

LESSONS LEARNED FROM A PEER COHORT APPROACH TO BUILDING FUNDRAISING CAPACITY

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OVERVIEW

1. Context
2. Participants
3. Goals
4. Model
5. Outputs
6. Results
7. Benefits of Participation
8. Lessons Learned
9. BONUS MATERIAL



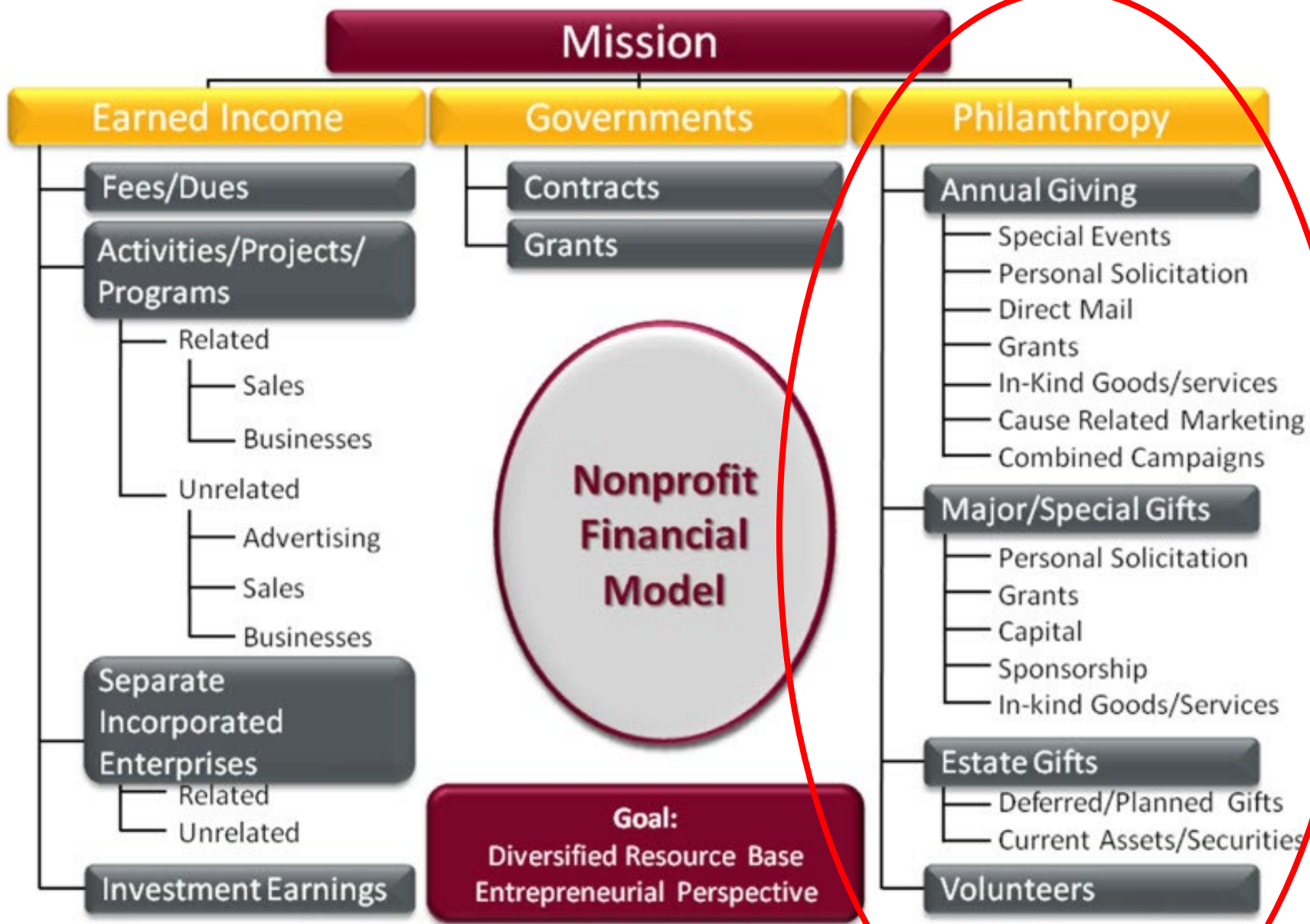
► The challenge

- Organizational resiliency tested
- Fundraising and grant uncertainty

► The opportunity

- Outdoor spaces valued more
- Local agricultural products in high demand





DREAM TEAM



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THE GRANTOR

THANK YOU



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2. PARTICIPANTS

GOALS

- Build capacity by understanding
 - fundraising strengths and weaknesses
 - philanthropy best practices
 - how to focus limited staff, board, and volunteer resources
 - how to tie fundraising planning to strategic planning and budgeting
- Increase organizational resilience
- Develop a peer learning network
- Develop a replicable model



