

BY Illene Roggensack

Major Donors:

MAJOR OPPORTUNITY FOR YOUR LAND TRUST

In the quest to diversify and stabilize funding sources, there is no better opportunity for the land trust than development of a major donor program. Like other funding strategies, an effective major donor program requires a long-term investment, both “in spirit” and of organizational resources.

What is necessary to making a major donor program work? First, know that the two core truths of fundraising absolutely still apply:

PEOPLE GIVE MONEY TO PEOPLE!

- Of course the work of your land trust is important, but you must be able to convey your mission to donors in such a way that makes them care. Can you connect on a very human level and meet the needs of the donor?

Major donor work calls for development and implementation of individualized strategies. Effective fundraisers ask, “What is in the best interest of this specific donor? How can we best meet his or her needs while furthering the goals of our organization?” Strategies are pursued with the personal interests of the donor in mind:

- Customized cultivation methods—for instance, initially inviting the prospect

Raising funds from major donors provides a genuine opportunity to build relationships.

YOU HAVE TO ASK FOR THE MONEY!

- Writing nice letters, having lunch, getting folks out on the land all are worthwhile cultivation activities. Ultimately, though, major donors must be explicitly asked to get involved, to write a check.

What Makes Major Donors Different?

Raising funds from major donors provides our one genuine opportunity to “build the relationships” we so often speak of in fundraising. While we probably don’t have the luxury of one-on-one efforts with everyone—volunteers and members—we *find* the time to pursue and maintain relationships when working with major donors.

to serve on a land trust advisory council in a capacity that fits his or her expertise or knowledge

- Assignment of best contact people—ideally land trust board members
- Face-to-face solicitation, rather than relying on letters and other indirect methods
- Staying in touch, personalized follow-up
- Recognition of gifts in a manner that is most pleasing to the donor, keeping in mind that not everyone enjoys public acknowledgement

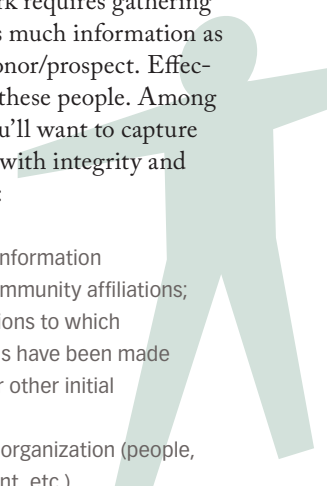
There is a lot of room for creativity in major donor work. Former Land Trust Alliance staffer and major donor guru Chris Herrman loves international


travel; whenever he is out exploring, he carries a list of the major donors/prospects with whom he’s working. He sends these folks postcards and buys trinkets to hand deliver when he returns home. People who don’t understand major donor work think he’s nuts; successful fundraisers understand.

Major donor work requires gathering and maintaining as much information as possible on each donor/prospect. Effectively, we “profile” these people. Among the information you’ll want to capture and store—always with integrity and confidentiality—is:

- Name and contact information
- Professional and community affiliations; names of organizations to which significant donations have been made
- Source of referral or other initial contact point
- Connections to our organization (people, personal involvement, etc.)
- Areas of personal interest (related and unrelated to our work); needs and preferences we are able to meet/address (programmatic, other)
- Special dates (e.g., birthday, anniversary), awards received

Record only the personal information you are comfortable with the donor actually seeing, should the occasion arise. However, you’ll want to have a good feel for additional considerations, such as giving motivators (love of program, tax advantages, public acknowledgement, social drivers, etc.), financial/charitable giving capacity, decision-making style and timeline, and so forth. This information is key to developing individual and customized plans and timelines.





Review whether your land trust has the commitment, resources and structure to develop a major donor program.

Program Consideration, Development and Implementation

Most organizations are not ready for a major donor effort until they are well established; others are initially formed solely due to the efforts of major donors. In assessing your readiness, realistically review whether your land trust has the commitment, resources and structure to develop major donor gifts. Equally important is consideration of organizational culture: Is the profile of your target major donor a good fit with your land trust's image, values and business model? For many land trusts, a \$500 to \$1,000 gift is considered major. Regardless, the dedicated supporter need not be particularly wealthy to be a viable major donor prospect.

If major donor development is a fit, the following activities are required of a successful program:

- 1 Determine your goals in working with major donors.** While you'll want to raise funds and capture repeat donors, you should be able to identify non-financial objectives (e.g., political clout with local elected officials).
- 2 Assess the successes and frustrations associated with previous major donor efforts,** then determine the methods you will use to cultivate, solicit, communicate with and recognize your major donors.
- 3 Continuously develop your prospect list.** The best source will be your existing list of donors and members. Utilize available resources (e.g., board members, public records available

online) to begin the information-gathering and individual-profiling process.

- 4 Develop a strategy for each donor/prospect, then implement it.** Take the long view. My mentors in fundraising have a rule-of-thumb that they spend time with a prospect for two years before suggesting a financial gift.
- 5 Include major donors/prospects as one of your most important audiences** when pursuing more general communications. Add these names to distribution lists for newsletters, etc., but be sure to remove them from other lists so that they don't receive inappropriate letter solicitations and membership renewals.
- 6 Keep up-to-date records** on both formal and informal direct contacts made with the donor/prospect, including any insights gained in the process.
- 7 Involve board members and other volunteers** as much as possible, providing solid training in donor development, and clearly stating and monitoring adherence to duties and boundaries. Celebrate the large and small victories of these volunteers as they attempt what most consider the most difficult form of fundraising—face-to-face work with people who can write checks of substantial size.
- 8 Make available the tools that will help to cultivate donors;** my personal belief is that your greatest fundraising tool—particularly with major donors—is an up-to-date organizational/lands strategic plan.

- 9 Know that two essential systems are required to support an effective major donor program: a good database system** (hardware and software, as well as usage policies and practices, personnel and training) and **a donor communications plan that allows for frequent and consistent contact.** Additionally, utilizing systems for quality control, follow-up (including financial accounting and receipts) and donor recognition are important. It will hurt more than help when you get a donor to say "YES" but then are unable to reciprocate effectively by doing your part to collect, acknowledge and utilize the gift.

- 10 Know that this program will require perseverance.** Unfortunately, major donor development is not a self-sufficient, self-motivated system. Rather, it will require ongoing nurturing by the land trust staff or volunteers.

One Last Note

Starting and running a major donor program is a frequent topic at Rally. Come learn from proven leaders in this field who give seminars and workshops on the topic. See you there! 🌱

ILLENE ROGGENSACK IS THE PRESIDENT OF THIRD SECTOR INNOVATIONS, BASED IN GRAND JUNCTION, COLORADO. SHE IS A FREQUENT PRESENTER AT RALLY AND REGIONAL CONFERENCES ON FUNDRAISING AND ORGANIZATIONAL DEVELOPMENT, AND WORKS WITH NUMEROUS LOCAL LAND TRUSTS AND OTHER NONPROFIT ORGANIZATIONS IN THE WEST.