

Campaign Preparation:

Dotting your I's and Crossing your T's

Wednesday, March 15, 2017

Campbell & Company CELEBRATING 40 YEARS

Fundraising • Communications • Executive Search • Strategic Information Services

Webinar Best Practices

1. Close any programs (other than GoToWebinar) that are running on your computer
2. Call-in using a telephone instead of using your computer speakers
3. Move your cell phone away from your computer
4. If you experience visual issues, send a chat to Campbell & Company or contact GoTo at (800) 263-6317

Our Speakers



Jake DeMoe

Deputy Director of Philanthropy
The Nature Conservancy in California



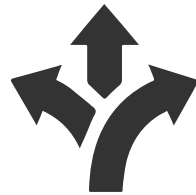
Craig Hightower

Vice President & Director, Western Region
Campbell & Company

What we will cover today...



Background
on The
Nature
Conservancy



What they did
to prepare for
a campaign
launch



Where they
are now and
challenges
ahead



Questions
from
participants

POLL:

**How many of you are
thinking about
launching a
campaign?**



POLL:

**How many of you are
currently in a
campaign?**



The Nature Conservancy

- › National organization
- › California chapter
- › National / local priorities
- › National support
- › Local fundraising

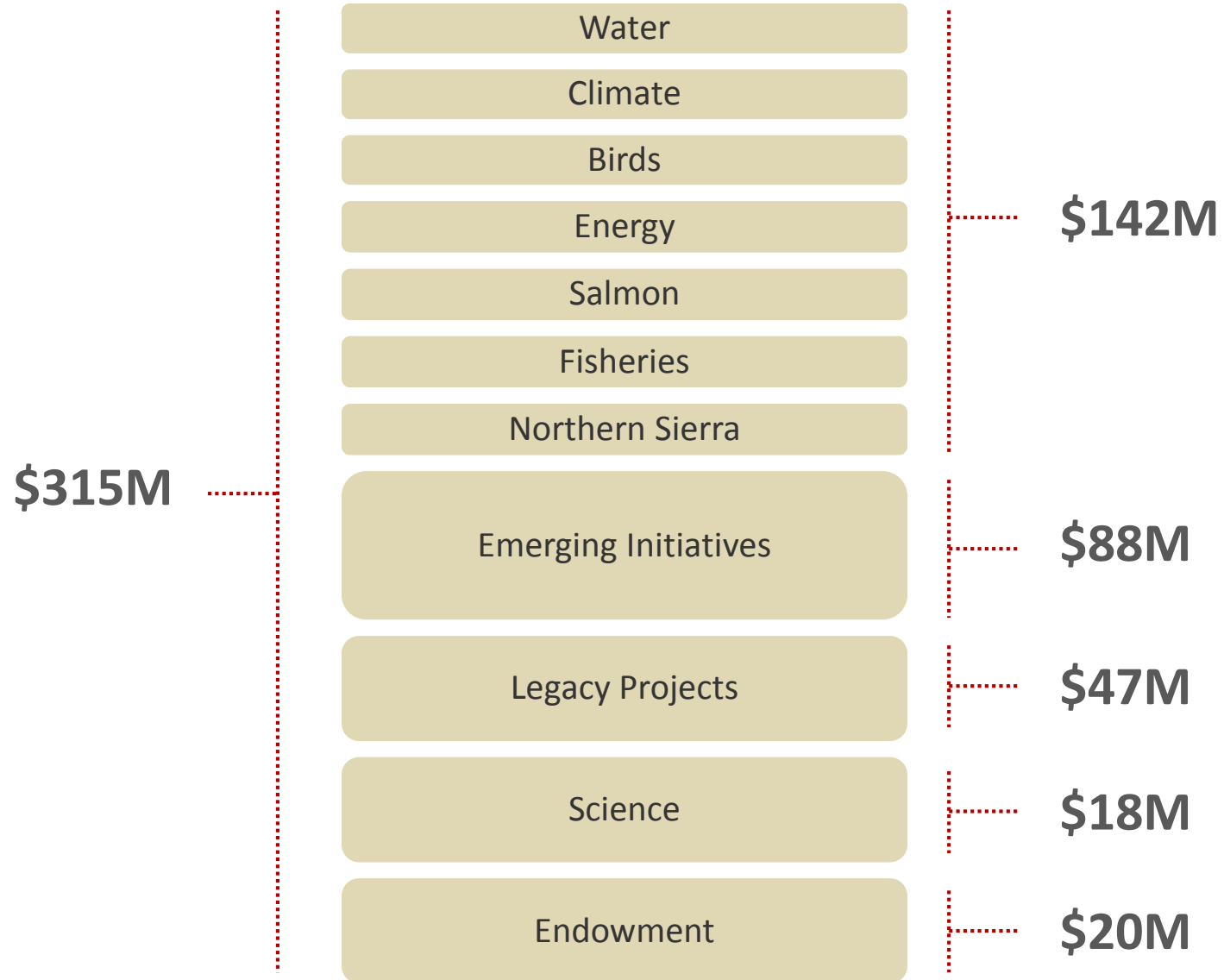
the Development Assessment...
where we started...



Overarching Recommendations

- › Launch a campaign
- › Provide Professional Growth Path for Staff
- › Screen Data
- › Rebalance Portfolios
- › Engage Volunteers

