

*CENTRAL PENNSYLVANIA CONSERVANCY*

**Fundraising Plan**

**February 2006**

*OVERVIEW OF THE FUNDRAISING PLAN*

***Background***

Central Pennsylvania Conservancy (CPC) was founded in 1981 to address pressing environmental concerns in the greater Harrisburg region. CPC's mission has evolved to focus on land conservation that protects the natural and cultural resources of the central Pennsylvania region. We work under the motto, "Conserving for Tomorrow...Today." CPC has had many successes through the years operating largely as an all-volunteer organization guided by a very enthusiastic Board of Directors and supported by a membership dedicated to preserving the region's high quality of life.

***Strategic Direction for the Central Pennsylvania Conservancy***

The Conservancy's mission is to conserve natural and cultural resources for the benefit of current and future generations through the protection of open space in the central Pennsylvania region. CPC will achieve that mission by ensuring that:

1. The most important natural and cultural resources of the region are preserved in perpetuity.
2. Communities in the region embrace private land conservation as a tool to protect important community values.
3. The Conservancy has the organizational structure and capacity to fulfill its mission and achieve its long-term vision.
4. The Conservancy has a stable and growing base of financial support.

From these goal areas, more specific strategies have been developed. For the purposes of the fundraising plan, the functional areas of the plan have been narrowed to six different programmatic areas, plus an additional reserve fund area:

- **Non-Capital Conservation** – this includes all efforts to negotiate and acquire land and easements. This does not include the actual land costs.
- **Stewardship** – this includes the ongoing costs of managing the land and easements that CPC has protected. These expenses need to be covered in perpetuity.
- **Public Education/Outreach** – this includes the costs of building awareness about conservation and benefits it offers to the community. It also includes education about the benefits of nature and open space to the people living with nature.
- **Special Projects** – this includes costs associated with primarily grant driven initiatives like conservation planning projects. While these projects may have components included under one of the other areas like Public Education/Outreach or Administration, a portion will be restricted.
- **Fundraising** – this includes the direct costs of raising money to support the needs of the organization.
- **Administration** – this includes the direct costs of administratively supporting all programs within the Conservancy.

### ***Description of Fundraising Sources***

Central Pennsylvania Conservancy will be developing a range of funding sources to support the work of the organization. These sources in the past have relied primarily on giving from individuals and grants. As the group evolves, it plans to add other sources of revenue to support its work. The following activities are included in the current fundraising program.

#### **1. Memberships and Donations**

- Staff and Board of Directors of the Conservancy are considering various techniques for new member acquisition. The most likely to be implemented in the near future will be member-get-a-member drives and direct mail to rented lists from like-minded organizations for the central Pennsylvania region. These organizations include The Nature Conservancy, Sierra Club, Pa. Federation of Sportsmen's Clubs and Pa. Fish & Boat Commission Angler magazine subscribers among others. Additionally, the Conservancy is developing a more aggressive approach to targeting Commonwealth employees living in the central Pennsylvania region for membership. These employees, especially those of the natural resource and environmental agencies, are very likely to support the work of the Conservancy as members. Lastly, Conservancy staff is implementing a plan to meet monthly with Board members to collect names of personal contacts that are potential new members. The Board and staff members will work together to solicit those contacts for membership.
- Conservancy staff is implementing a new, more aggressive membership renewal process starting in the first quarter of 2006. This renewal process will be coupled with a more aggressive appeal schedule. Member renewal dates will be pushed to the last day of the quarter in which they join. Renewal notices for each quarter will be sent at the beginning of the quarter for all members expiring at the end of that quarter. All other members will receive an appeal solicitation. Second, third and fourth notices will be added to the renewal process. At the beginning of the next quarter, all members expiring at the end of that quarter will be mailed a renewal notice. All members who failed to renew from the previous quarter will receive a second notice and all other members will receive an appeal solicitation. The following quarter will continue with second and third notices going out to all non-renewing members and so on. In this manner, all members will receive four appeals per year, for those who renew on time, the mailings will consist of one renewal notice and three appeals. Members who do not respond after 18 months will be dropped from the membership list. During that time period, they will have received six renewal notices as well as six quarterly newsletters, all containing a membership remittance envelope.
- The Conservancy is currently at approximately 600 members. This represents more than double the number of members in June 2004. This membership increase was the result of a combination of better database maintenance, increased renewal requests to expired members and better visibility achieved with the addition of staff. With the proposed increase in membership acquisition activity, the Conservancy anticipates the addition of 500 new members per year for the three-year period covered by this plan. A stable

membership of 2,000 by the end of 2008 is the Conservancy's goal. Given the Conservancy's large geographic scope, this should be very attainable.

