



5 YEAR FUNDRAISING PLAN

2008-2013

LAST UPDATED JANUARY 20, 2009

FUNDRAISING PLAN SUMMARY

Fundraising Plan Goal

From the four goal areas in the Strategic Plan, more specific strategies and tasks have been developed. The overarching goal of this Plan is to develop a stable and growing base of financial support that will cover operational costs on an annual basis, while also addressing mechanisms for funding project related costs.

Plan Timeframe

This Fundraising Plan covers the next five fiscal years: July 2008 through June 2013.

Funding Needs

Sagebrush Steppe Regional Land Trust requires sufficient funds to support the following activities on an ongoing basis including administration and general operations, fundraising, capacity building, communications & outreach, transaction and project implementation costs, non-project specific stewardship, and acquisitions.

Fundraising Categories

Sagebrush Steppe Regional Land Trust will develop a diverse fundraising program that depends on revenue from several budgeted fundraising categories including annual giving, major donors, corporate sponsorships, grants, events, capital campaigns, funding agreements, events and interest/dividends, planned giving, and Board designated reserve funds.

Fundraising Objectives

Sagebrush Steppe Regional Land Trust has defined five outcomes that will be accomplished through the implementation of this Fundraising Plan including diversification of revenue sources that minimize reliance on any single source of revenue, stabilization of income from a diversity of funding sources, increase unrestricted revenues, develop capacity to generate revenue in perpetuity, and increase community support.

Fundraising Strategies

Sagebrush Steppe Regional Land Trust will implement fundraising strategies including investing in resources that improve the Trust's fundraising capacity, improving the Trust's fundraising procedures, securing the Board of Directors' commitment to participate in major donor efforts, implementing a "corporate sponsor" program, cultivating broad, long-term relationships between donors and the Trust, maximizing cost per dollar raised ratio, sustaining and enhancing fundraising strategies that are proven and/or predictable, implementing a strategy to achieve land acquisition goals, identifying and explore "entrepreneurial" opportunities, and implement good ideas, and increasing the name recognition and public awareness of the Trust and its mission.

Short-Term Goals

As a developing organization, SSRLT faces significant fundraising challenges. To maintain current operations and staff Land Trust is setting the following priorities for 2008-1010;

- research and submit high quality grant applications throughout each year for unrestricted operational funds and as needed to fund specific conservation projects
- develop and cultivate major donors
- develop and cultivate corporate sponsors
- develop and cultivate annual membership giving
- improve board fundraising capacity through board development

OVERVIEW OF THE FUNDRAISING PLAN

Background

Sagebrush Steppe Regional Land Trust was incorporated in 2004. Our mission is to protect and enhance natural and working lands, now and for future generations, in Southeastern Idaho. SSRLT works in the seven southeastern counties of Idaho: Bannock, Bear Lake, Bingham, Caribou, Franklin, Oneida and Power. We are governed by a Board of Directors, and with the support of HOTR, hired our first full time Executive Director in June 2008. Our organization's goals include permanently protecting critical habitat and open space, becoming a leader in land conservation across our service area, creating an efficient and effective organization capable of protecting and managing lands, and developing a stable and growing base of financial support. Since its inception, the SSRLT has secured legal counsel, wrote its articles of incorporation received 501(c)(3) status, established numerous partnerships with land management agencies and stakeholder groups, and protected almost 900 acres in southeastern Idaho. We are a member of the Land Trust Alliance (LTA) and have adopted the LTA Standards and Practices.

In 2006, the SSRLT signed a Memorandum of Agreement (MOA) with PacifiCorp, the Federal Energy Regulatory Commission licensee for the Bear River Hydroelectric Project. Through this agreement, the SSRLT has partnered with PacifiCorp through 2033 to acquire and manage properties in perpetuity in the Bear River drainage for the benefit of fish and wildlife resources. As part of the FERC license, PacifiCorp agreed to provide funds for a period of 30 years for the acquisition of land and water rights, and will facilitate the transfer of a willing seller's interest in such land to a land trust. In 2006, we purchased our first piece of land through the MOA, the Kackley Preserve, a 157-acre parcel of land adjacent to the Bear River with two freshwater springs flowing into the Bear River.

