



SHENANDOAH VALLEY
CONSERVANCY

CELEBRATING 35 YEARS

Inspiring Hope + Confidence in an Age of Uncertainty

Integrating Strategic Communications, Advancement + Finance for Conservation



Introduction

Presenter Introductions

- Peter Hujik | Executive Director, Shenandoah Valley Conservancy
- Katie Wallace | Founder + CEO, Wallace 360
- Tim Plant | Founder + CEO, Pachira Strategies
- Rob Mason | Managing Partner, R. Mason & Company

Participant Poll



Inspiring Hope + Confidence in an Age of Uncertainty

Introduction

Branding + Communications

Advancement Efforts

Financial Modeling

Closing Discussion



Background

- 01 Liberal Arts degree
Masters degree in plant ecology
 - 02 Landscape-scale conservation
Systems-level thinking
Evidence-based approach
 - 03 Nested conservation plans, work plans + goals
Non-profit management + organizational development
Multi-year approach to budgeting, fundraising + financial management
- > Landscape-scale conservation requires multi-year approach





Our Story

Adventure 01 – Ignite the Spark!

Streamlined committees

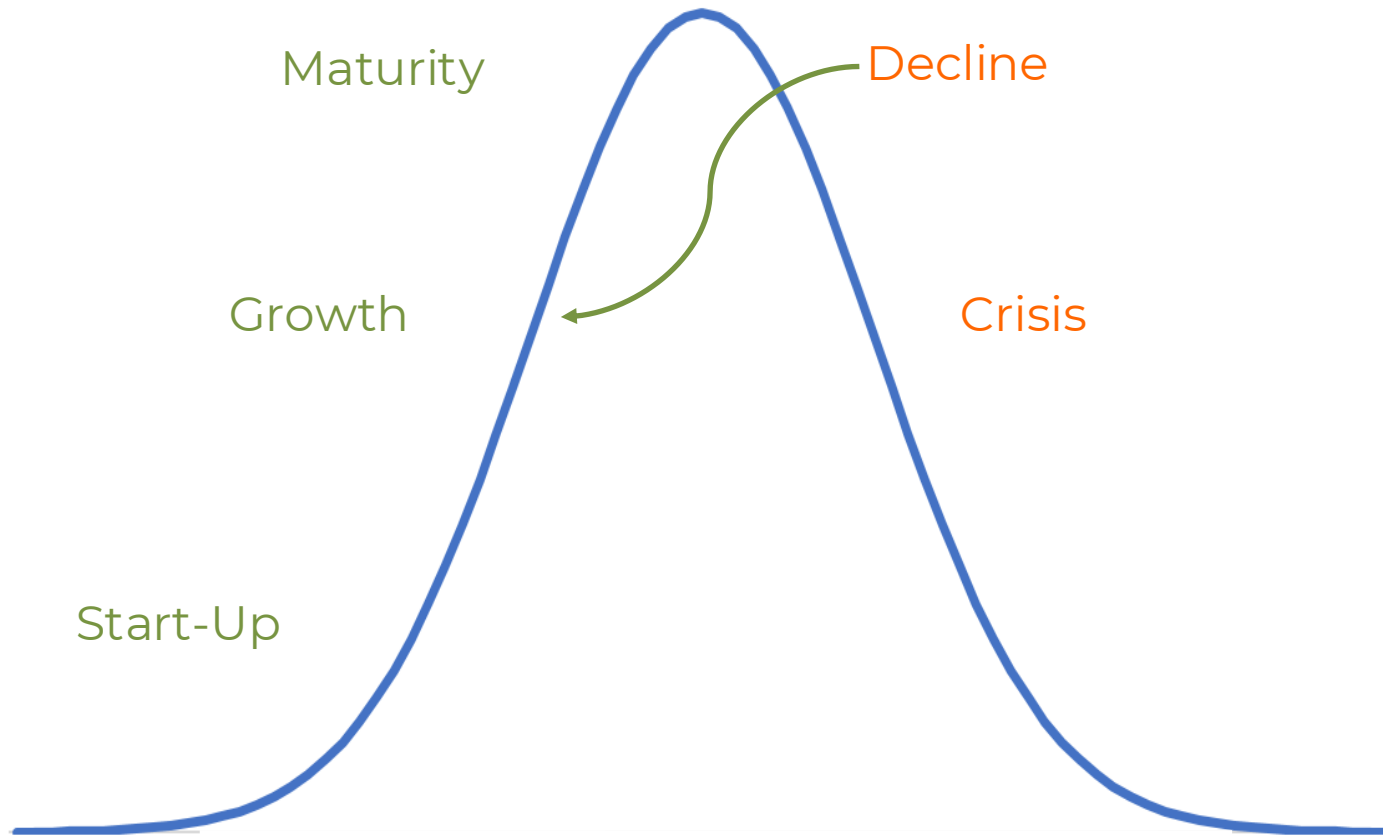
Overhauled + upgraded financial management

