



TRAINING MATERIALS

Marc Smiley Organizational Development ©

Good Lands Trust ANNUAL GIVING PLAN

I. PLAN OVERVIEW

The purpose of the Good Lands Trust Annual Giving Program is to obtain unrestricted funds for Trust operations. The Trust has been successful in drawing restricted funds for the purpose of land protection from a variety of sources, and needs the complementary funding from individuals to support operations.

The annual giving program provides donors, at varying levels, with the opportunity to invest in an organization they believe will make positive changes in the community. The resulting donor base opens doors to major contributions, corporate and foundation giving and planned gifts. Finally, a strong and plentiful donor base helps carry the message of the organization at far greater levels than the staff and Board can achieve alone.

The process for developing this plan occurred in three phases. The first phase consisted of a strategic planning workshop conducted by Marc Smiley in March 2002. The second phase included a draft annual giving plan written and submitted by Fred Lear for review. The third phase consisted of compilation of workshop information and Fred's draft plan into this document.

II. DEFINITIONS

Member Levels

\$500+	Benefactor
\$100-499	Sustaining Member
\$36-99	Supporter
\$<35	Basic Membership

III. GOALS

First year goals of the annual giving program are based on 2001 giving levels. All annual giving program donations will be categorized as unrestricted funds.

Goals for the four levels of membership in the Trust include:

Benefactor:	Renew previous year's gift at same or increased level
Sustaining:	All donors double previous year's gift

Supporter: Request additional beginning of year gift (no amount specified)

Basic Member: Membership renewal at \$35 or less

IV. PROGRAM ELEMENTS

The first step in implementing an annual giving program is to develop a strategy incorporating the following tasks:

- Form a campaign committee
- Develop a budget
- Identify prospects including personal, business and corporate contacts
- Set campaign goals
- Establish campaign timeline
- Identify and secure recognition items
- Segment prospects into current or potential giving levels
- Identify/create solicitation tools (letters, phone script, visit outline, etc.)
- Assign volunteers to solicit donations (where appropriate)
- Establish mailing schedule for all correspondence elements
- Train campaign volunteers
- Conduct requests for funding through personal visits, phone calls or mailings
- Recognize contributions and thank donors
- Evaluate success

Types of giving fall into six categories:

- 1) Acquisitions (first-time donors)
- 2) Renewals (second-time donors)
- 3) Retention (habitual donors)
- 4) Giving Club Donors (upgrades)
- 5) Major Donors (benefactors giving over \$500)
- 6) Perpetual donors (planned giving)

The first two years of the Trust's annual giving program will focus on acquisitions, renewals, upgrades and major donors. The Trust will rely heavily on the names and contacts made through previous events and outreach activities.

At every level of giving, a distinct solicitation vehicle, message and process will be utilized. However, as the Trust undertakes the campaign, it will incorporate the following principles:

- The more personal the solicitation, the greater its chances of success. Therefore, a more personal approach will be applied with the largest contributors.
- Campaign volunteers are much more effective when they have given themselves. Therefore, all people asking for money will first be asked to make a contribution themselves.
- People's ability to give varies on a monthly basis. Therefore, solicitations will be conducted at several intervals over the year.
- People invest in their community – show them why your organization is worth the investment. Therefore, the Trust will develop specific “results” that donors will be asked to support with their contributions (even if those results focus on organizational capacity.)
- Any contribution to the Trust can be valuable, regardless of size, and can open the contributor to a greater level of giving. Therefore, any contribution to the Trust – cash or in-kind contributions of true value – will be acknowledged as a membership contribution.

A. Solicitation Process for Acquisition of New Members

Acquisition efforts will focus on getting donors to contribute to the Trust for the first time at a low, introductory level. Mailing lists will be drawn from Trust events and contact, shared lists with other similar organizations and, when appropriate, from mailing houses.

Any unsolicited contributions or contributions received from personal requests, newsletters, brochures, etc. will be included in this acquisition process. All contributions, regardless of level, will constitute a “membership” contribution, and will initiate the renewal process. Contributions will be acknowledged with a letter to inform the contributor that they are now a “member” of the Trust.

Vehicle – Letter mailed with four pieces:

- Letter of up to four pages using a second color and underlining to emphasize key points
- Return response form, personalized whenever possible. Response gives prospect a “gift string” that provides three options for giving to the Trust at \$50, \$100 and Other.

- Return envelope
- Outside envelope, using outside printing when appropriate

Message

- Compelling description of Trust programs highlighting accomplishments in protecting agricultural lands.
- “Leveraging” benefits of extending contributions from donors many times over with outside grants and contracts.
- Urgency of program efforts, and a compelling reason for people to join NOW.
- Photograph or graphic of appropriate and compelling landscape printed within letter.

