

RCP Network Gathering 2012
Tom Curren Notes
Overview of Capital Campaigns for Conservation
Session I
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Introduction

The current conservation community is working during a dynamic period characterized by a rapidly changing relationship between people and the land. Our society is becoming more sensitive to its environment; this is a trend that will continue because our disconnect with nature will continue to prove out to be very expensive. If we accept the responsibility, our conservation community can exercise a new and effective diplomacy between society and its environment.

At present, the conservation community only garners about 2% of American Philanthropy. Given the growing need to address climate change, food security, water supplies, and biological diversity, this amount needs to increase to 5 – 10% for the good of our society.

Best organizational results follow best organizational practices; nowhere is this more important than in the function of non-profit organizations (aka “mission-based organizations”).

A. Basic Organizational Imperatives:

1. A strong organization is built as an expression of focused Civic Passion -

Unlike a government organization whose incumbency changes with the will of the electorate, or businesses that have to change in order to keep pace with the market, the non-profit mission is one that devotes itself to a specific public benefit and perpetuates it. The basic non-profits job is to hold true to its mission.

2. The Primary Mission –

Non-profits should know who they are and what their mission is. They need to stay focused on their mission so that they have the ability to focus others on it.

3. Defining public benefit defines success, and helps you focus on your philanthropic market and allies.
4. Resolve to create and maintain a functional organization whose daily activities are directly related to progress towards your goals.
5. Routine begets inertia. Practice best management principals and keep focused on your goals. Your passion and your competence will inspire others to help you attain goals beyond that which you might think are possible.

B. Effective Governance:

1. Board of Trustees –

The relationship of the Executive Director and Board is the fulcrum of effective organizational function. The Board should be responsible for setting policy, developing the long term goals of the organization, hiring of the executive director, assuring financial stability, and auditing. *Fundraising should not entirely be the staff's responsibility.* Multiple stakeholders spread out the decision making power.

2. There should be a robust Committee Structure of the board, including:

- a. Lands Committee- considers potential projects for recommendation to full board
- b. Development Committee-organizes and supports fund-development activities
- c. Stewardship Committee – monitors and meets all stewardship obligations
- d. Trustees Committee- evaluates performance of board; nominates senior members for emeritus status
- e. Nominating Committee- considers new nominees for the board

Each subcommittee chair should be part of an executive committee that meets with some frequency (it is common for executive committees to meet monthly, with the full board meeting quarterly).

If you are going to become a fundraising board you need to be able to look at your board structure and ensure that it provides stability to the organization and is productive and *goal oriented*. The board should define staff roles and functions, maintain appropriate funding levels for the organization's needs, and be able to attract,

engage, and retain volunteers. Boards can be transformed by bringing on people who have experience on other successful fund raising boards and/or who have other needed experience.

C. Strategic Planning:

Who, What, Where, When

1. Look at totality of your Region. What are its attributes, what natural and historic qualities make it special? *What do you want to be successful at and what can you be successful at?* Think of constituencies outside of conservation circles who can embrace and support your activities.
2. You need to be able to translate your strategy into daily operation. It is very important to use each other as resources and to help one another to keep the faith and keep focused on practical outcomes of your activities.
3. The organization needs to cultivate the ability to self-assess its processes and their outcomes.

The organization needs to spend time outside in the community and perhaps less time in meetings. Make sure you are available for people to contact you (invest in a live human being to answer the telephone). Most of the time the organization needs to be engaging with people from the general populace: landowners, donor prospects, educators, businesspeople, farmers, bird-hunters, bird-watchers....etc.

D. Ways and Means- The Basic Tenets of Fundraising:

Meeting Basic Responsibilities

1. Annual Fund –
You should have enough funds to operate for 6 – 12 months before starting a capital campaign.
There should be 100% participation by the board in the Annual Fund.
2. Capital Funds

Any property you seek to raise funds for should meet a clear community need—or several of them!

Acquisition of stewardship funding is very important-include ample stewardship funding in your reckoning of campaign costs.

Bio-inventories and land histories are very successful fundraising tools.