- The Conservancy anticipates investing significant resources immediately in membership growth. This is crucial for the necessary unrestricted funding it will require to support staff and additional development activities. It is anticipated that a part-time development staff person will be brought on by mid-2006 as the membership development activities begin to increase. New outreach material, renewal/remittance envelopes and appeal pieces will need to be developed. Additionally, it is anticipated that the Conservancy will move to an increased use of its website to solicit and acquire new members, as well as permit online membership renewals and scheduling of automatic membership payments.
- Staff is compiling lists of current and expired corporate/business members and supporters. Corporate members will be contacted in an effort to increase giving level and get corporate sponsorships for CPC events and operational costs. New businesses will be approached for new corporate memberships.

## **2. Major Donors**

- Staff and board members recognize the urgent need to build a major donor program. Currently, only approximately 18% of membership income comes from individuals giving more than \$500 annually. Approximately 14% of membership income comes from individuals giving \$1,000 or more annually with none giving significantly more than \$1,000 annually. Major donors, defined as those individuals giving at least \$500 annually number only approximately eight individuals.
- To date, the Conservancy has not formalized any planned giving programs.

## **3. Grants.**

- The Conservancy has been very successful in obtaining grants, both governmental and from private foundations. Governmental grants typically support at least half of all acquisition projects. In 2004 and 2005, governmental grants have been received for \$40,000 and \$50,000 respectively that represent unrestricted operating revenue. Additionally, governmental grants awarded in 2005 will support projects in 2006 and 2007 for a total of \$130,000.
- In 2003, the Conservancy received a start-up grant of \$100,000 from the Mellon Foundation that enabled the Conservancy to hire a full-time Executive Director for two years. This funding ended in September 2005 and was not renewed. A significant capacity-building foundation grant that would provide multi-year support should be a high priority for the Conservancy in early 2006.
- Grants support 68% of the Conservancy's operating budget for 2006. This heavy reliance on grants should be reduced in subsequent years. The heaviest reliance on grants is in the areas typically supported by other forms of unrestricted revenue including, administration, fundraising and outreach. As membership and donor development increases unrestricted revenue from those sources, reliance on grants supporting the operating budget falls to

approximately 33% in 2007 and 26% in 2008. Most of this grant support will be for special projects and non-capital portions of acquisition projects. This grant support will be highly restricted. However, it is anticipated that the Conservancy may continue to receive \$40,000 - \$50,000 annually in unrestricted governmental grants.

- The Conservancy has good relationships with several foundations that provide recurring revenue. Much of this is semi-restricted to particular geographic areas or outcomes. No distinguishment is made between governmental and foundation grants for operational budgeting. Grants are allocated to functional budget areas depending on whether they are restricted or unrestricted.

#### **4. Fees/Income.**

- The Conservancy currently does not engage in fee-for-service activities. Opportunities for staff to consult or contract on projects within their scope of expertise should be explored as opportunities arise and resources permit.

#### **5. Other Sources.**

- The Conservancy holds an annual awards banquet as a potential fundraising event. Lack of volunteer support in planning the event has lead to staff overseeing this and negates any minimal revenue that is generated. The event is currently a successful “friendraiser” but not a significant fundraiser. It does have the potential, with an increasing membership, to be a more significant fundraising event in the future.
- In 2005, the Conservancy held its first sporting clays fundraising shoot. This event has the potential to generate \$5,000 - \$10,000 annually.
- Also, in 2005, the Conservancy held its first raffle of a donated gun and hunt. This generated \$1,000 in revenue but has the potential to generate significantly more. Spring and fall raffles are planned for 2006, with the spring prizes geared toward boating, hiking or biking enthusiasts and the fall raffle continued to focus on hunting/shooting in conjunction with the annual sporting clays fundraising shoot.
- Staff, board members and friends of the Conservancy that are Commonwealth employees are working to have the Conservancy placed on the State Employee Work Place Giving program administered through the United Way.
- The Conservancy has received a few memorial donations, typically set up by coworkers of a deceased state agency worker or the family of a deceased Conservancy member. Those memorial donations are sporadic and make up a negligible and unpredictable source of revenue.