Updated branding + enhanced communications

Expanded level of community engagement



Organization Life Cycle

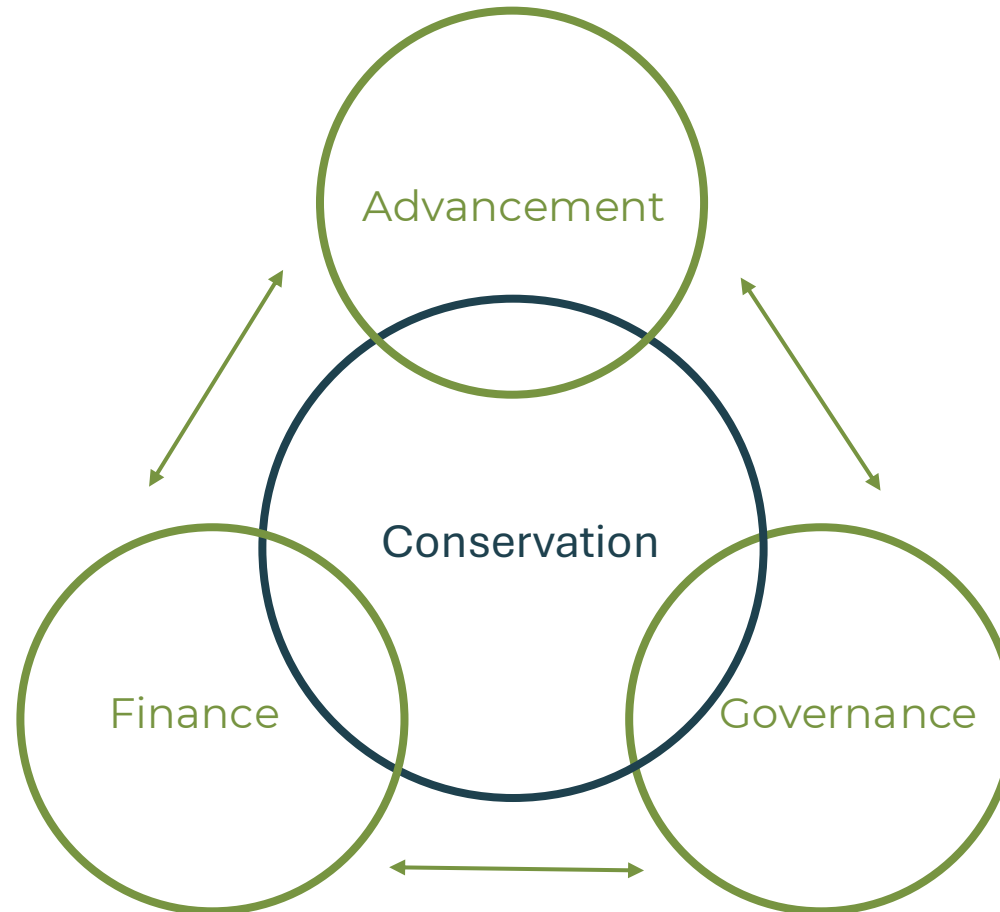


Susan Kenny Stevens





Organizational Development





Work Plan



BOARD WORK PLAN + CALENDAR

Assumptions for Fiscal Year 2025-26: January 1, 2026 – June 31, 2026

Over the past twelve months, the Conservancy has continued to make significant progress on all fronts—land protection, fundraising, and organizational development. During this time, we faced both significant challenges and opportunities including several unexpected large funding awards that resulted in increased capacity. In the first board meeting of the year, we adopted another ambitious work plan based on the Conservancy's newfound growth dynamic.

