies	Parties Responsible	~ Timeline (start & end date)	Estimated Resources
<p>Identify and prioritize public (e.g. municipalities and agencies) and private landowners most critical for outreach and education (e.g. properties abutting member protected lands, riparian zones, land severing desired wildlife corridors or greenways)</p>			
<p>Systematically explore value proposition of identified public and private landowners being able to participate in Co-op</p>			
<p>Develop and employ multiple messages, frameworks, tools and training opportunities, paralleling the diversity in values, culture and land management goals present in the region (e.g. an annual or biannual convening to coordinate activities, share experiences, and even “sell” fee-for-service opportunities)</p>			
<p>Cultivate and support landowners and/or users in the active stewardship of land as prioritized, identifying and acknowledging positive progress/outcomes</p>			

Operational and Fundraising Goals Follow Mission-related Goals



“Living” Strategic Plan

- Vision
- Mission
- Guiding Principles
- Mission – driven Goals
 - Strategies and measurable outcomes
- Operational Goals
 - Strategies and Measurable Outcomes

Gets revisited Annually to re-invigorate and adapt as prudent



Lots of Good Work!

- Built consensus
- Built confidence/ownership
- Engaged both external and internal stakeholders
- Stretching the organization in healthy ways
- Articulated your aspirations/inspirations and the concrete ways in which you intend to have an impact
- And your ready to ***apply it internally*** to drive progress



But Consider

We hold ourselves back more than our fundraising environment ever will

A Strategic Plan without a plan for how we are going to use it **externally**...

A Fundraising goal (in the plan) without the messaging, communications tools and a fundraising plan to actualize it to our external publics...

It collects dust

Need to put compelling activities and real people (segments and individuals) next to the numbers you need to raise

Match Interests to Prospects

**Create powerful messaging and experiences to
*TOUCH, MOVE and INSPIRE***



Communications Messaging



Words to Use and Avoid

Bad Words to Avoid	Good Words to Use
Environment	Land, air, water
Ecosystems	Natural areas
Biodiversity/endangered species	Fish and wildlife
Regulations	Safeguards/protections
Riparian	Land along lakes, rivers and streams
Aquifer	Groundwater
Watershed	Land around lakes, rivers and streams
Environmental groups	Conservation groups/organizations protecting land, air and water
Agricultural land	Working farms and ranches
Urban sprawl	Poorly planned growth/development
Green Infrastructure	Nature-based solutions
Ecosystem services	Nature's benefits
Landscape-scale conservation	Large, connected natural areas
Stewards	Takes care of/maintains



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

A Fundraising Plan

Puts compelling **activities** and **real people** (segments and individuals) next to the numbers you need to raise

Matches Interests to Prospects

80% of Funding comes from Individuals

Set specific goals and map how you will achieve them:

- Board
- External Stakeholders (you just interviewed)
 - Other Major Donors and Prospects
 - Members and Prospective Members
 - Events

Your Plan

- 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***



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

In Summary

Actualize your Strategic Plan:

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!
6. Touch, move, inspire, ASK!!



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