COHORT MODEL

- Monthly consultant-facilitated peer networking/learning sessions
- Organizational fundraising assessments and board presentations
- Donor Search
- Three half-day trainings on fundraising metrics, fundraising planning, and planned giving
- \$3,000 funds to support implementation
- Before and after survey



Prime Grant
Recipient
Consultant
Contractor
Project Manager



**DEVELOPMENT
— FOR —
CONSERVATION**

David Allen,
Consultant

RESULTS

Participants reported the following changes/improvements as a result of the program:

- **Annual appeal process** (segmentation, second mailer, specific dollar asks, additional appeals, etc)
- **Fundraising reporting** (metrics, dashboards, etc)
- **Development committee**
- **Major gifts and donor circles**
- **Donor engagement** (one-on-one communication, board involvement, retention, etc)

SURVEY RESULTS

Leadership	Change in Capacity
I understand my land trust's fundraising strengths and weaknesses.	36%
I know where to focus my time, energy, and resources to meet my land trust's fundraising goals.	31%
I know how to direct my staff and volunteers to support my land trust's fundraising efforts.	42%
I know how to involve my Board in fundraising.	42%
I know the fundraising strengths of individual board members.	40%
My Board members all give, and their giving helps set the bar for other donors.	0%
My land trust has an effective Fundraising/Development Committee.	25%
Total Change	30%

SURVEY RESULTS

Technical	Change in Capacity
We are collecting the data we need on our donors.	70%
We generate the reports we need to understand our donor data.	60%
We use our donor, gift, and communications data to inform fundraising and communications planning.	125%
I understand how much it costs my land trust to recruit a new member.	86%
I understand best practices for written donor communication, including appeals and newsletters.	50%
I understand best practices for monthly giving programs.	36%
I understand how to segment my donors to facilitate targeted communication.	31%
Our website clearly directs donors on ways to give and can accept electronic payments.	20%
Our acknowledgement systems and materials communicate effectively that gifts are making a difference.	55%
We offer a diversity of engagement opportunities for our members and donors, and a growing percentage of them are responding positively to their level of engagement.	40%
Total Change	52%

SURVEY RESULTS

Strategy	Change in Capacity
I know how much money I need to raise to meet my land trusts goals over the next five years.	8%
I have identified major gift prospects from my donor group.	30%
I understand engagement strategies for building relationships with major gift donors.	73%
I understand the role campaign fundraising should play in our overall approach to raising money.	67%
I know how to market and manage a planned giving program.	100%
Total Change	51%