Campaign Preparation

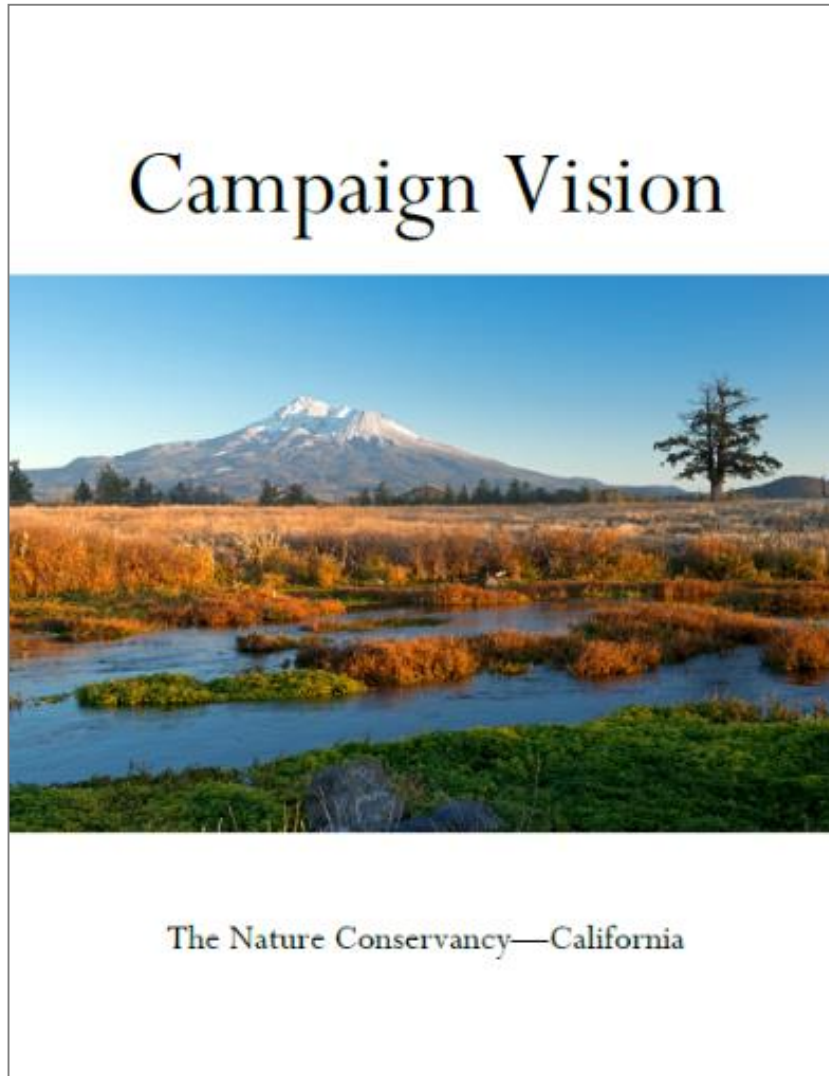


TNC-CA Five-Year Needs Assessment



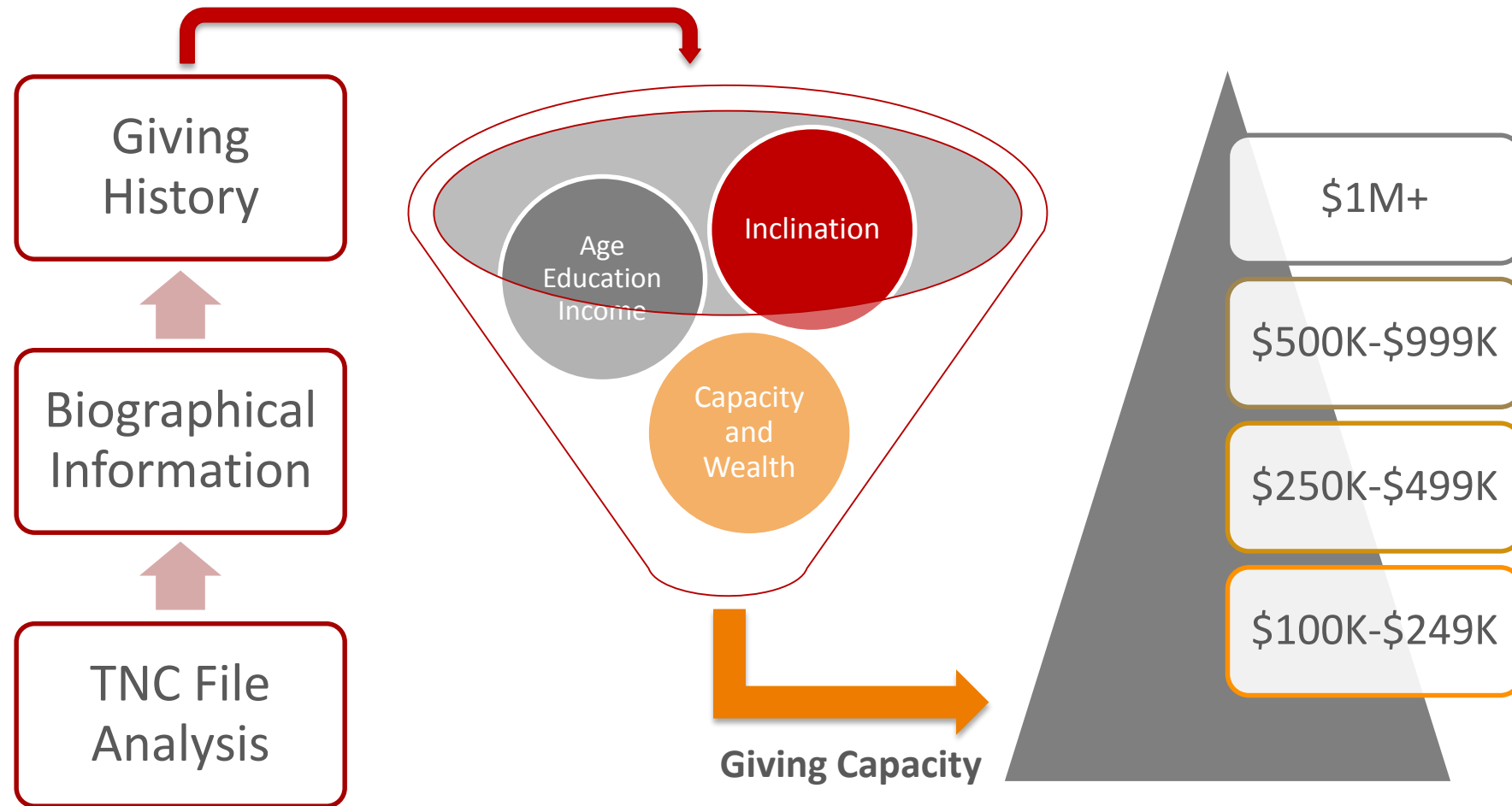
The Bucketing Exercise

