Fundraising for Land Trust Stewardship and Conservation Defense Funds

Are You Ready?

Danosky & Associates
Consulting for not-for-profit organizations

Engaging philanthropy ... empowering your cause

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2012
The Four-Legged Fundraising Stool

DONOR

Memberships
Events
Appeals
Social Media

Annual Giving

Planned Giving

Major Gifts

Capital Campaigns

Bequests
Trusts
Retained Estates

Large individual gifts for a specific purpose

Multiple gifts structured for a specific purpose
Why do a Campaign?

- A specific urgent need
- Funds must be raised within a specified time period
- One donor alone cannot meet the need
- Funds cannot be raised through the usual means

- Stewardship, defense fund
- Funds are required for
  - Conservation easements
  - Ongoing stewardship
  - Manage natural disasters
- Effective way of engaging many donors
What to Expect of a Campaign?

- They are structured and methodical in their approach
- They are in response to an urgent need
- They employ common sense
- They require commitment and determination
- They are like a marathon – with eyes kept on the finish line
What do you need for a campaign?

- **Case for Support**
  - Why do you need to raise this money?
  - Why should people give?

- **Donors Willing to Give**
  - Initial prospect list completed
  - Rate & Review to identify best 60-120

- **Leadership and People Willing to Ask**
  - 100% Board Support
  - Volunteers to Serve on Cabinet and Committee
What is a Good Story for a Land Trust?

**Land Acquisition**
- Look at geographic regions
- Protecting water supply and watersheds
- Contiguous land for trails
- Sensitive eco-systems over a

**Stewardship**
- Ongoing needs
- Defense Funds

**Endowment**
- “Rainy Day Fund”
- Ongoing Operations
- Special Projects
Step 1: Case for Support
A Rousing Call to Action

- Background & Need
  - Need for your project
  - Who will benefit
  - Why now?
  - Why your organization

- Proposed Initiative
  - What do you plan to do?
  - What will be the benefits
  - What would happen if you did nothing?

- Project Description
  - Describe specific initiatives
  - What will it take to accomplish them?
  - How does it meet the need?

- Budget, Cost & Goal
  - Planning
  - Procuring Revenue
  - Architects/Contractors, etc.
  - Renovations/Upgrades
  - Equipment, furnishings
Step 2: Developing the Donor List

- Prospect Identification – analysis of donor database
  - Current donors
  - Friends & Associates
  - Individuals aligned with similar causes in the area
- Fill In The Gift Table
- Rate & Review
  - 60-120 “best donor prospects” for feasibility study
## Gift Table for $1 million
(assuming a few large gifts)

<table>
<thead>
<tr>
<th>Gift Level</th>
<th>Number of gifts</th>
<th>Total</th>
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24  $1,000,000
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### Gift Table for $3 million (assuming smaller gifts)

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Step 3: Recruit Leadership

- Board Buy-In
- A Leadership/Steering Committee to steer the campaign during its planning phase
- The potential to attract leadership to chair the campaign – either from within or without the board
- Willingness to engage in cultivating and – later - soliciting donors
Launching A Campaign

- **Campaign preparation**
  - Assess the landscape; cultivate your donors
    - Feasibility Study or Internal Cultivation
  - Determine viable goal; recruit leadership (campaign cabinet); devise plan

- **Quiet Phase of the campaign**
  - Solicit major donors only
  - Do not announce goal or amount raised
  - Secure at least 60% of campaign goal before announcing

- **Public Phase of the campaign**
  - Hardest funds to raise
  - Hold a public kick-off announcing goal and success to date
  - Reach as far into the community as possible
  - Celebrate once you have achieved goal
The Feasibility Study

- **Why:**
  - Assess readiness to undertake a campaign
  - Test campaign assumptions – case, leadership, prospects
  - Mitigate the risk of not being able to raise the money

- **How**
  - Define objectives
  - Select individuals to interview
  - Send Case for Support with invitation to participate in study
  - Consultant conducts confidential interviews (20-50)

- **What**
  - Feedback on your organization
  - Feedback on Case
  - Indication of willingness to support campaign and at what level
The Results of Feasibility Study

Deliverables:
- Recommendation on whether to proceed with a campaign
- Identification of areas which need to be refined, changed or further developed
- Identification of potential leadership
- Projection of reasonable campaign goal
- Plan of action to raise the money you need
**Time Line**

- **Months 1 & 2** –
  - Prepare Case for Support
  - Review, evaluate and identify individuals who will be interviewed

- **Month 3** – Finalize the Case
  - Rate & Review Session to finalize donors to be interviewed
  - Confirm feasibility objectives, determine feasibility questions, prepare materials, including introductory letters

- **Month 4 & 5** –
  - Conduct Feasibility Study

- **Month 5 & 6** –
  - Final Report
  - Recommendation regarding implementation of campaign plan
Alternatives to a Feasibility Study