During 2007, SSRLT increased its protected acreage from 189 to 897 acres. Of these 897 acres, we have 161 acres in fee title purchases along the Bear River and the remaining 736 acres are easements located in Caribou, Franklin and Bingham Counties. Property stewardship includes management of fee title properties and annual monitoring of conservation easements. Until June 2008, SSRLT relied on Board Members, volunteers and consultants to complete stewardship activities. With the addition of full-time Executive Director, we will continue to utilize donated and volunteer services where possible, but ultimate responsibility has been delegated to the Executive Director to ensure activities are accurate and complete. Our organization's development is critical to the Land Trust's success and our future plans include; increasing our membership and funding base, continuing our land protection projects, and becoming a leader in land conservation in southeastern Idaho.

Strategic Direction for Sagebrush Steppe Regional Land Trust

Sagebrush Steppe Regional Land Trust's programs follow four primary goal areas of the Strategic Plan:

- 1. LAND CONSERVATION - Permanently preserve the most important open space and agricultural lands that are unlikely to be protected by others.**
 - A. Identify and prioritize the most critical land parcels in the region for protection by Sagebrush Steppe Regional Land Trust.
 - B. Increase the geographical diversity of projects across our service area.
 - C. Systematically evaluate options for protecting these critical lands and take actions to achieve protection according to assigned priorities and funding opportunities.
 - D. Respond to opportunities presented by land owners and conservation partners that may lead to protection of high value conservation properties and irreplaceable working lands.
 - E. Ensure that the conservation values of lands protected by Sagebrush Steppe Regional Land Trust are maintained permanently.

- 2. FINANCIAL SECURITY - Develop a stable and growing base of financial support**
 - A. Increase membership and annual giving to include individuals, businesses, organizations, and governmental agencies.
 - B. Seek grants to support programs and special initiatives.
 - C. Build endowment funds to support conservation, stewardship and operations.
 - D. Develop and implement diverse fundraising strategies (to supplement membership, grants and endowments).
 - E. Cultivate relationships with local, regional, and federal governmental agencies
 - F. Secure appropriate endowments to meet our stewardship obligations in perpetuity.

- 3. ORGANIZATIONAL CAPACITY - Create an efficient and effective organization capable of protecting and managing lands in perpetuity.**
 - A. Develop a strong and diverse Board of Directors.
 - B. Develop the organization's infrastructure, including a strong network of committees and advisors
 - C. Increase volunteer support as needed to manage programs effectively.
 - D. Provide the resources and development opportunities to ensure an effective, professional staff.
 - E. Prepare for accreditation through the Land Trust Alliance (LTA).

- 4. LEADERSHIP - Develop a leadership role in Southeastern Idaho land conservation.**
 - A. Increase community awareness of Sagebrush Steppe Regional Land Trust and emphasize the benefits of private non-government land conservation.

- B. Develop alliances that enhance our capacity, effectiveness, and community support.
- C. Successfully complete at least one high-profile land preservation project.
- D. Establish Sagebrush Steppe Regional Land Trust as a reliable resource for land conservation information.

Fundraising Plan Goal

From the four goal areas in the Strategic Plan, more specific strategies and tasks have been developed. The purpose of this Fundraising Plan is to define the objectives, methods, and specific tasks related to the fourth strategic goal above. Specifically, the goal of this Plan is to develop a stable and growing base of financial support that will cover annual operational expenses, transaction project costs, and endowments through fiscal year 2008-2013.

Plan Timeframe

This Fundraising Plan covers the next five fiscal years: July 2008 through June 2013. *At the end of year two, SSRLT Board and Staff will update the Fundraising Plan. By 2010 SSRLT needs to access the funding mechanisms and viability of maintaining full-time ED (existing grant funding first two years runs out)

Funding Needs

Sagebrush Steppe Regional Land Trust requires sufficient funds to support the following activities on an ongoing basis.

Administration & General Operations – These are the costs to run the organization.

Fundraising – This includes the direct costs of raising money to support all facets of the Trust’s budget, including some communication that supports Trust “friend-raising” efforts. The primary fundraising expense is staff time.

