Getting Started with Major Gift Cultivation

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To raise the money needed for land acquisition and stewardship and to provide long term stability, most land trusts need to cultivate donors for much larger gifts in addition to standard membership, special project appeals, auctions, and other fundraising activities. This work is ideally suited for board director involvement. Major gift development is a deliberate, on-going cultivation program aimed at cultivating and soliciting donations of $10,000 and greater. Most of these donations will be targeted to specific projects or programs, but renewing annual membership for the donors involved remains an important cultivation tool and should be specifically incorporated.

Major gift development is built around the following set of principles:

- Cultivation is about personal connections between organizational leaders and donors.
- Redundancy: Prospects should know more than one director/staff.
- Prospects are selected based on giving capacity and inclination, not necessarily on past giving.
- For each major donor and prospective donor, the land trust maintains a three-year cultivation plan and a series of immediate next steps (by whom and by when). Each director and the ED/DD[1] accepts some minimal level of responsibility as well. Those who can do more are asked to do more.
- The relationship each donor has with the organization is recorded on a profile sheet. Each profile includes a photograph and is permanently filed, with their cultivation plan, in the office. Profiles are regularly shared with all directors so that, over time, directors learn who the top donors are.

Step by Step

<u>For Each Director</u>

1. Make a gift that is significant for you. The gift may be made in the form of a pledge to be paid monthly or quarterly during the year.
2. Participate in a screening exercise designed to formally review the entire mailing list. Identify everyone you know personally and/or *have access to*, meaning that they would return your phone

[1] In writing this up, I have made the assumption that the organization in question has an Executive Director (ED) and a Director of Development (DD). In the absence of the latter, the ED inevitably wears both hats, and in the absence of an ED (ie. no staff), it will be necessary for a members of the board to play this role.

call if you were to leave them a message. Second, identify anyone with known capacity to make giving decisions of $10,000 regardless of whether you know them or not. This may be based on personal knowledge of their income or net worth. It may also be based on known giving to other charities.

3. From the resulting list of potential donors, select five (5) that you would enjoy working with or getting to know better. You may select people you know, people who live near you, or people based on some other criteria. Some prospects will be selected by several board directors. We want to make appropriate pairings and knowing who you want will help determine the final "donor partner" pairings.

4. Accept initial responsibility for a set of three (3) donor partners.

5. Work with staff to access the database and understand each donor's giving history with the organization along with any other institutional history (prior board service, volunteer activities, event participation, and so on) that they might have. Call and interview other board members who indicated that they knew your donor partners Google them to see what you can learn from the internet.

6. After doing the initial research, call them. Tell each one who you are, that you are not calling for money, and that you would like to ask them three questions about their experience with the land trust to date. The questions may be chosen from the list below. Understand that the actual questions you choose and their answers to them are not as important as the time you spend talking and getting to know them better.

    a. How long have you been a member?
    b. What first attracted you to the land trust?
    c. What do you like most about the land trust?
    d. Did you know about land trusts before you became a member?
    e. Are you a member of other land trusts? TNC?
    f. Have you ever attended one of the events? (Auction fundraiser, annual meeting, hike, other?)
    g. Have you ever visited one of the preserves? Would you like to?
    h. What do you think of the newsletter?
    i. Have you ever met our Executive Director?
    j. Is there anything about the organization that you would like the board to hear?
    k. What would you most like to see the land trust accomplish in the next 5 years?
    l. Do you feel that you've gotten a good return on the investment you've made in the land trust?

7. Now write up in plain English (no shorthand, no jargon, no acronyms) description of what you have learned. Share it with a member of the Development Committee (DC) and answer the following two questions:

    a. Is this a person you feel like you could work with over the next few years? If not, is there someone else on the board who could? (You would need to "adopt" a replacement donor partner and go back to Step 5.)

    b. Is this a person who has "cultivatable" interest? If not, why not? If so, what might they be interested in?

8. Finally, again working with a member of the DC, draft a cultivation and solicitation plan for each of your donors covering the next three years. Identify membership renewals, any special appeals, invitations to special events, invitations to preserve walks or field trips, and any other cultivation activity you might devise to spark a known interest of theirs. Introduce them to the ED and to board leadership. Calendar as much of this activity as possible.

9. Identify and calendar a specific next step for each donor. Communicate the profile descriptions, cultivation plans, and calendared next steps with staff so they can maintain the donor files and a master cultivation calendar.

10. If this process has been fairly comfortable for you so far, consider accepting responsibility for additional donors up to a maximum of ten.

<u>For Members of the Development Committee (DC)</u>

11. Pair up. Work with another member of the DC on your own donor partners and on theirs. Share cultivation ideas and hold each other accountable for making progress. Help each other troubleshoot problems.

12. Also pair up with a board director who is NOT on the DC with the same objectives in mind.

13. Create space at committee meetings and at board meetings to share problems, ideas, experiences, and stories around the table.

For the Executive Director and Development Director (possibly with assistance from other Staff)

14. Maintain a master calendar of cultivation activity that is both donor specific and director specific. Make yourself available to attend as many events and meetings as possible.

15. Maintain complete and accurate files, both paper and electronic.

16. Identify and help troubleshoot issues and problems as they arise.

17. Prepare materials and sample letters for directors to use as models.

18. ED Only: Go through steps 4-9 for at least ten donors to cultivate personally.

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 more than 25 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, I left the Conservancy to work 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 left my position with Sand County Foundation and launched my consulting business full-time using the name **Development for Conservation**.

Also in 2009, I partnered with Peter McKeever to form Allen-McKeever Land Trust Services. 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
- Membership Renewal and Upgrade
- Interim Staffing

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

DEVELOPMENT FOR CONSERVATION

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Development for Conservation

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