#. Endowment Funds-

Always focus on endowment; interest should be enough to run the organization.

Donor should be looked at progressively – annual donor, to capital donor, to endowment donor. Perpetuity can be defined as a well-managed endowment adequate to meet your responsibilities through interest.

Qualities of Successful Fundraisers:

Persuasiveness-Ability to Maintain Relationships – Adaptability—Generosity of Spirit.

Fund Raisers' Characteristics –

- Dedication to Mission,
- Properly trained by your organization,
- Able to sacrifice their time and talent,
- Generosity of Resources
- Clear devotion to teamwork
- **Confidentiality – duty of loyalty - * very important, Mass. Law – information you learn in the service of a conservation effort is not your personal information, nor can it be shared outside the organization.**
- Acceptance of Outcome—grace under
- Positive Energy
- Perseverance

*****Honor anonymity in all cases—prove you can keep a confidence.**

E. Preparing for the Capital Campaign Campaign:

1. Self-Assessment –

Is your organization ready for the operational demands of mailings, volunteer training and monitoring, gift management, timely acknowledgment, and financial record-keeping and reporting that are part and parcel of a capital campaign?

2. Define public benefit –

You have to sell the project to yourselves before you can sell it to others.

3. Internal case statement –

What will this initiative do for the evolution of the organization? Leave it stronger? Or tax it beyond its limits?

4. Organization commitment.

Full board must approve all capital projects—enthusiastically and with the expectation of personal involvement.

5. Identify constituencies.

Build lists of other organizations that might benefit from the effort. Assess, gain their support.

6. Choose and organize fundraising volunteers. Train givers who become getters!

7. Ask core supporters – they don't always have money but may know someone that would be able to help with funding or information. Always come out of a meeting with more information than you went in with. Even if a supporter is unable to provide funds keep them informed of progress and keep talking with them.

8. Feasibility –

How much does the organization need and how much can the organization raise? This is the critical judgment call.

9. Before you start a capital campaign the internal structure of an organization needs to be strong. You will need adequate operating reserves and sufficient staff and volunteers.

“Wait till next year” is a fine motto for conservation groups as well as Red Sox fans.

10. Always have a Plan B before you need one.

F. The Elements of Successful Campaigns: Targets, terms, and timing.

1. Effective case statement and letters signed by someone they know. Don't "personalize" your message: MAKE IT PERSONAL!

2. Make a thank you call to the donor the day after a donation comes in.

3. Have an adequate prospect list. You should be prepared to ask for a total amount many times more than the amount you need.

4. Have sufficient lead gifts before you go public with a campaign. Do you know where ½ the gifts will come from? Trustees and insiders?

5. Adequately train your staff and volunteers for their fundraising roles.

6. Create and use effective personal mailings. Make a personal visit for any donation over \$500.00.

7. Cultivate useful, regular press relations—way ahead of deadlines. Ask advice.

8. Acknowledge successful fundraising efforts on the part of your volunteers.

9. Keep good records and make them accessible: "Ask me again in November" is a message that should not be lost! Nor "I don't care about forest properties—but let me know when you decide to do something about farm protection!" (or something else).

10. All thank you's should be out within a week signed by the ED.

During the campaign

11. Manage crisis effectively.

12. Cultivate courage.

13. Be the mother of invention.

14. Persevere.

15. Give thanks constantly.

16. Always have Plan B!

G. Manage Success:

1. Give thanks.
2. Celebrate.
3. Perpetuate stewardship.
4. Capture lessons learned – both good and bad.
5. After a successful campaign the next newsletter has to be OUTSTANDING! Send them to all your new members that contributed to the campaign.
6. After a successful campaign the next year's annual fund should increase.

H. What's Next?

For the growth and prosperity of your land trust:

Keep contacting people at important times in their lives – births, marriages, and deaths.
Keep talking and spending time with the people that support you.
Create “collectible” printed materials. Think Beyond the Website!

At the end of the campaign you want your organization to be stronger then when you started. You should have a greater membership base after your capital campaign, and your annual fund should increase the next year.

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Execution of the Campaign – The campaign must have a focused lead individual, who is responsible for its organization and execution.