Capacity Building – This is a broad category of various activities such as strategic planning, staff and Board training, committee work, and meetings with partner organizations aimed at the long-term growth and development of the Trust.

Communications & Outreach – These are the costs to get the Trust’s message out to landowners, partners, supporters, and the general public.

Transaction & Project Implementation Costs – These includes the non-acquisition costs of acquiring land through ownership or easement, primarily staff time and consultant fees that are not associated with the PacifiCorp MOA. (Acquisition costs will be developed on a project-by-project basis.)

Non-Project Specific Stewardship – This includes only the non-project specific costs of land stewardship, primarily maintaining the Trust’s stewardship capacity and purchasing materials. (Specific project stewardship costs will be developed on a project-by-project basis.)

Acquisitions (non-PacifiCorp MOA projects) – These are the project-specific costs of preserving land, primarily the costs of purchasing land and easements and completing transactions. Acquisition costs are not included in the Trust’s operational budget, nor are they included in the fundraising budget within this Plan. Acquisition costs are developed on a project-by-project basis.

Description of Fundraising Categories

Sagebrush Steppe Regional Land Trust will develop a diverse fundraising program that depends on revenue from several budgeted fundraising categories, defined as follows:

Annual Giving (aka “Membership”). A member is an individual or organization that donates money to the Trust on an annual basis (with their most recent gift given within 30 months). Annual giving is generally unrestricted revenue.

Major Donors. Major donors contribute at least one gift of \$500 or more to the Trust on an annual basis. Major donations are generally unrestricted revenue.

Corporate Sponsorships. Corporate sponsors are businesses or organizations that contribute to the Trust. Corporate sponsorships are unrestricted revenue (although a small portion may be directed to a restricted purpose if requested).

Grants. Grants are a one-time donation of \$1,000 or more for a specific purpose, even if that purpose is simply “general operations”. Grants are almost always restricted revenue, although in some circumstances a portion of the grant may be used for general operations/admin. (Grants for acquisition expenses are not part of this Plan.)

Events. Events include any activity planned by the Land Trust that invites community members, donors, and partners. Some events are explicitly designed for fundraising. Other events may not be explicitly for fundraising, but for “friend-raising.” These could include a hike at a Land Trust property or a reception. Revenue from fundraising events is unrestricted; however, the revenue is first to be applied to the costs of the event before net (“profit”) is ascribed elsewhere to the organization.

Capital Campaigns. Capital campaigns are specified fundraising initiatives over a long time span, designed to raise significant funds for a specific purpose or project. Capital campaign revenue is usually restricted, but could be a mix of restricted and unrestricted revenue.

Funding Agreements. Funding agreements include Memorandums of Understanding or Agreement (MOU/MOA) and multi-party legal agreements that set up a mechanism and/or process for funding to be contributed to the Trust over a period of time. For example, the Trust has an existing funding agreement with PacifiCorp Energy. Revenue from funding agreements may be unrestricted or restricted as specified in the agreement.

Interest/Dividends. According to its Investment Policy (currently being developed), Sagebrush Steppe Regional Land Trust invests revenues from various sources into several accounts and funds to generate short-term and long-term interest and dividend revenue. The Trust’s investments include unrestricted and restricted funds (of which the interest/dividends may be unrestricted or restricted) that are all tracked separately.

Other. The “catch all” or miscellaneous category that includes: cash donations that do not fit into one of the above categories (general donations, memorial contributions, etc); non-cash donations; donations of assets from like-minded organizations; lease revenue; fee for service revenue; item sales; proceeds from non-event raffles and auctions; and other entrepreneurial fundraising strategies.

Sagebrush Steppe Regional Land Trust may also realize income from other sources, including the two listed below. Because this income cannot be predicted and should not be budgeted, no revenue from these two sources are projected.

Planned Giving. Revenue received from bequests, trusts, or other planned giving methods will likely have restrictions placed on them by the donor. Unrestricted bequests may be designated by the Board for endowment or reserve purposes, or left in the general operating fund, as needed.

Reserves (aka “Carry-over”). Any unrestricted revenue in excess of actual expenses will be placed in a reserve account at the end of the fiscal year, to be used to supplement the coming fiscal year’s budget and/or further build the Trust’s capacity over time.