Donor Engagement

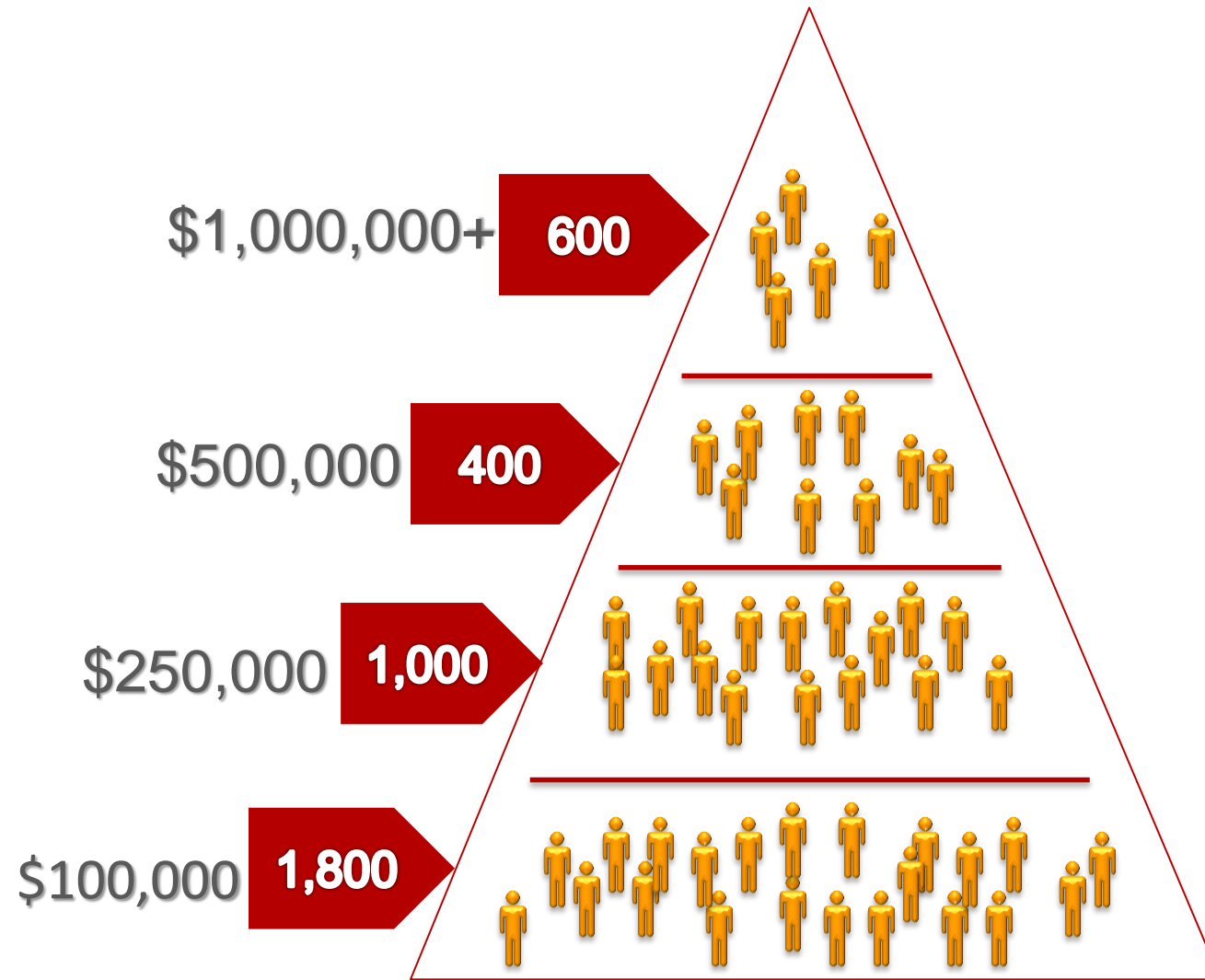


- 60 Phone Interviews
- 50 1:1 interviews
 - 25 conducted by C&C
 - 25 conducted by TNC
- Email Survey (800 responses)