Strong Organization Foundation:

The Board should have a passionate and full understanding of the organization's mission.

Board and staff should know their roles in the organization, roles should be clear for non-staffed land trusts.

The organization should be on a solid operational footing.

Non-staffed land trusts should have a strong reporting discipline and sufficient financial and legal support.

Regional Strategic Planning:

1. Define priorities –science, recreation, community character. What are the most important values in your area? Think about who else will support you.

Create a Case Statement for your region by doing biological and cultural inventories, they are very important fundraising tools. Include the history of the region and what makes it special. Knit your community together with your case statement, and establish your organization as a key player in preserving what is good about the region.

2. Develop Reasonable Organizational Goals.

Make sure that what you propose to do is, in fact, feasible! Beware of acting on emergencies! Crisis planning may be a contradiction in terms, especially if a particular set of decision can be deferred until adequate planning and discussion has occurred.

Challenges of Aggregation – Multiple Organizations Working Together for a Common Cause

1. Maintenance of security of individual organizations' annual support and institutional integrity. It is vital that all participants feel supported rather than threatened by the prospect of collaboration. This may require some frank discussions about autonomy and boundaries—they are well worth having!
2. Confidentiality. It must be absolutely clear that donor information developed during a campaign is not social fodder, nor is it transferable to other uses.
3. No potential transaction should be discussed in public until it is secured by a purchase-and-sale agreement. Loose lips are expensive!
4. Maintenance of organizational territory of donors and prior relationships. This is common sense, but it should be explicit—and in writing!

Keys to Cooperation:

1. Strong individual organizations. No fiscal emergencies!
2. Strong personal relationships between staff. If a problem arises—pick up the phone!
3. Crafted balanced public profile, all the partners should be equal in the public eye.
4. Individual organizations should have an equal vote. Burden is on the bigger organizations to act in a manner respectful and equal—such as, in theory, the U.S. Senate does. Each state gets 2 votes, no matter how small!
5. Address problems before they happen if possible. Anticipate glitches and concerns whenever possible.
6. Written agreement helps prevent problems.

Focus On Fund Development:

1. Fundraising is a crucial role of the entire board, not just a few junior members. The Development Committee should not report last in the board meeting!
2. Strong internal coordination of Board committees is essential—Finance should be as informed and excited as Lands about a new project.
3. Cultivate a group of mentors and donors to run ideas by—discuss the idea of a campaign before it is written in stone. Gauge support, gain advice, seek counsel.
4. A major role of the Executive Director is to make sure the organization is adequately funded. The Development Director works under the Executive Director and helps the Executive Director organize fund development for the organization.
5. Timing of the campaign is critical. Know the financial conditions of the time you are fundraising in and give yourself enough leeway to reach your goal. Recessions cut both ways—donors are constrained, but land prices are often lowest. Know your territory. A good bargain is often part of a compelling case statement!
6. Go public with your campaign after you know where 40% of the funding is coming from. People give to projects they believe will be successful—and that have broad support.
7. If you are a seasonal community, time your campaign to when your donor base is in the area. Make sure you continue press coverage in local papers—which have significant readership in warm climes among your retired constituents.
8. You may want to plan your campaign to end in March for tax purposes—you can garner gifts from 2 tax years. Fiscal year deadlines may be important to you—but often are of no interest to donors.
9. Ensure that staff and board give to the annual fund.

10. Continually develop your board!

Case Statements –

Case Statements should be publication grade. Invest in photographs, graphic design, include quotes, old and new maps. Make a document that people will carry in their briefcases, put on their coffee tables, give to friends and associates.

Community Relationships –

1. Create and maintain good relationships with the press.
2. Create relationships with your region's attorneys, estate planners, universities, churches, hospitals, businesses and corporations. (Give family memberships to their staffs).
3. Have regular internal contacts with funding foundations—don't just go to them when you need money. Engage foundation officers personally off-deadline times.
4. Never do an end-run around foundation staff.
5. Foundations are more important after they fund you—as references and contact points.

In all things—remember that you should always be working towards having a sufficient endowment.