

## A DIALOG ON FUNDRAISING TRENDS IN 2013

**M**arc Smiley, with Solid Ground Consulting in Portland, Oregon, and Illene Roggensack, with Third Sector Innovations in Grand Junction, Colorado, have nearly four decades of combined fundraising expertise. Here they chat about where they see land trust fundraising heading in 2013.



**Marc:** Hello, Illene! I think it's finally going to be a prosperous and productive fundraising year for land trusts. The economy might not be completely out of the water, but I see people looking forward. What do you think we can expect in 2013 for fundraising?

**Illene:** Marc, even though the economy isn't recovering as quickly as we'd like, interestingly, the one form of charitable giving that has kept pace with the recovery has been gifts from individuals.

But, I think we need to be aware that the "price" of giving continues to increase. And that the savvy land

trust really needs to look at the value proposition it presents to prospective donors, to make certain that donors are well aware of *how* and *why* investing in the land trust is preferable to putting resources—charitable or otherwise—elsewhere.

I believe the most compelling value proposition the land trust can present is "community." Not community in the sense of a geographic place, but the gathering of donors, volunteers and other like-minded individuals, where all can be part of important work, and both give and receive meaningfully. This sort of culture is rare, but many land trusts have created and maintain it. The invitation to be in a community is a strong one and is highly conducive to garnering the financial and other resources needed to continue the land trust's good work.

**Marc:** Yes, creating a culture of fundraising—including a culture of accountability—is critical. Land trusts bring people together to save land, but it's really time for them to look at how they can become community institutions. Land trusts that protect land forever need to be here forever, and that means they need to get serious about fundraising. I see more land trusts engaged in very intentional discussions about how to make fundraising work. That almost always comes down to two things.

First, fundraising needs leadership. Someone has to be a champion both to motivate, and when necessary, hold people accountable.

Second, fundraising needs a plan. There is a difference between vision and hallucination. A plan makes the ideals and aspirations real.

2013 is the perfect time to have these conversations and commit to these plans. There seems to be a move toward capital and planned giving programs, providing for bigger and more substantial gifts that have the ability to make a profound and legacy-level impact.

I also think we're going to see a growing emphasis on using the Internet more effectively to support fundraising.

**Illene:** I have always thought that courting and soliciting larger gifts is a good fit for land trusts as they promote what I've heard you call the "audacity of perpetuity." This

“audacity” has a lot of positives, including positioning land trusts in the minds of donors as a highly legitimate place to invest, to entrust substantial resources, to leave a legacy.

Regardless of the methodology and tools employed, there always is far more fund development opportunity than there are time and resources to pursue the opportunities. Most land trusts don’t have enough staff—or board members with adequate time, skills or interest—to effectively pursue new forms of fundraising (e.g., via the Internet) or put together something as daunting as a planned giving program or a capital campaign. It is hard to know how to advise the willing but time/capacity-strapped land trust.

**Marc:** I completely agree. For most land trusts, the limitation is not on the number of donors, but on the number of *relationship builders* inside the organization. If a land trust can fix that problem, good things will happen.

We need more volunteers involved—people who can truly make a difference. I think the typical advisory council isn’t very effective. Groups that have them just don’t use them well, or worse, don’t use them at all.

I’m far more convinced of the model that engages a trustees’ council or leadership council. Trustees are fully engaged donors willing to step up to a greater degree of involvement by having a short, personal action plan that defines activities they are willing to do in support of the fundraising effort. These folks are great friend-raisers, credible voices of support, and want to help. We just need to give them simple and meaningful ways to do that.

**Illene:** I like it! And, something like a trustees’ council can help the land trust battle the giants in its own mind... in that the barriers to effective fundraising really are our own, not our donors’.

The best starting point for a land trust that wants to get serious about fundraising is to sit down—in a retreat, as part of an extended board meeting, with a trusted expert—to examine each involved individual’s (board, staff, trustee) “relationship with fundraising.” Once the beliefs about fund development are exposed, you can start debunking the many myths and misinformation that is out there. Then you must address the fears that each individual has about how fundraising works, and help each person find a place where he or she can be comfortably involved in the process—perhaps in researching prospects, hosting long-time supporters’ visits to protected properties, just saying ‘thank you’... even learning to effectively solicit gifts. All of these

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- an “Ambassador Checklist”
- a “Board of Directors Fundraising Interests” form
- a “Give and Get Commitment” form (board member fundraising agreement)

are important aspects of what you and I call “the fund development cycle.”

I know that you have helped lots of land trusts to raise funds, Marc, but perhaps more importantly you have helped them realize and believe that they actually *can* raise funds.

**Marc:** I think that’s it exactly. If groups think they can, they do it. And, if people think more about building relationships and less about “shaking people down for money,” they’ll enjoy it more *and* be more successful.

I also believe that success is dependent on a solid fund development plan. Too often, these plans are seen as complicated detailed tomes—that’s not what I’m suggesting. It’s really pretty simple: what are you trying to accomplish? Usually it’s not only more money, but more stability, more flexibility, perhaps even more community “ownership” in the organization. Those are all fundraising goals. Then comes the strategy part, and here’s where a lot of groups flounder. I try to help groups look pretty closely at how they’re going to do this. A huge part of it should be about relationship building. But I would say for most land trusts, it’s also getting real about what they’re doing with events. Are they intended to raise money—if so they should raise net revenue, not just cover costs. Are they intended to build relationships—if so, then at the end of the event, the organization should have more insights into their donors, more understanding of why they give and more openings to new supporters who are interested in getting involved.

Then comes the part about getting people involved in following through. This is one part education (it truly is easier than people think), one part motivation (someone needs to cheer us on) and one part accountability (if we’re serious about it we need to hold ourselves accountable for it). If there is a strong commitment to a culture of fundraising and true leadership, this kind of planning is easy and makes everyone feel better about it.

**Illene:** So right! Successful fundraising is one of the single investments that makes the greatest difference for a land trust. 🌱