625,000 Donors Records Reviewed

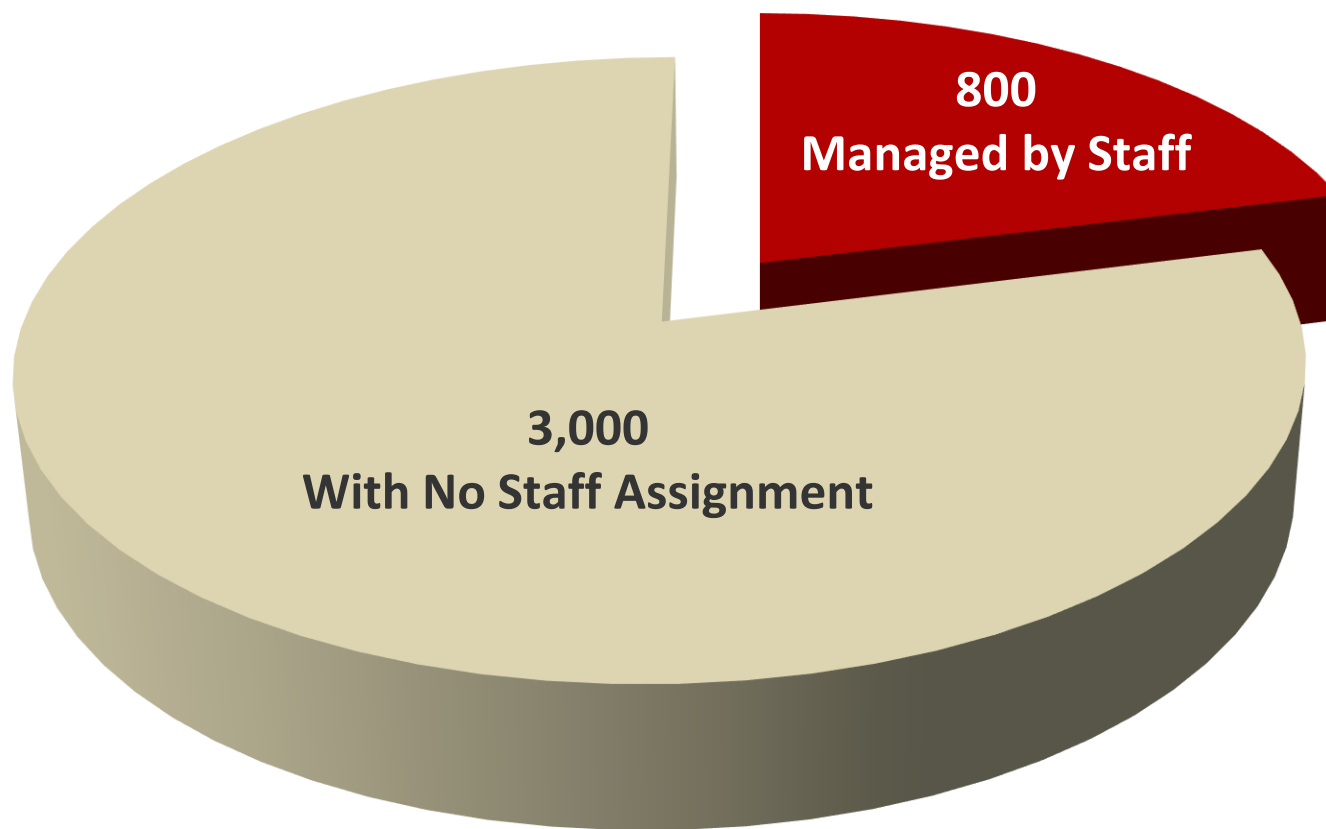


3,800 Prospective Donors (\$100K+)



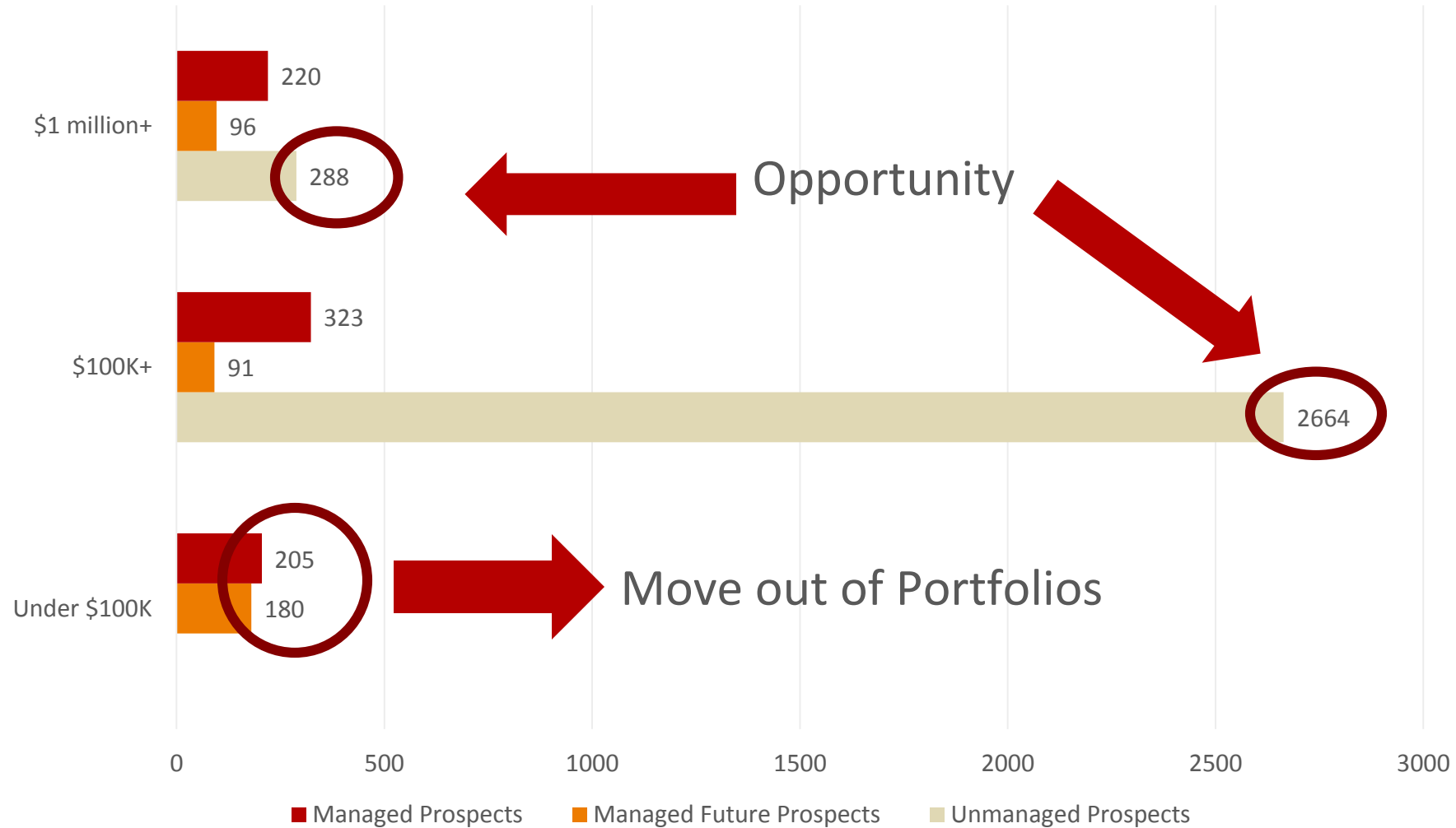
Gap Analysis

GIFT LEVEL	PROSPECTS		
	Needed	Identified	Δ
\$25,000,000	4	82	78
10,000,000	12	69	57
5,000,000	30	60	30
1,000,000	150	386	236
500,000	150	389	239
250,000	225	969	744
100,000	300	1,841	1,541
<100K	Many	17,925	
TOTAL	871+	21,721	