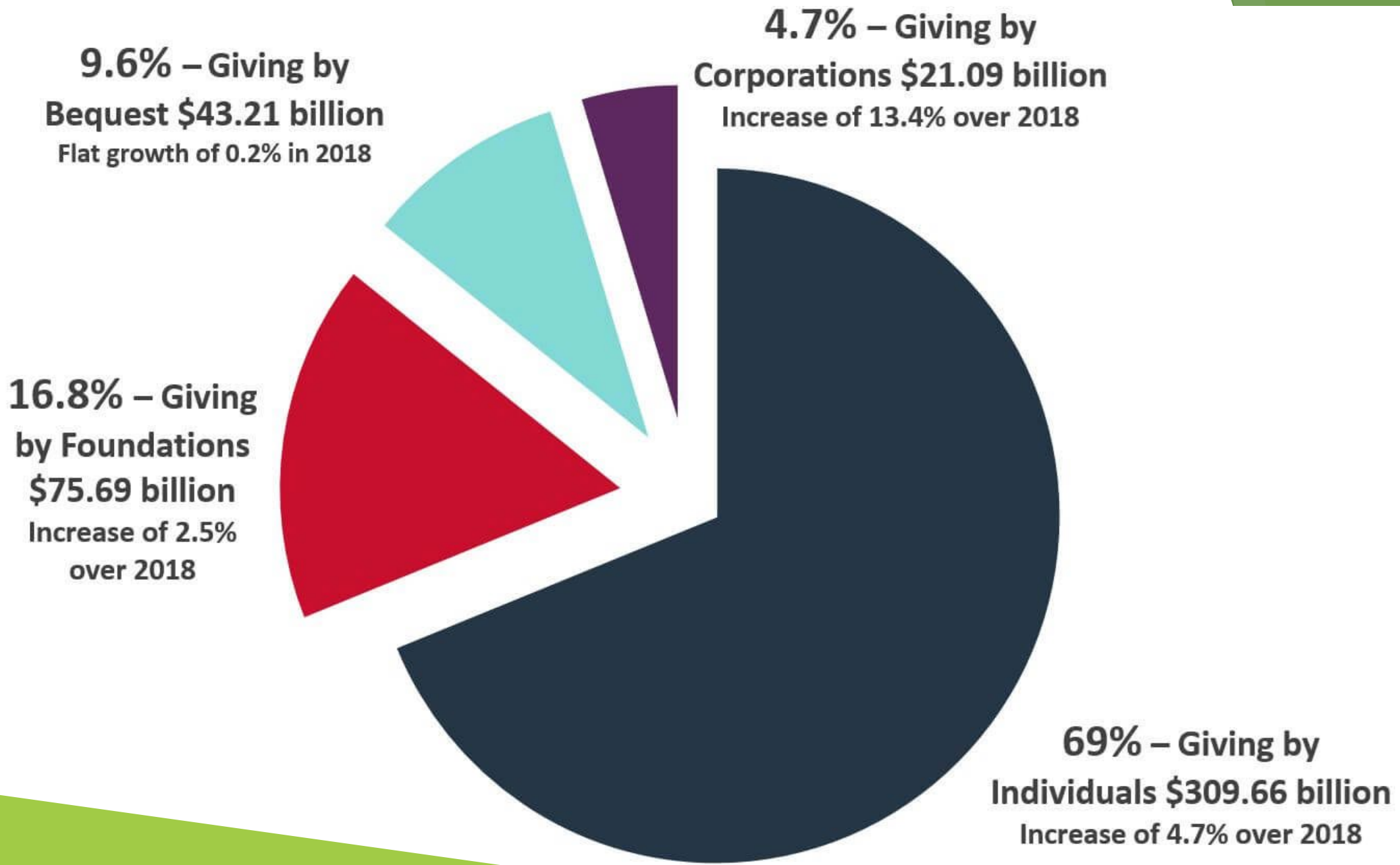
RESULTS: LSLT

Collaborative Approach and Individual Focus

- ▶ Recent Strategic Plan provided LSLT Board with understanding of fundraising goals.
- ▶ LSLT needed an assessment of strengths and weaknesses to understand how to meet these fundraising goals.

MOVING FROM EVENT-BASED FUNDRAISING TO RESOURCE DEVELOPMENT AND FUND RAISING

- Change Board culture around fund raising
- Events are labor intensive
- To raise more money we need a strong individual giving program



IDENTIFYING, CULTIVATING AND RETAINING INDIVIDUAL DONORS

- ▶ Best practices for utilizing the Customer Relations Management software
 - ▶ Proper tracking
 - ▶ Segmenting
 - ▶ Wealth identification
- ▶ Seed money to implement opportunities as identified through the coaching
 - ▶ Network for Good advanced event platform module
 - ▶ DonorSearch wealth identification
 - ▶ Additional coaching calls

LESSONS LEARNED

- ▶ Implementing a CRM program requires capacity!
- ▶ Information is only as good as the records we keep
 - ▶ Switching CRM programs, we lost valuable data that we've had to recreate
- ▶ Engaging the Development Committee is critical to shifting the focus

RESULTS: NEIGHBORSPACE

▶ Segmented donor database into 2 groups

- ▶ September-February Donors, solicited for renewal in October; second appeal in May;
- ▶ March-August Donors, solicited for renewal in April; second appeal in December

