

## Finding Your Groove With Major Gift Cultivation

by David Allen  
Developed for  
Madison Non Profit Day  
28 October 2013



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## Outline for the Session

- Introductions
- Frank Talk About Money
- Decision-Making Dynamics: Why People Give
- Major Gifts Vs. Major Donors
- How to Get Started
- Cultivation Basics
- Wrap



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## David Allen Development for Conservation

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



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## Thank You!

Stephen Covey,  
*Seven Habits of Highly Effective People*

Bill Sturtevant,  
Institute for Charitable Giving

The Nature Conservancy

Dan Burke & Laurel Hauser  
Door County Land Trust

Jeff Schreifels & Richard Perry  
Passionate Giving Blog



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## Frames of Reference

- Fundraising is about building relationships; only 10% is about “asking”
- All Board Members fundraise
- You have to give yourself to be effective as a fundraiser
- \$1,000 is not as much money as it used to be



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## Frank Talk About Money

- It is difficult to do much for less than \$20.
- Time is NOT the same as money.
- “I don’t have enough” time/money really means “I choose to spend my time/money elsewhere.”
- \$100 is – literally – pocket change for most people. Many take \$100 at a time from ATMs.



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## So....

- Regularly asking for \$100 is OK
- Almost everyone **could** give \$1,000 if they really wanted to
- Many people could give \$10,000 if they could spread payments out over time



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## So....

- If our belief that a donor cannot *afford* a \$1,000 gift prevents us from asking, that says more about us than about them.
- Don't say NO for people by not asking.



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## Board Campaign

### Board

- Chair, FR Chair, ED set Board goal
- Chair sets the tone, makes his/her gift first
- Chair solicits other Board members
- First Quarter Activity
- Pledges OK



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### *Fifty-Three Ways*

for Board Members to Raise \$1000

by Kim Klein



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## Why do People Give?

1. What's being done is worth doing
  - Belief in the Mission
2. The organization involved can get it done
  - Fiscal stability
  - Regard for staff leadership
  - Respect for the organization locally
  - Regard for volunteer leadership

## Definitions: Annual Gifts

Annual and Major (Gifts) describes the decision-making process, not the dollar amount.

Annual (periodic) Gifts require little, if any, deliberation by the donor.



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## Definitions: Annual Gifts

- Annual expectation (renewal)
- General organizational appeal (operations)
- Mail or phone solicitation
- Quick response
- Small(er) gift size
- Measure of success = YES



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## Definitions: Major Gifts

- Specific need
- Unique appeal
- Personal ask
- Multiple visits
- Large(r) gift size
- Measure of success = ADVANCE



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## Major Gift vs. Major Donor

- A major gift for the organization might be the lowest amount given by the topmost 10% of your donors.  
*(Top 100 or major donors)*
- A major gift for the donor might be the amount they have to think about before saying yes.



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## Ultimate (Planned) Gifts

- Long-term relationship with organization
- Organization is one of donor's only charities
- Desire to leave a legacy



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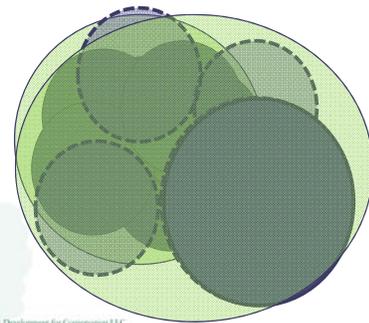
## Sustainability

Robust, resilient, sustainable organizations work with their donors on **annual gift, major gift, and planned gift** programs, all three, *at the same time* with systematic board member engagement and adequate staff support.



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## Access



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## Getting Started

Access?	Regular, Systematic Cultivation	Ready to Start "The Conversation"	Ready to be Asked
Major Gift Potential	•	•	•
•	•	•	•
•	•	•	•
•	•	•	•
•	•	•	•



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- ## Getting Started
- What's the next cultivation step?
  - Who's going to do it?
  - By when?
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- ## Five Basic Principles
- Facetime is KING
  - Redundancy
  - Prospects selected based on giving capacity
  - Three-year cultivation plans
  - Relationship is recorded in the files
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- ## Five Types of Easy Cultivation
- Annual Renewal Solicitation and Acknowledgement
  - Introductions to other org leaders
  - Invitations to YOUR events
  - "Chance" meetings at their events
  - Share news and stories
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- ## A Word About Donor Files
- You need them
  - Include essential contact info
  - Copies of everything that comes from THEM – including email and checks
  - Strategy and cultivation planning
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- ## Getting Started
- Make your own gift
  - Pair up with a member of the Development Committee
  - Screen your entire donor list
  - Select five prospects to start and eventually settle on just three
  - Research each one
  - Call each one – get to know them
  - Draft a Status Paragraph about each one
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## Screening

- List of all current donors
- Circle each one you know & have access to
- Star each one who is capable of making a \$10,000 giving decision



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## Metrics

Land Trust Dashboard - Sept 10, 2013 Board meeting

		Target	Current 8/28/13	Previous 7/9/13	Status	Notes
Fundraising	T-100 Contacts	300	65	59	R	24 prospects in 10 contacts per year.
	New donors	200	70	63	Y	Additional gift of \$10,000 from the former Executive Director in 2012. Significant fundraising goal - 100% of new donors are \$10,000 or more. (2013 - 2014 year ending 10/31/14)
	Progress to budget goals	\$234,050 100%	\$107,262 46%	\$88,473 38%	Y	Good results from the July board letter. Fundraising exceeding the year to date 2013. 40% of total budget goal and 38% of total budget goal. The Executive and staff are working on a plan to reach the 100% goal by 10/31/14.
Active Land Protection Programs	Outreach and project development phase		20	21	Y	
	Board approved due diligence phase		6	5	Y	
	Active with Board approval to close		2	2	Y	
	Monitoring visits completed	40	26	23	G	Good results and strong progress to date on these visits. The staff is working on a plan to reach the 40% goal by 10/31/14. Please email David if you are interested in joining.

## Services

### Assessment, Planning, Training, Coaching

*You can raise more money for your organization  
– I can help.*

[fundraisinghelp@sbcglobal.net](mailto:fundraisinghelp@sbcglobal.net)  
608/239-5006



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