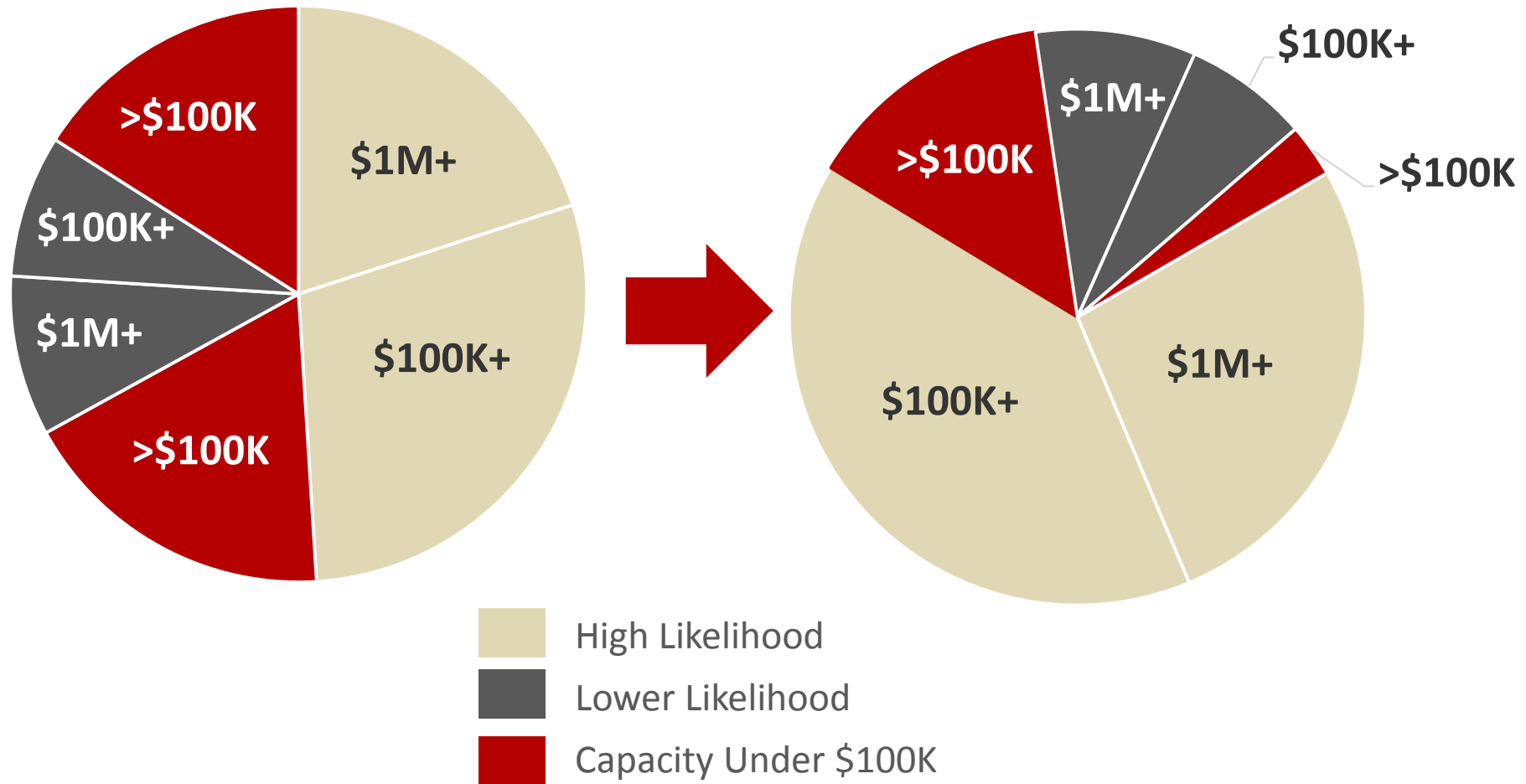


**\$100k+ donors
assigned to staff**

Rebalance Portfolios

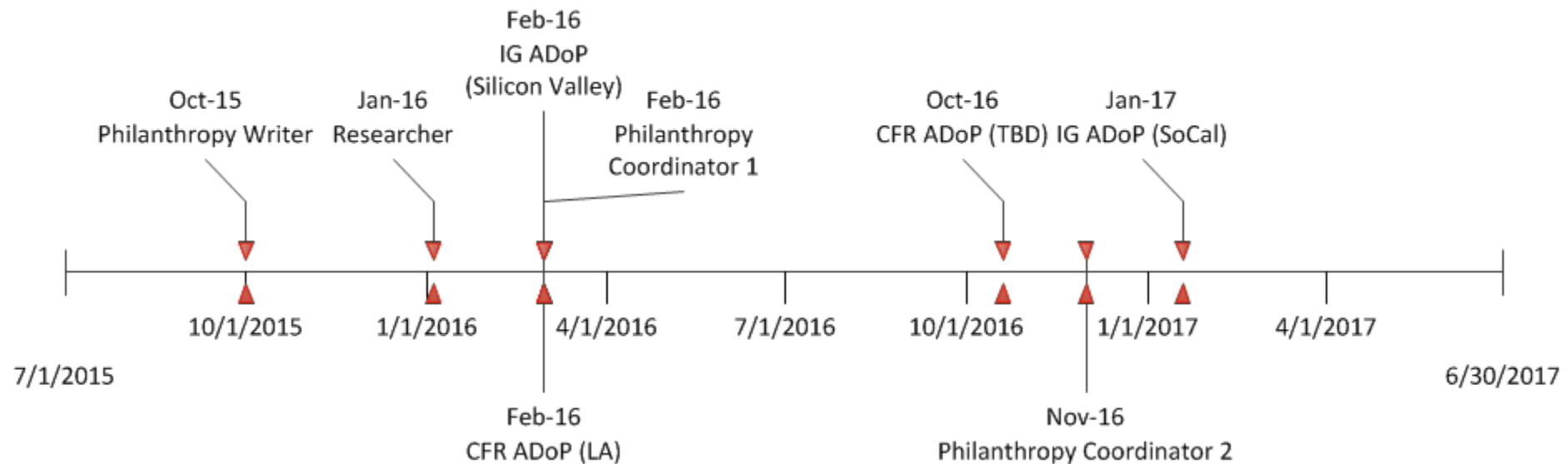


Summer 2013 – Winter 2014



Staffing Implementation

FY16: 5 New Staff FY17: 3 New Staff
Cost: \$3,100,000



Board Resolution

The Campaign Planning Committee of The Nature Conservancy, California accepts, in concept, the recommendations of Campbell & Company's campaign operating plan and recommends to the Board of Trustees that the Conservancy move forward with plans to prepare for and implement a campaign with a working goal of \$275 million.