- Develop the case and prospects
- Visit your major donors and discuss your vision without asking for a contribution
- Share a draft of the case and seek advice from these few significant donors.
- Recruit leadership for the campaign from those who share your vision
- Organize your Campaign Cabinet
- Solicit your Board – must achieve 100% financial support
- Host a reception for major donors and share your vision and your decision
- Conduct your first solicitation
KEYS TO SUCCESS:

Knowing your donors
Having outstanding leadership
Telling a compelling story
Your Case for Support

- Share your mission
- What difference do you make?
- What do you hope to do tomorrow?
- Tell a story
- What do you want me to do?
How to Share Your Story

- PURPOSE
  - Share your mission
- IMPACT
  - What difference do you make?
- VISION
  - How do you hope to change the world?
- STORY
  - Tell the story in human terms
- ROUSING CALL TO ACTION
  - What do you want me to do?
Your mission

- 10 words or less
- Noun; action verb; modifier (preposition); noun
  - We rescue animals who have been abused or abandoned
  - We teach children to reach for their dreams
  - We give food to the hungry
  - We improve the lives of people with disabilities
  - We give shelter to the homeless
  - We protect land for future generations
How long have you been doing this?
  - When did you begin

How effective have you been?
  - How much land have you protected?
  - What is different today than when you started?

How have you used the money you have been raising?

What difference has it made in the lives of people? Tell me your value in human terms
What do you want to change?
- Make it better, make it stop, more hope for more people?
- What is the problem – and what will be the result if nothing changes?

How will you do it?
- Be direct and tangible

What will the world look like once it’s changed?
- Paint the picture
Tell me a story ..... 
- Make it personal 
- Make it poignant 
- Make it encompass the major points
  - Purpose 
  - Impact 
  - Vision 
- Make it touch my heart
ROUSING CALL TO ACTION

- What do you want me to do?
  - Be clear
  - Be direct
- Show them they can make a difference
- Summarize
  - Purpose
  - Impact
  - Vision
  - Story
The Full Case

**GENERAL**
- Mission
- Vision
- History
- The services and activities you provide
- Statement of community need – what is the threat
- Why you are raising funds
- What will you do with the funds you have raised

**DETAILS**
- Staffing – current and anticipated
- Governance – Board members and accountability
- Facility needs if any
- Endowment if you have or are growing through this effort
- How much you need to raise and why
- Budget – how the funds will be allocated
- Gift range chart
- Named-giving opportunities
- Financial Statements
The Role of the Case in your Plan

- Personal Solicitations
- Annual Appeals
- Grants
- Marketing Materials
- E-Newsletters
- Annual Reports
- All donor communications

✓ Be consistent
✓ Don’t confuse your donors
✓ Repeat your story often
✓ The more you stay on message - the more your donors will understand
✓ The more your donors understand – the more they will invest

You share your vision and your goals publicly, not how much you need to raise or have raised
Why Are You Raising Money?

Harold J. Seymour, in *Designs for Fund Raising*, sums up the definition of a good case for support:

Finally, it should be said that the case for fundraising, taking into account what has been said about people, causes, and giving, should aim high, provide perspective, arouse a sense of history and continuity, convey a feeling of importance, relevance and urgency, and have whatever stuff is needed to warm the heart and stir the mind.
Prepare a Case for Support
Here’s What You Need To Consider

**GENERAL**

- Mission
- **Vision**
- History
- The services and activities you provide
- **Statement of community need** – what is the threat
- **Why you are raising funds**
- **What will you do with the funds you have raised**

**TELL THE STORY**

- **PURPOSE**
  - Share your mission
- **IMPACT**
  - What difference do you make?
- **VISION**
  - How do you hope to change the world?
- **STORY**
  - Tell the story in human terms
- **ROUSING CALL TO ACTION**
  - What do you want me to do?
Working Lunch & Panel Discussion

Cumberland Land Trust

Joshua’s Tract and Historic Conservation Trust

Sakonnet Preservation Association
Closing Summary:
Are You Ready?

Engaging philanthropy ... empowering your cause
Do You Have a Case for Support?

- Why are you a worthy organization?
- What are you trying to achieve?
- Who will benefit – how will the world be better?
- What – specifically – will you do?
- What will it cost?
Do You Have Donor Prospects?

- Prepare an organizational gift table
- Based on your gift table – who has the potential?
- Fill in the Boxes
- What do you need to do to cultivate them prior to the feasibility study or on your own to ensure they will support this effort?
Is the Board Prepared?

- Leadership on Board?
- Steering Committee potential
- Do they understand the need – the case for support
  - Are they behind it?
  - Can they articulate it?
- Do they understand the process?
- Will they identify potential prospects?
- Will they inform/cultivate people they know?
- Will They Ask?
Is This the Right Time For a Campaign?

There is never a good time for a campaign

You can only ask is it right for you?
Danosky & Associates helps non-profit organizations build the capacity to move their strategic vision forward with a solid foundation and an army of support behind them.

Follow Me! Connect with Me! Friend Me!

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