I expect that by the end of the year, the Conservancy will complete key foundational elements that position us well for the future: brand and organizational structure, staff leads for key organizational functions (e.g. conservation, advancement, finance), major donor program and work planning and multi-year budgeting with the financial model. We plan to work with a Constructive Advocacy and Dialogue at James Madison University to develop the strategic plan, an accreditation requirement, and in the winter, February 7 and March 14.

Given the Conservancy's increased conservation capacity, we have picked up the pace of land protection efforts throughout the year on track to protect almost 2,000 acres, roughly double our annual average. Now that we have a dedicated staff member funding in the Potomac River watershed, we are well positioned to advance land protection efforts in the northern part of the state in the James River watershed. Stewardship fellows are enhancing our stewardship capacity to fulfill monitoring responsibilities as our portfolio grows.

This year, the Conservancy is investing in our advancement efforts by adding a part-time Communications Manager in fall with additional collateral with Wallace 360, and working with Pachira Strategies to implement the recently completed advertising strategy. In spring, we plan to transition to a coordinated regional community engagement strategy bolstered by new board members.

Additional highlights include:

- Strengthening and developing new partnerships with The Nature Conservancy, Conservation Fund, American River Conservancy
- Advancing conservation planning to the next level with partners;
- Working with R. Mason & Company to integrate the recently developed financial model into the accounting process
- Completing updates to human resources policies and procedures.

Additional objectives may surface from board and committee work.



MEETING SCHEDULE

Fiscal Year 2024-25	January	February	March	April	May	June	
1st Quarter							
Conservation	01/13	02/03	03/03				See work plan
Governance		02/10	03/10				Personnel policy, policy handbook
Finance	01/20	02/17	03/17				Annual financial review, model
Advancement	01/27	02/24	03/24				Fundraising plan, outings + events, newsletter
Board	01/27	02/07	03/14				
2nd Quarter							
Conservation				04/07	05/05	06/02	See work plan
Governance				04/14	05/12	06/09	Policy review cycle
Finance				04/21	05/19	06/16	Annual financial review, model
Advancement				04/21	05/19	06/16	VAULT Conference, outings + events, card + appeal
Board					05/28	06/25	

Notes:

- In January, the Board will meet before the Advancement Committee meeting to have a special 30-minute meeting.
- In February and March, the Board will have two Saturday morning meetings for strategic planning beginning at 9:00 am.
- Regular Board meetings will resume in May and June on Thursdays as noted above, beginning at 4:30 pm with a light dinner. The business meeting will begin at 5:00 pm.
- Since strategic planning disrupts the every-other-month rhythm of board meetings, I scheduled board meetings in May and June.
- The Conservation, Governance + Advancement Committees will meet monthly on Tuesday afternoons at 4:30 pm as outlined above. The Finance Committee will also meet monthly on Tuesdays, but in the morning at 8:30 am.
- If we need to cancel Board or Committee meetings, we will let you know, but we thought it was better to have consistent meeting dates on the calendar in case we need them.
- Orange font is used to highlight Committee meetings that are scheduled on atypical dates and Board meetings.



Branding + Communications

> Early assessment of readiness

Noteworthy conservation legacy

Talented, open-minded team

Advanced level of conservation planning

Technological innovations

National accreditation

Recent grant awards > \$1.75 million

> Fresh, forward-looking identity





2023-2024 Annual Report

Celebrating 35 Years of Conservation in the Shenandoah Valley



SHENANDOAH VALLEY
CONSERVANCY
CELEBRATING 35 YEARS

We could not have built such a legacy of conservation without the generous support of people like you. To join us in our mission to protect the Shenandoah Valley, please visit shenandoah.org/donate.