The OurWorld Campaign is the most ambitious conservation campaign in history. Your support will help us solve the key environmental challenges of our time. Our goal is to raise \$275 million from California and \$5 billion worldwide, across four priorities:

LAND, WATER, OCEANS, INNOVATION

- THE NATURE CONSERVANCY IN CALIFORNIA -

LAND

Nature is good at adapting. But climate change, population growth and rapid infrastructure development are changing the landscape so much faster than nature can adapt. The landscape is becoming so much more difficult. We need to be fortifying the state's network of conservation lands to well-managed system—linking protected lands to well-managed lands from the coast to the mountains and the desert.

GOAL \$80 MILLION LAND STRATEGIES:

NETWORK NATURE

INSPIRE AN URBAN GENERATION

LAND / THE NATURE CONSERVANCY IN CALIFORNIA

The OurWorld Campaign is the most ambitious conservation campaign in history. Your support will help us solve the key environmental challenges of our time. Our goal is to raise \$275 million from California and \$5 billion worldwide, across four priorities:

LAND, WATER, OCEANS, INNOVATION

- THE NATURE CONSERVANCY IN CALIFORNIA -

WATER

As we experienced at the height of the drought, water is broken—and one rainy winter won't change that. We are recharging our water supply with underground reservoirs. And we are designing so people and nature get water when and where it's needed. Unexpected alliances and delivering science-based solutions will redefine the way we use this scarce resource.

GOAL \$100 MILLION WATER STRATEGIES:

PROTECT THE SOURCE

REBUILD NATURE'S RESERVOIRS

ENABLE PRECISION CONSERVATION

WATER / THE NATURE CONSERVANCY IN CALIFORNIA

The OurWorld Campaign is the most ambitious conservation campaign in history. Your support will help us solve the key environmental challenges of our time. Our goal is to raise \$275 million from California and \$5 billion worldwide, across four priorities:

LAND, WATER, OCEANS, INNOVATION

- THE NATURE CONSERVANCY IN CALIFORNIA -

OCEANS

Our oceans are in trouble. Fisheries are collapsing, sea level rise is threatening coastal habitat and coastal communities. The good news is that coastal communities are also in the best position to drive change. So we are working with coastal communities with the tools and technology they need to restore ocean health.

GOAL \$50 MILLION OCEANS STRATEGIES:

DRIVE A SEA CHANGE

SHORE UP OUR COASTS

OCEANS / THE NATURE CONSERVANCY IN CALIFORNIA

OUR WORLD Campaign

The OurWorld Campaign is the most ambitious conservation campaign in history. Your support will help us solve the key environmental challenges of our time. Our goal is to raise \$275 million from California and \$5 billion worldwide, across four priorities:

LAND, WATER, OCEANS, INNOVATION

- THE NATURE CONSERVANCY IN CALIFORNIA -

INNOVATION

We cannot let our success hinge on people valuing the environment above all else. We need to find ways to make conservation align with the things society already values. We must demonstrate that protecting nature for nature's sake also solves problems for people. And that's where innovation comes in. Science and technology are essential for catalyzing creative conservation solutions and rising to the challenge of protecting biodiversity in a human-dominated world.

GOAL \$45 MILLION INNOVATION STRATEGIES:

CHART THE COURSE FOR CONSERVATION

UNLEASH NEW TECHNOLOGIES

INNOVATION / THE NATURE CONSERVANCY IN CALIFORNIA

THE CAMPAIGN FOR OUR WORLD

**WE BELIEVE IN A FUTURE
WHERE PEOPLE AND
NATURE THRIVE TOGETHER**



**TRANSFORM AT LEAST 90
PERCENT OF CALIFORNIA'S
FISHERIES**

**PILOT CONSERVANCY
APPROACHES TO
SUSTAINABLE FISHERIES
IN AT LEAST FIVE COUNTRIES**



**PUT MIGRATORY BIRD
POPULATIONS ON A PATH TO
RECOVERY BY CREATING 1
MILLION ACRES OF
WETLAND HABITAT**



California Goal
\$275 MILLION FOR LOCAL-TO-GLOBAL CONSERVATION

OCEANS

GOAL \$50 MILLION

Transform the way our fisheries and coastal environments are managed

WATER

GOAL \$100 MILLION

Ensure healthy water supplies for nature and people

LAND

GOAL \$80 MILLION

Protect and restore a resilient network of conservation lands across California

INNOVATION

GOAL \$45 MILLION

Deliver science and technology breakthroughs to propel conservation innovation

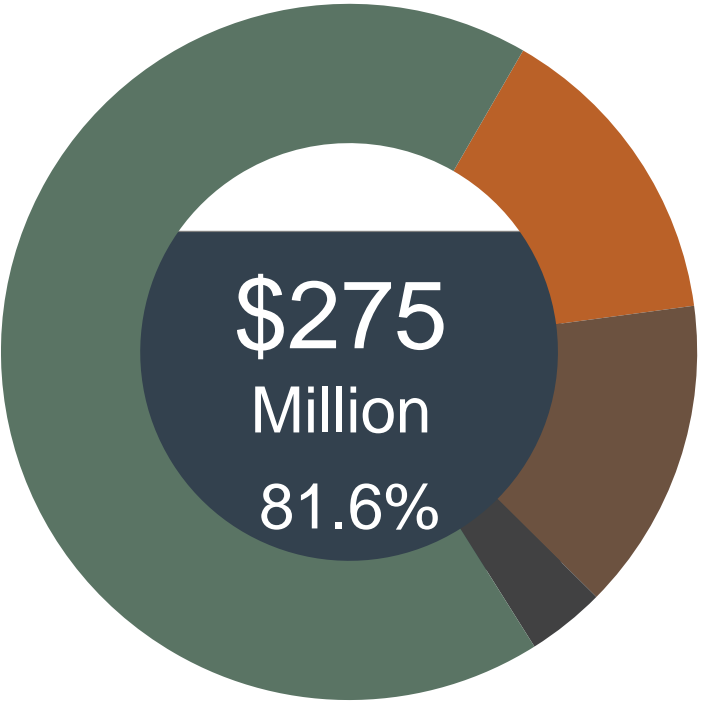
**THE WORLD WE DEPEND ON
DEPENDS ON US**



Where We Are Now

CALIFORNIA CAMPAIGN
FUNDRAISING DASHBOARD

7/1/13 – 1/31/16

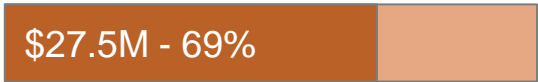


GOAL BY SOURCE

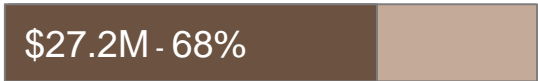
**CALIFORNIA
PHILANTHROPY**
\$185 MILLION