### ***FUNDRAISING DIRECTION***

#### ***Fundraising Outcomes***

The Central Pennsylvania Conservancy has defined several outcomes that will be accomplished

through the implementation of this plan. These outcomes support the strategic plan goal of creating an efficient and effective organization capable of assisting landowners in the protection and stewardship of natural and cultural lands.

- 1. Increased percentage of unrestricted revenue.** Unrestricted revenue is essential for program flexibility and to respond to emerging opportunities and threats. For the Conservancy, the largest source of unrestricted money will come from annual contributions from individuals and major donors. Other entrepreneurial opportunities that generate fees will also be explored to support development of unrestricted revenue.
- 2. Diverse revenue sources that minimize reliance on any single source of revenue, especially for non-capital expenses.** Currently, funding for the Conservancy comes from a very few sources. Over time this reliance on a few sources will be a significant challenge. In the next five years, it will be critical for the Conservancy to reduce the percentage of funding coming from foundations to support base operations, and to direct grant funding in the future to specific project initiations and short-term projects.
- 3. Stability of funding from all sources.** The work of the Conservancy is long-term. Stability is vital to ensure the organization can plan and execute its programs over time. In addition, retaining the commitment of current supporters is significantly more effective and efficient than having to build new relationships over and over.
- 4. A growing membership in the Conservancy.** The Conservancy is working hard to increase the membership of the Conservancy, and seeks a base membership of more than 1000 members during the timeframe of this plan. For the purposes of this outcome, major donors will be considered as members.

### *Strategies for Growth*

The Conservancy has adopted specific strategies to achieve the outcomes of this plan. These strategies provide an overall approach to Conservancy fundraising activities. They attempt to bring our most creative and innovative thinking into the effort to raise money.

- 1. Invest heavily in capacity-building steps that improve our ability to raise money.** The needs and expectations for fundraising in the future exceed the Conservancy's ability to raise money today. The Conservancy must increase its capacity for fundraising by investing in the development of its personnel (staff, board members and other volunteers), systems and structure.
- 2. Develop the capabilities of the Board of Directors to lead major donor fundraising efforts.** The growth of the Conservancy over the next three years will depend on having the people involved who can help lead the organization to the next level. This includes people with a variety of skills, connections and demographics. Perhaps the greatest of these in the short-term is a small group of board members capable and committed to raise money to support the Conservancy through personal solicitation of support from other major donors. This group would form the core of the fundraising efforts, likely working as a fundraising committee for the Board. The success of this group will almost certainly define the success of the entire organization over time.

3. **Hire professional staff to support the organization's fundraising efforts.** The organization needs to complement current staff functions with a fulltime professional to support fundraising. Building the staff infrastructure to support an executive director with significant fundraising capabilities, a development director, a land conservation director and an administrator will support the level of fundraising anticipated in this plan, as well as the other program activities defined in the strategic plan.
4. **Emphasizes long-term relationships in all efforts to raise funds.** Fundraising success for the Conservancy will require investment and support from donors and other supporters for generations. Therefore, the Conservancy must develop programs that build relationships as the cornerstone of fundraising effectiveness. This may require greater investment up-front that reduces net revenue for some programs in the short-term. However, the long-term benefits should far exceed any limitations that come as a result of investing in relationships for the long run.
5. **Seek multi-year commitments to support Conservancy activities when requesting support from donors and grantors.** Funders and supporters often are not prepared to make a long-term commitment to support the Conservancy until we have clearly established our credibility to them. Yet longer-term commitments will make it possible to focus attention on the activities for which the organization was created. Seeking support that includes longer-term commitments may be an important strategy to ensure the "investment" in the organization is a solid one.

## *FUNDRAISING POLICIES*

### **Conservancy Membership Program**

Anyone who has within the last 18 months given a cash contribution of any amount, or an in-kind contribution that provides benefit to the work of the Conservancy, will be considered a *member* of the Conservancy. The organization will develop a benefits and recognition program for members, and assist staff in its implementation. Those members whose cumulative contributions equal or exceed \$500 annually will be classified as *major donors* to the Conservancy, and will be given all recognition and privileges associated with their giving level.

### **Board Fundraising**

The board will provide direct support in fundraising activities. This support will be coordinated by the Fundraising Committee, which will make recommendations to the board regarding the appropriate activities and roles for involvement of other board members. A minimum level of involvement by board members will include a "leadership" gift as a member. A "leadership" gift is defined as a "significant contribution to the organization based on one's individual financial abilities." It is anticipated that a board member's leadership gift will equal \$500 or can be combined with other fundraising efforts to equal \$500 annually.