Process

- Develop mailing schedule
- Acquire and organize mailing lists
- Develop mailing materials
- Coordinate mailing schedule with mailing house
- Develop “thank you” acknowledgement letter template
- Process contributions including sending acknowledgement letters

B. Solicitation Process Renewal of Current Members

Renewals will be sent to basic and supporting members that have given a contribution to the organization in the last 14 months (renewals for sustaining and benefactor levels renewed using special appeal process below). Renewals will be sent as if the member is a “member of the Trust family,” and will not emphasize the reasons for giving as completely as other solicitation tools. If possible, the letters will attempt to resemble a “bill,” in hopes that the member will treat it as one.

Renewals will be sent for up to four consecutive months following the anniversary of the contribution. After four months, people who have not renewed will be moved to the acquisition mailing lists in attempt to gain them back as members.

Vehicle – Letter created to resemble a bill, with the following elements:

- Personalized return response form with amount of previous years *total* giving listed, along with a next higher giving level and an Other category.

A section of the renewal will highlight accomplishments from the last year.

- Return envelope.
- Outside envelope, personalized to the donor and having some outside printing, when appropriate.

Message

- Thank you for your continuing support of the Trust. With your support, we have been able to accomplish the following results (list major accomplishments of the previous year).
- Members are encouraged to become “Tree Free Givers” as part of a monthly or quarterly giving club. Contributions can be made electronically using direct deposit or credit cards.
- Please let us know if any of our contact information is wrong so we can keep our records accurate.

C. Solicitation Process for Benefactor/Sustaining Membership renewals, “Special Appeals” and Special Upgrade Contributions

A more personalized process will be used for larger contributions, special appeals at every level and for upgrading members who have given consistently at a particular level. The following solicitation process will be utilized at each giving level:

Benefactors and Selected Sustaining Members with potential for making benefactor-level donations

Vehicle – Face-to-face solicitation with personal contact by the executive director and/or board member

Message

- Thank and acknowledge benefactor for previous gift
- Provide progress report on Trust activities and finances
- Describe new annual giving program and need for giving on a regular quarterly basis to help stabilize Trust finances
- Communicate how funds will be utilized
- Commit to keeping donors informed of progress
- Encourage donors to offer comments and suggestions
- Solicit new potential donor names

- Request donor give same or larger gift as previous year (on anniversary date)
- Offer to send quarterly reminder on 3/15, 6/15, 9/15 and 12/15
- Communicate how donor will be recognized

Process

- Personal contact calls donor to set up meeting
- Meeting held
- Follow-up letter to thank donor for visit and gift
- Deliver recognition item

Sustaining Members

Vehicle – Personal phone call with personal contact from board, staff or campaign volunteer

Message

- Thank donor for previous gift
- Acknowledge donor as part of core donor pool
- Provide progress report on Trust activities and finances
- Describe new annual giving program and need for giving on a regular quarterly basis to help stabilize Trust finances
- Communicate how funds will be utilized
- Request donor double contribution from previous year
- Ask donor to consider moving into benefactor category
- Offer to send quarterly reminder on 3/15, 6/15, 9/15 and 12/15
- Communicate how donor will be recognized

Process

- Send letter to inform donor you will be calling them (include newsletter)
- Personal phone call made
- Follow-up letter to thank donor for gift
- Deliver recognition item

Supporting/Basic Member Upgrades

Vehicle – Personal letter

Message

- Thank donor for previous gift
- Provide progress report on Trust activities and finances (include newsletter)
- Describe new annual giving program and need for giving on a regular quarterly basis to help stabilize Trust finances
- Request donor make beginning of year contribution
- Ask donor to consider moving into sustaining member category
- Communicate how donor will be recognized

Process

- Send personal letter
- Follow-up letter to thank donor for gift (if appropriate)
- Deliver recognition item

V. MAILING SCHEDULE FOR SPECIAL APPEALS TO CURRENT DONORS

Four personal letter solicitations detailing Trust progress and activities will be sent to current and potential donors throughout the year. Mail dates and key messages are as follows:

March 1	Request to help get the year underway
June 1	Donors should look forward to annual event in September and in the interim, please consider a mid-year gift
November 1	Hope donors enjoyed annual event, please consider a year-end gift
December 15	For those who haven't sent in their gift, please remember the Trust for a year-end contribution and tax planning purposes

A letter will also be sent August 1 to announce the September annual event.