Anticipated Annual Operational Budget

The primary goal of this Plan is to implement fundraising activities to generate sufficient revenue to cover the Trust’s anticipated costs on an annual basis. Very generally, this amount (based on costs anticipated for 2009-10) is \$75,000.

ED Salary, Health Care, Employment Taxes, and Bonuses	\$50,000
Accounting	\$3,000
General Legal Fees	\$5,000
General Office (phone, internet, supplies, utilities, maintenance)*	\$2,000
General Community Outreach	\$1000
Post Office Box and Postage	\$250
Annual Membership Mail Campaign	\$250
Dues and Subscriptions	\$500
Newsletter (2 times/year)	\$1000
Stewardship Monitoring	\$1000
Training	\$2000
Travel	\$5000
Miscellaneous	\$4000

* assumes temporary home office and part-time use of IDFG (may change if IDFG has full office for LT after new construction completed)

FUNDRAISING OBJECTIVES

In order to develop a stable and growing base of financial support to cover its expenses, Sagebrush Steppe Regional Land Trust has defined five outcomes that will be accomplished through the implementation of this Fundraising Plan. Realizing these outcomes will create an efficient and effective organization capable of protecting and managing lands in perpetuity.

Diversification of revenue sources to minimize reliance on any single source of revenue. Diversification of revenue sources is primarily important for operational revenue. The Land Trust would like to see more geographic diversity (beyond its core support area of Pocatello) and demographic diversity of its supporters.

Stabilize funding from diverse sources. Stability is vital to ensure the Trust can plan and execute its programs for perpetuity. In addition, retaining the commitment of current (and future) supporters is significantly more effective and efficient than having to build new relationships each year.

Increase unrestricted revenues. Unrestricted revenue is essential for program flexibility and to respond to emerging conservation opportunities and threats. The Trust must increase the percentage of unrestricted revenue, from all fundraising sources.

Develop capacity to generate revenue in perpetuity. To support the protection of land in perpetuity, the Trust must build endowments and reserves that continually generate revenue for stewardship for each land protection project and for other operational commitments.

Increase community supporters. Increasing member individuals and organizations increases our access to potential fundraising opportunities, and increases our credibility of the organization. The Trust's goal is to increase its number of "members" to 200 by the year 2010 and reach 500 members by 2013.

Acquisition expenses are not included in this Plan because they are typically raised through restricted project-specific grants, and because the Trust's operational budget is largely independent and unaffected by the amount of acquisitions. That is, no matter how many projects the Trust is completing in a given year, the funding needed for salaries, overhead, operations, communication, etc., remains fairly constant. However, this Plan does indirectly support acquisitions, because the Plan provides the stable base of operational support to pursue acquisition projects and support transaction costs and other related expenses.

FUNDRAISING STRATEGIES

In order to meet the goal and objectives of this Fundraising Plan, the land Trust will implement fundraising strategies. Foremost among these – and most important to the Trust’s current situation – the Trust has adopted the following specific fundraising strategies to support this Plan.

Immediately invest in resources that improve the Trust’s fundraising capacity.

The Trust must immediately increase its fundraising capacity to compensate for the downturn in the economy, and continuing increase in costs. Primarily, this investment must be in the form of fundraising staff resources (salaried staff and/or contract assistance), although the Trust should also invest in the development of its Board, volunteers, and existing staff. The Trust must also improve upon and maintain its fundraising systems, namely its branded materials, fundraising software, online giving program, and agreements with partner organizations.

Update the Trust’s fundraising procedures.

Hand-in-hand with increased fundraising capacity, the Trust’s fundraising procedures need to be updated. The role of the Fundraising Committee, the Board of Directors, individual Board members and other volunteers, and Trust staff needs to be clarified and updated to increase efficiency and effectiveness.

Secure the Board of Directors’ commitment to participate in major donor efforts.

The Trust’s major donor program will rely on selected members of the Board of Directors, with support from the Executive Director. Board members with connections to individuals and the business community are critical to the success of the major donor program. The Trust must immediately identify willing Board members, secure their commitment, and set up a schedule to solicit major donors. Potential new additions to the Board of Directors should be evaluated with an eye to the Board’s fundraising effectiveness. Staff must provide the branded materials and assist with coordination of major donor solicitation.