▶ Follow-up, follow-up, follow-up

- ▶ One follow-up letter to membership renewal;
- ▶ Two follow-up emails;
- ▶ Board outreach to nonrenewals

RESULTS: NEIGHBORSPACE

▶ New Salesforce Dashboard

- ▶ Compares membership and donations last year to this year
- ▶ Shows new donors this year and those who gave Last Year But Not This (LYBUNT)
- ▶ Shows first renewal rates this year and last
- ▶ Shared with the Fundraising Committee monthly

▶ Thank you's

- ▶ ED handwritten notes to all new donors and donors over \$100
- ▶ Board calls or writes to every donor

EXISTING MEANINGFUL RELATIONSHIPS ALLOW FOR MORE MAGIC



SHARING MESS & SUCCESS

- ▶ Donor letter swaps
- ▶ Grant management resource share
- ▶ Sponsorship Resource Share
- ▶ Event strategies that were too much work
- ▶ Donor solicitations that were too labor-intensive
- ▶ We had the opportunity to learn from each others successes and mishaps

CONSULTANT IDEAS -

The wise leader is often a skeptic of well-meaning experts.

- ▶ Does he know what he's doing?
- ▶ Does he understand the urban land trust and small land trust industry?
- ▶ Do his ideas work or make sense?





BUILDING ON
RELATIONSHIPS
BUILDS
A STRONGER LAND TRUST
MOVEMENT

TRUST

SHARING & VULNERABILITY

INCREASED PARTICIPATION & COMMITMENT

SUPPORTING EACH OTHER & THE CONSULTANT MORE

STRONGER LAND TRUSTS & MORE CONSERVATION

ONE ORGANIZATION MUST LEAD: WHAT MAKES A RELIABLE CHAMPION?



- ▶ Clear about responsibilities and needs
- ▶ Transparency and collaboration on application and process
- ▶ Outlined parameters and expectations of participation
- ▶ Consistent, ongoing follow up
- ▶ Supportive accountability
- ▶ Shared summary results
- ▶ Did the lion's share of the work
- ▶ Has a good rapport with all leaders

EXPERT FACILITATION IS KEY

- ▶ Vouched for theories and practices
- ▶ Tested his practices
- ▶ Shared our experiences as implemented
- ▶ Stood by his tried and true experiences
- ▶ Nurtured a culture of sharing



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TIME COMMITMENT IS HIGH, REQUIRES MUTUAL ACCOUNTABILITY FOR SUCCESS



MORE MONEY WILL ALWAYS BE NEEDED TO SUCCESSFULLY IMPLEMENT RECOMMENDATIONS



BONUS MATERIAL

ADVICE

- Pick one or two themes annually to feature in your newsletters, appeals, annual reports. That way the pieces together represent a continuum of messaging.
- For restricted appeals, develop a policy that says that 15 to 20% of every gift will go to administration.
- If you want to offset the cost of a donor event, place a fishbowl in the back of the room and say that donors are free to make a contribution to offset its costs.
- Consider a mailing house for your appeals, e.g., Allied Printing in Connecticut
- Have you considered having your board chair meet with every board member to engage them on involvement and giving? The questions are, “what would you like to look back on and be proud of, what would you like to do this year?”
- The half-life of a mailing is 12 days, post mailing. This is when half the mail will be opened and is a good time to send a reminder to anyone from whom you haven’t received a gift.

BONUS MATERIAL

RESOURCES

- Writing better appeals

- [Development for Conservation | Need Help Writing Your Spring Appeal Letter?](#)
- [Development for Conservation | Stop Leaning on Numbers to Tell Your Story](#)
- [Development for Conservation | Remember to Ask for Money!](#)
- [Development for Conservation | Writing Better Fundraising Letters](#)
- [Development for Conservation | The Secret That Will Change the Way You Approach Writing Appeal Letters](#)
- [Development for Conservation | One way to Tackle Writing an Appeal Letter](#)
- Jeff Brooks, *A Fundraiser's Guide to Irresistible Communications*

- General Philanthropy

- Tom Ahern, [The Agitator](#) (Blog)

QUESTIONS?

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