

Overview of Capital Campaigns for Conservation

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Session 1: Over view & Feasibility Study

Basic Organizational Imperatives

I. Create a Strong Organization

- 1.) Civic Passion
- 2.) The Primacy of Mission
- 3.) Public Benefit (Define Success)
- 4.) Determine Culture
- 5.) “Provide, Provide”

II. Effective Governance

- 1.) Board Roles and Responsibilities
 - Committee Structure
 - Policy, Planning, Oversight, Perpetuity
- 2.) →Stable and Productive Function
 - Staff Roles and Leadership
 - Operational Form and Function
 - Funding the Organization
 - Attracting, Engaging & Retaining volunteers

III. Strategic Planning

- Who, What, When, Why
- Translating Strategy into Daily Operation
- Cultivate the Ability to Self-Assess

Basic Tenets of Fundraising

- 1.) Meeting Responsibilities
 - The Annual Fund – 100% participation
 - Capital Funds: Acquisition & Stewardship
 - Endowment: Perpetuity Defined

Qualities of Successful Fundraisers

Persuasiveness & Relationships vs. Command & Control

- Dedication to Mission
- Sacrifice Time & Talent
- Generosity of Resources
- Clear Devotion to Teamwork
- Confidentiality – (“Duty of Loyalty”)

Acceptance of Outcome
Positive Energy
Perseverance

Preparing for the Campaign

- 1.) Self-assessment
- 2.) Define Public Benefit
- 3.) Internal Case Statement
- 4.) Organizational Commitment
- 5.) Identify Constituencies
- 6.) Choose, Organize, Train Volunteers
Mission And Confidentiality
- 7.) Assay Core Supporters
= Feasibility – How much do we need? How much can we raise?
- 8.) Internal Structure: Communications, Clerical, Finance
- 9.) Have a Plan B

Elements of Success:

- 1.) Target, Terms, Timing
 - 2.) Effective Case Statement & Letters
 - 3.) Sufficient Skilled Volunteers
Office, Rating, Calls, Thanks
 - 4.) Adequate Prospect List
Building the Pyramid
Rating & Assigning
Asking
 - 5.) Sufficient Lead Gifts
Trustees & Insiders
 - 6.) Effective Personal Mailings
 - 7.) Useful Press Relations, Schedule
 - 8.) Successful Calls!
 - 9.) Well-Managed Back-Shop
- In Flight:*
- 10.) Retain Perspective
 - 11.) Cultivate a Culture of Generosity
Glass $\frac{3}{4}$ full
 - 12.) Manage Crises Well!
 - 13.) Cultivate Courage
 - 14.) The Mother of Invention
 - 15.) Persevere
 - 16.) Give Thanks Constantly!

Plan B

Manage Success

- 1.) Give Thanks
- 2.) Celebrate!
- 3.) Perpetuate
- 4.) Capture Lessons Learned
- 5.) Newsletter! – New Members!
- 6.) The Following Annual Fund → What Next... in the growth and prosperity of your land trust

Session 2: Execution

I. Strong Organizational Foundations

- Passion
- Mission
- Board Engagement
- Staff and Board Roles
- Non-Staffed Land Trusts
- Solid Operational Footing
- Regional Strategic Planning
- Defining Priorities
- Develop Goals
- Organize Coalitions
- Economics of Scale

Challenges to Aggregation

- 1.) Security of Annual Support, Institutional Integrity
- 2.) Confidentiality –Duty of Loyalty
- 3.) Territory of Donors, Prior Relationships

Keys to Cooperation

- 1.) Strong Individual Organizations
- 2.) Strong Relationships
- 3.) Crafted, balanced Public Profile
- 4.) Senate Function
- 5.) Written Agreements

Mastery of Fund Development

- 1.) Crucial Role of (all the) Board
- 2.) Internal Coordination of Board Committees, Executive Land Development – Stewardship – Full Board
- 3.) “Temperatures” of Senior Members, Organization Mentors

- 4.) Leadership of Staff
 - Executive Director
 - Development Director
- 5.) Cultivation of Key Donors- Ongoing
- 6.) Continuing Dialogue with Donors
- 7.) Building a Strong Organization ALWAYS!
- 8.) →TIMING!
- 9.) Publication – Grade Case Statements
- 10.) Cultivate Effective Press Relations
- 11.) BUILD A STRONG MEMBERSHIP
 - House of Representatives
- 12.) Businesses and Corporations
 - Mutual Benefit
- 13.) Foundations
 - Regular Informal Contact

Endowment!

“Provide, Provide” – Robert Frost

“People give to people” – Joe Breiteneicher

“You, my friend, are in the business of Career Counseling for retired persons” – Martin Berman

“The Key to your success in life’s work is the creative use of your personality” – Mary Brewster