Implement a “corporate sponsor” program.

Selected members of the Board of Directors, with support from the Executive Director, will solicit corporations to become corporate sponsors of Sagebrush Steppe Regional Land Trust by donating annually. Staff must provide the branded materials, presentation equipment/materials, and assist with coordination of corporate sponsor solicitation.

Cultivate broad, long-term relationships between donors and the Trust.

The Trust must focus on developing and cultivating relationships with donors that go beyond one person at the Trust and have the potential to become long-term relationships. The participation of all Board members and staff in fundraising efforts is critical in the overall process of creating organizational loyalty from our donors and an institutional connection to the community that will

outlive any one Board or staff person's tenure. Also, the Trust must develop and cultivate long-term relationships (resulting in multi-year giving) as the cornerstone of fundraising effectiveness. This requires greater investment up-front that reduces net revenue for some programs in the near term, but the long-term benefits should far outweigh near term costs. In some cases, the Trust has already established its credibility with certain donors and should "cash in" on that credibility by asking for longer-term support.

Maximize cost per dollar raised ratio.

Without jeopardizing any particular fundraising strategy or program, the Trust will prioritize fundraising strategies and programs that have a low cost per dollar raised ratio. For example, the Trust will put more effort into major donor solicitation (which costs the Trust \$0.18 to raise a dollar... based on Placer Land Trust estimates) than it will put into fundraising events (which costs the Trust \$0.45 to raise a dollar... based on Placer Land Trust estimates). The efficient use of fundraising time and resources in this manner will result in a greater return on the Trust's investment.

Sustain and enhance fundraising strategies that are proven and/or predictable.

The Trust will continue to sustain fundraising strategies that have proven to be effective, and will work to enhance these strategies as appropriate. For example, the Trust will sustain and improve its annual giving program (new and renewing "members") and will continue to host one or more fundraising events per year. Additionally, the Trust will continue to seek out grant funding for acquisition costs on a project-by-project basis.

Implement strategy to achieve land acquisition goals.

With the support of selected Board members and volunteers, the staff will implement a major capital campaign, with a goal to generate \$250,000.00 over several years (including unrestricted revenue) and raise the public profile of the Trust.

Identify and explore "entrepreneurial" opportunities, and implement good ideas.

The Trust has the potential to generate revenue from other sources – anything from generating surpluses on land transactions, to selling T-shirts. The Trust will look at various entrepreneurial opportunities and determine their potential and appropriateness as part of its activities, and pilot programs that it believes are likely to yield good results.

Increase the name recognition and public awareness of the Trust and its mission.

Nonprofit fundraising success depends in large part on potential donors knowing that the nonprofit exists, and having a favorable opinion of the nonprofit. Through word-of-mouth, written communications and publications, media, public outreach, and "branded" materials, the Trust must step up its efforts to brand itself as an organization and mission worthy of the support of potential funders.

SHORT-TERM GOALS

As a developing organization, SSRLT faces significant fundraising challenges. With the addition of a full-time staff member to its annual budget, the amount of operation funds has become a significant challenge. To address this, the Land Trust is setting the following priorities;

Research and Submit high quality grant applications throughout each year for unrestricted operational funds (for salaries and general operations including office, accounting, legal, and travel costs).

Research and submit high grant applications as needed to fund specific conservation projects.

Develop and cultivate major donors – set up meetings with ED and Board Member

Develop and cultivate corporate sponsors – set up meetings with ED and Board Member

Develop and cultivate annual membership giving – includes mail appeals

Improve Board Fundraising Capacity through Board Development (new members and training)

HOTR (June 2008 – July 2009) Fundraising Project Timeline

	Aug-08	Sep-08	Oct-08	Nov-08	Dec-08	Jan-09	Feb-09	Mar-09	Apr-09	May-09	Jun-09
Board development training											
ED Development Training											
Development of 5 year fundraising plan											
Board/Staff strategic planning retreat											
Website and online donation development											
Stakeholder outreach meetings											
Donor management software											
Targeted mail campaign											
Donor Cultivation											
Outreach display											
Obtain branded outreach materials											
Develop a collaborative fundraising strategy											