### **Fundraising Plan**

The Conservancy will renew its fundraising plan at least every three years in conjunction with renewal of its strategic plan. If annual strategic plan reviews result in significant changes to that plan, the fundraising plan should be modified accordingly. The plan will define fundraising outcomes, strategies and activities based on the programs and priorities established in the strategic plan. The plan will create a framework within which all fundraising programs will take place. Each plan will include a review of existing fundraising policies and offer recommendations for revisions and additions. The Board of Directors will be responsible for developing and approving the plan.

### **Restricted Grants and Gifts**

Contributions accepted by the Conservancy will be used to support the mission and goals of the organization. The Conservancy will accept restricted contributions from any source, so long as the grant or gift are consistent with the mission, goals and program priorities established in the strategic plan and fundraising plan. Until a set of suitable sponsorship guidelines have been adopted by the Board of Directors, any donation given in exchange for an endorsement, sponsorship or similar commitment to a donor must be approved by the board prior to acceptance.

## ***FUNDRAISING IMPLEMENTATION***

The following implementation outline is not intended to span the time period of CPC's 2005 – 2008 strategic plan. Instead, it is an outline of priority actions to be undertaken in the first year with the intention of evaluating fundraising successes on an annual basis and adjusting the fundraising plan accordingly. It is assumed this evaluation will occur as part of the board of directors and staff planning strategic planning retreat to be held in June of each year.

### **1. Memberships and Donations**

- a. Develop new organizational literature for general, major donor and corporate memberships
  - i. Strategic Plan Executive Summary
  - ii. New membership brochures
    1. general
    2. corporate
    3. major donors
  - iii. Project pamphlets
  - iv. Municipal open space initiative papers
- b. Work with Outreach Committee and communications firm to develop marketing plan
- c. Rent/trade membership lists
  - i. TNC, Sierra Club, NWF, Pa. Federation of Sportsmen's Clubs

- ii. Pa. Fish & Boat Commission Angler magazine, Pa. Game News subscriber lists
- iii. County Conservation Districts
- d. Annual member-get-a-member campaign
- e. Direct mailings to lists based on geographic area and conservation issue (i.e. Blue Mountain mailing re: encroaching development)
- f. Acquire personal contact lists from board members
- g. Initiate quarterly renewal/appeal schedule
- h. Solicit state employees through agency contacts
- i. Meet with current and expired corporate members for upgrades; solicit two new corporate members monthly
- j. Attend various conferences, symposia and meetings with CPC presentation, display and membership materials
  - i. Pa. Farm Show
  - ii. Eastern Sports & Outdoors Show
  - iii. Pa. Garden Expo
  - iv. Harrisburg Arts Festival
  - v. Mechanicsburg Heritage Days
  - vi. Boiling Springs Foundry Day
  - vii. Susquehanna Riverfront Festival
  - viii. WRCF Conservation Festival
  - ix. Chamber of Commerce presentations (Capital Region, West Shore, Carlisle, Shippensburg, etc.)
  - x. Presentations to community organizations (Kiwanis, etc.)

## **2. Major Donors**

- a. Begin identification and personal cultivation of potential major donors, target minimum five per year

## **3. Grants**

- a. Secure a substantial foundation capacity-building grant in 2006, structure for multi-year support if possible
- b. Submit annual land acquisition grant to DCNR for current project(s)
- c. Explore non-acquisition (special) project grants with agencies, foundations and corporations

- i. Growing Greener (DEP)
  - ii. Conservation Planning grants (C2P2 – DCNR)
  - iii. DCED grants
  - iv. WPWPP
  - v. Various foundations
- d. Submit at least one administrative grant request per month to a donor, foundation or corporation requesting a minimum of \$5,000
  - i. Prior to each submission, complete potential donor research work, contact and meet with appropriate donor decision maker(s)
- e. Submit annual DCED grant for administrative support

#### **4. Fees/Income**

- a. Explore opportunities to implement fee-for-service program providing technical assistance, project assistance, etc. through contracts

#### **5. Other Sources**

- a. Continue to expand annual awards banquet/auction as fundraiser
- b. Expand annual sporting clays fundraising shoot through outreach to shooting clubs, sportsman associations, etc.
- c. Hold two raffles per year of donated items (i.e. hiking/boating related in the spring, gun/hunting related in the fall)
- d. Get CPC listed on State Employee Workplace Giving Program administered through United Way
- e. Promote memorial giving, planned giving and living trusts