A Growing Legacy of Conservation

CELEBRATING 35 YEARS

1989

Concerned about rampant growth and loss of prime lands, founders begin discussions about a conservation organization



1990

A steering committee forms and Valley Conservation Council incorporates as a 501(c)(3) nonprofit
First public workshops held on conservation approaches and methodologies

1991

First conservation easement protecting 116 acres completed in Shenandoah County



1992

A clear vision emerges for linking sound public planning with voluntary land protection efforts
First riparian easement completed in Augusta County

1993

Land Use and Community Costs in Augusta County published, documenting fiscal benefits of conserved land for the community
Virginia Wildlife Federation awards Valley Conservation Council Conservation Organization of the Year



1994

Plans for the McDowell Battlefield Corridor developed in collaboration with stakeholders, which leads to the protection of 1,300 acres
Historic easement placed on Waverly Hill in Staunton

1995

Focus emerges on protecting watersheds and water quality and mapping wildlife corridors
Landowner secures Jump Mountain in Rockbridge with a 1,000-acre conservation easement



1996

Fishburn Farm, a 70-acre farm near Woodstock, secured with a conservation easement
Identification and mapping of wildlife corridors begins in the Shenandoah Valley

1997

Middlebrook to Brownsburg Corridor Study published, highlighting natural and cultural attributes of this historic, agricultural landscape
Lord Fairfax Soil & Water Conservation District grants Valley Conservation Council Outstanding Conservation Group Award



1998

First of four agricultural and forestal districts in Rockingham County established, which eventually protects 25,000+ acres of significant farmland



1999

Better Models for Development in the Shenandoah Valley published to inform decision makers about conservation tools for conserving vital community assets and managing community growth
Friends of the Potomac awards the organization the Friend of the Potomac Award for Exemplary Endeavors in Conservation

2000

Protecting Valley Battlefields and Historic Lands: A Landowner's Guide published as part of increased attention on threatened Civil War sites
Better Models for Development Awards program launched, which eventually recognizes 83 exemplary projects



2001

Over 22 miles of stream banks protected in partnership with local Soil and Water Conservation Districts



2002

Botetourt Community Partnership launched to integrate efforts to build conservation constituencies in Rockbridge and Augusta Counties

2004

A large number of conservation easements begin being co-held by Valley Conservation Council and Virginia Outdoors Foundation with financial assistance for farming families from the Preservation Trust Fund, a state fund initiated by Valley Conservation Council and its partners

2003

State of the Valley published, assessing implementation of "Better Models" principles, catalyzing a widespread movement of local governments adopting these principles



2005

Workshops hosted to inform local officials and citizens about the widening of Interstate 81 and "purchase of development rights" programs

2006

A record year for conservation with over 21,000 acres protected, including a noteworthy easement protecting 558 acres and a four-mile stretch of the James River

2007

Better Models for Development program expands into a full symposium with guest speakers and tours
Stewards hired to help connect with landowners



2008

First solo conservation easement held on an innovative stream restoration project in Harrisonburg
Three farms protected with conservation easements in Rockbridge County
Save Our Land | Save Our Towns symposium held



2009

Statewide report on agricultural and forestal districts released and an updated *Landowner's Guide* published

2010

Better Models for Development updated with environmental site design and green infrastructure planning and distributed to officials in counties, cities and towns throughout the Valley

2011

Building Livable Communities symposium and Better Models awards ceremony hosted in Harrisonburg
Owner protects Mole Hill, an iconic geological landmark near Harrisonburg, with conservation easement

2012

Planning for Farmers/Farming for Planners symposium hosted in Staunton that drew speakers and attendees from across the state
Garden Club of America awards the organization a Conservation Commendation

2013

Conserving Natural Assets workshop held to train teams on green infrastructure planning; Better Models Awards honored 11 projects throughout the region
Wildlife corridor across Page Valley protected



2019

Receive national accreditation from Land Trust Accreditation Commission
Simmons family protects a 320-acre Century Farm, Big Rock Dairy, in Augusta County