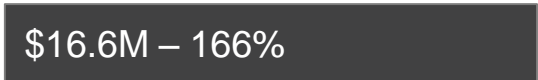
CA MEMBERSHIP
\$40 MILLION



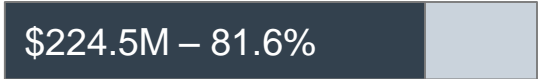
**CA REALIZED
BEQUESTS**
\$40 MILLION



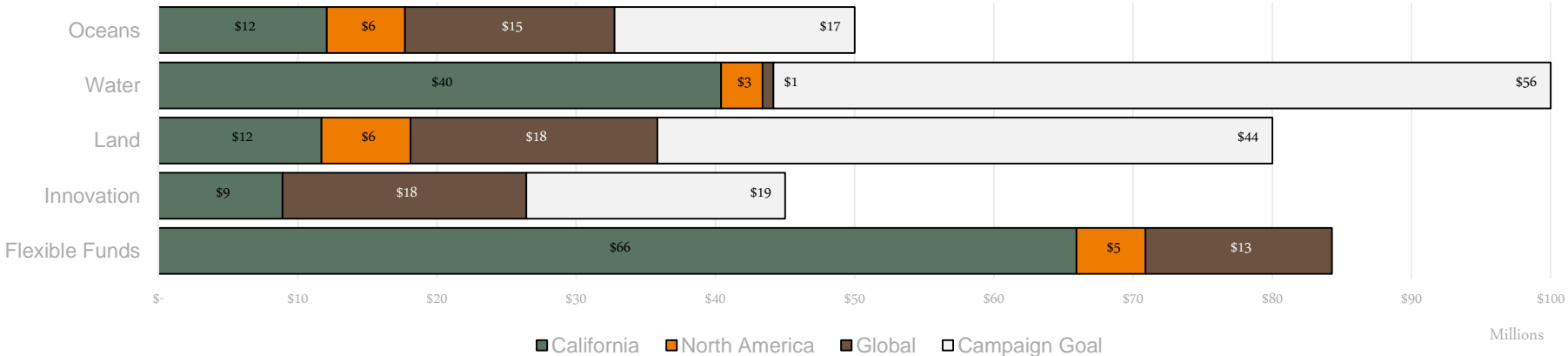
**OUT OF STATE
TO CA**
\$10 MILLION

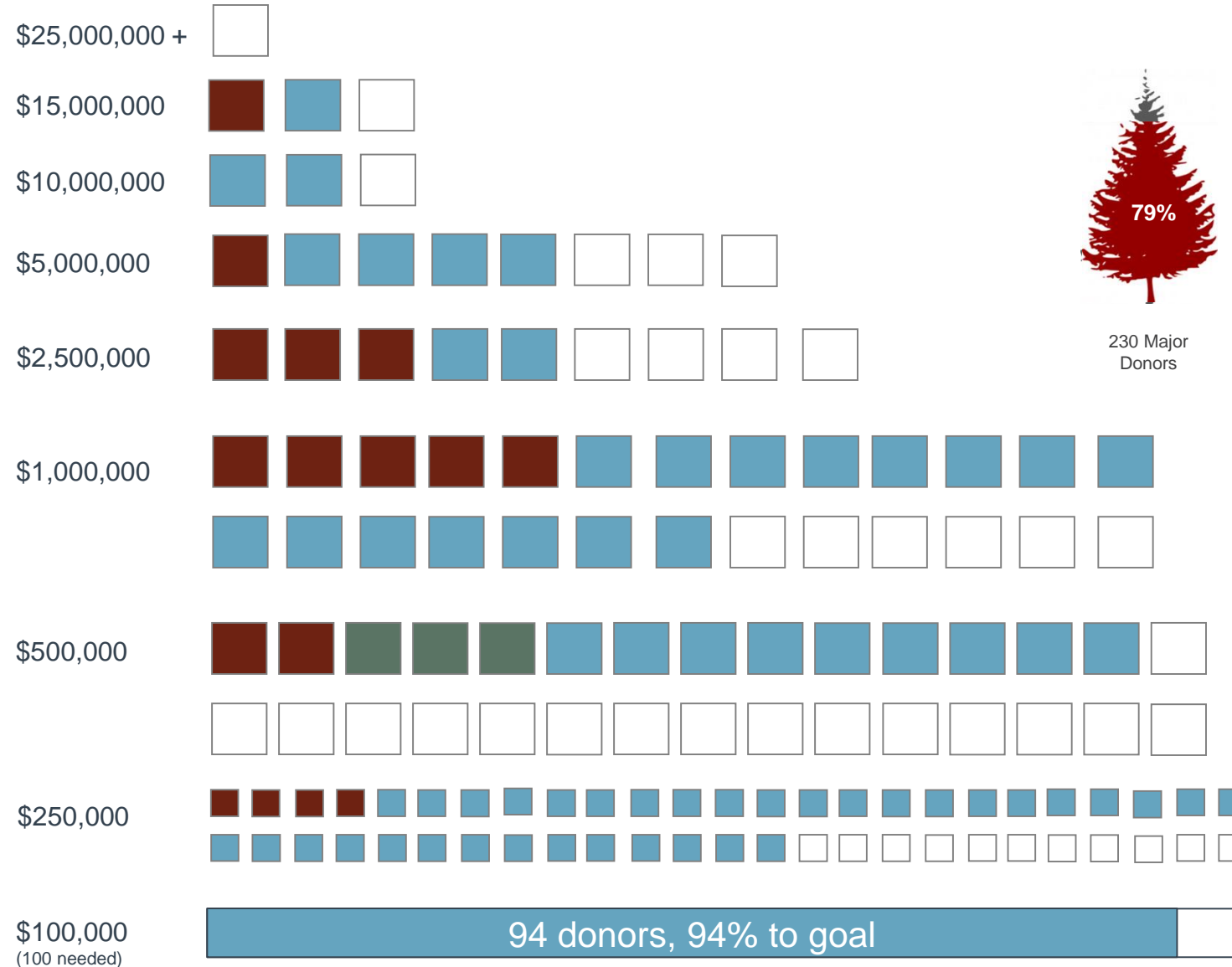


TOTAL
\$275 MILLION



GOAL BY USE





Trustee Gifts

Leadership Council Gifts










Other Gifts

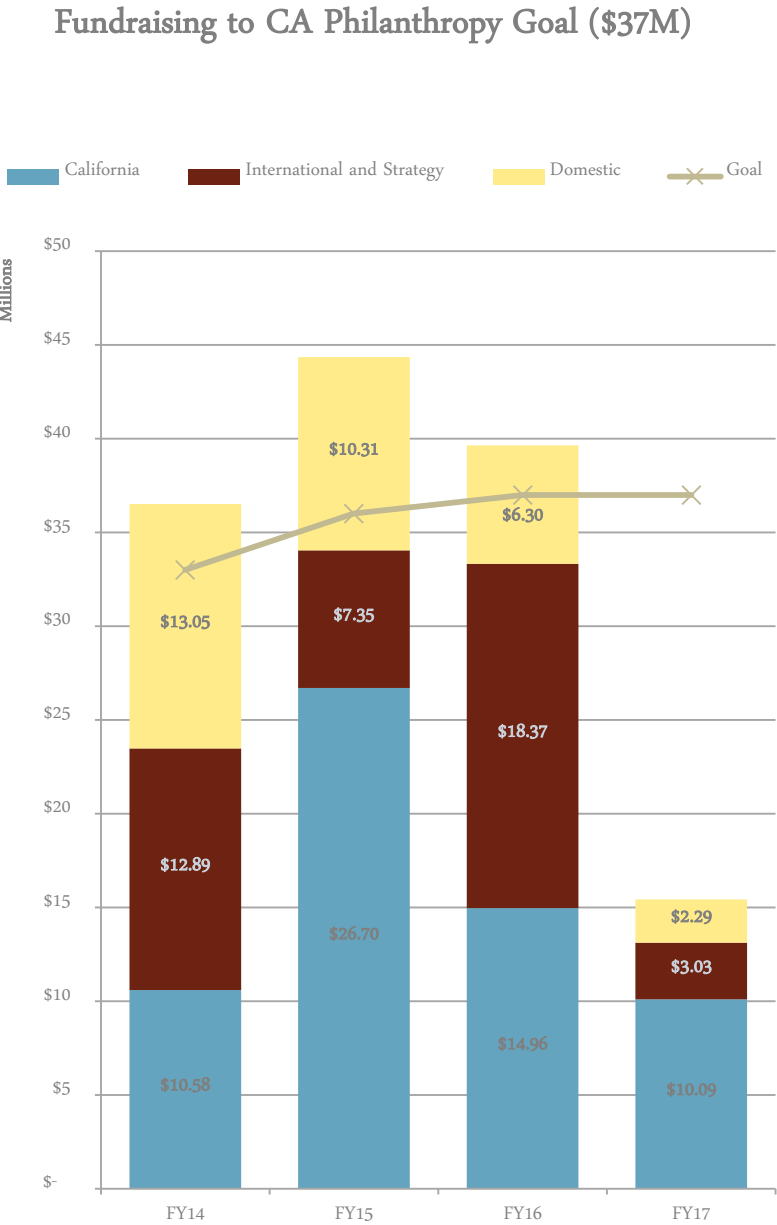
Gifts Needed

TOTAL TRUSTEE GIVING:
\$45,587,267

TOTAL CLC GIVING:
\$3,772,239

Internal

Metric	Total as of 1/31 (58% of FY17)		
Portfolio Size	7/13 portfolios within metric range	54%	
Personal Visits (Through January)	900/1257	72%	
Impact Investing Discussions (CFR)	1/6	17%	
New Bequest Commitments (IG)	33/73	45%	
New \$50K+ Prospects Added to Portfolio	30/149	20%	
Prospect Disqualification	231/149	155%	
Personal Solicitations or Written Proposals of \$50K+	67/110	61%	
New Major Gifts of \$100K+ annual	25/67	37%	
\$ raised annual (ADoPs only, including non-measures fundraising)	\$21.5/\$41M (Measures FR: \$14.7M)	52%	



Challenges Ahead

- › Securing next wave of major gifts
- › Volunteer engagement

QUESTIONS?



Additional Questions? Contact Us



Jake DeMoe

(415) 281-0470

jdemoe@tnc.org



Craig Hightower

(949) 376-2920

cwh@campbellcompany.com