2020

1000-acre easement secured on Sapling Ridge in Page County, which eventually becomes part of Shenandoah National Park
After 30 years, privately conserved land in the Shenandoah Valley grows from 5,000 acres in 1990 to 178,763 in 2020 in collaboration with Virginia Outdoors Foundation, The Nature Conservancy, Trust for Public Land, Conservation Fund and other partners



2021 / 2022

Pioneering remote easement monitoring program implemented

2023

\$750,000 grant awarded from the National Fish & Wildlife Foundation to secure a wildlife corridor connecting the Blue Ridge and Allegheny Mountains in partnership with private landowners in the James River watershed
Visionary private \$1,000,000 grant awarded to establish Valley Green Fund in the Shenandoah River watershed

2024

Valley Conservation Council rebrands as Shenandoah Valley Conservancy
Awarded landmark \$500,000 private donation

2015

25 years of conservation successes celebrated at White House Farm in Page County
Adopted new logo



SHENANDOAH VALLEY
CONSERVANCY

CELEBRATING 35 YEARS

2025

As the Conservancy celebrates 35 years of conservation, landowners throughout the Shenandoah Valley have conserved over 221,000 acres and over 840 miles of rivers and streams



Landowners' Guide

Your Guide to Conservation Easements in the Shenandoah Valley



2025

Fall Outings

CELEBRATING 35 YEARS



Celebrate 35 years of conservation in the Shenandoah Valley — join us for an outing to see conservation in action. For updates and additional opportunities to get outside, see our website at: shenandoah.org

Fall 2025

Protecting the Legendary Shenandoah Valley



September 13

RIVER PADDLE

Explore the James River

Twin River Outfitters,
640 Lowe Street, Buchanan
11:00 AM

Explore local conservation efforts while paddling the Upper James River.

Space limited. Reserve your spot today. Swimming ability and water shoes required.

Suggested donation: \$50 per person. Dependent on river flows and weather.

September 21

NATIVE PLANT WALK

Rooted in the Allegheny Highlands

Sweet Family Farm,
8562 Jackson River Road, Mustoe
1:00 PM

Discover fall flowers and their relevance in our lives with Annette Nabers a homesteader in the Allegheny Highlands. Learn how the Sweet family protected their farm and how they're preparing it for an exciting future.

Easy, level walk. Meet promptly at 1:00 PM.

September 27

CAVING ADVENTURE

Understanding the Underground

Williamsville, Bath County
10:00 AM

Explore karst geology in a local cave in collaboration with the Butler Cave Conservation Society and James Madison University Caving Club. Learn how the Conservancy is working to conserve these unique geological features in the region.

Moderate level caving adventure involving crawls, climbs and mud. Equipment provided. Open to participants 12 years old and older. RSVP required. Location & instructions provided upon reservation.

October 11

HAWK WATCH

Raptor Migration

Afton Mountain: Skyline Drive and Blue Ridge Parkway east of Waynesboro.
10:00 AM

Join the yearly Rockfish Gap Hawk watch and learn about the Conservancy's work to secure wildlife corridors. See raptors soar!

Bring your binoculars and spotting scope if you have them. Open to all ages & free! Location provided upon reservation.

October 19

ANNUAL CELEBRATION

Celebrate 35 Years of Conservation

Brix & Columns Vineyards,
1501 Dave Berry Road,
McGaheysville
5:30 PM

Celebrate the people conserving area landscapes over the past 35 years and our vision for the future over local food and drink.

RSVP requested. \$60 / ticket



November 8

FARMLAND WALK

Farms + Foliage

Seven Bends State Park,
1191 Lupton Road, Woodstock
10:00 AM

Learn about the importance of protecting working farms and forests, along with related public and private efforts.

Open to all ages. State Park parking fee waived for participants. Parking instructions provided upon reservations.



Cave salamander, *Eurycea lucifuga*

To RSVP and learn more, visit: shenandoah.org

Conservation Land

in partnership with



**SHENANDOAH VALLEY
CONSERVANCY**

(540) 886-3541 | shenandoah.org

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Our Story

Adventure 02 – Direct + Sustain the Growth

Increased financial support —————> expanded capacity

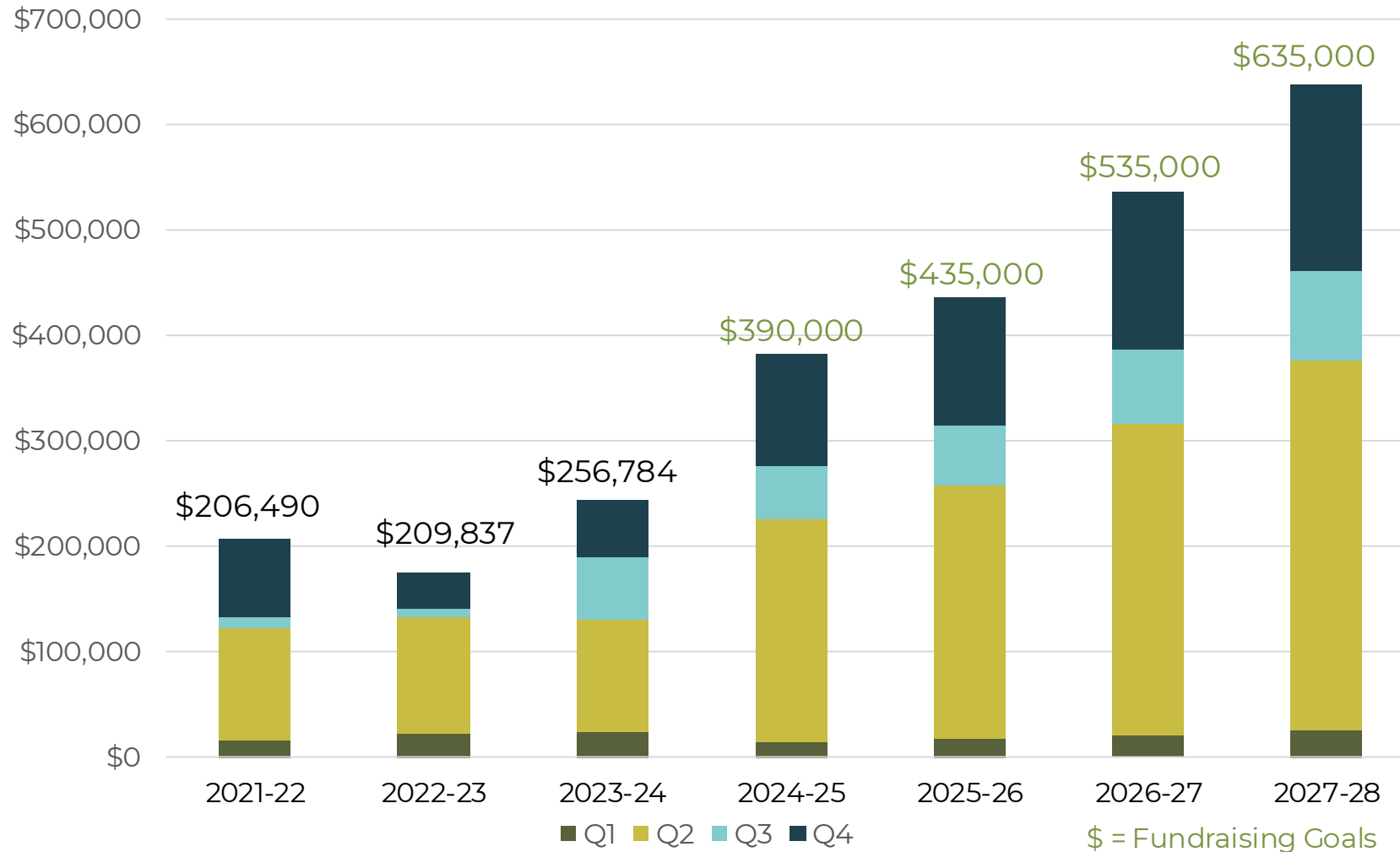
Developed advancement plan + began implementation

Created dynamic five-year financial model + began integration

Restructured organization, updated bylaws + developed new policies



Unrestricted Giving





Financial Model

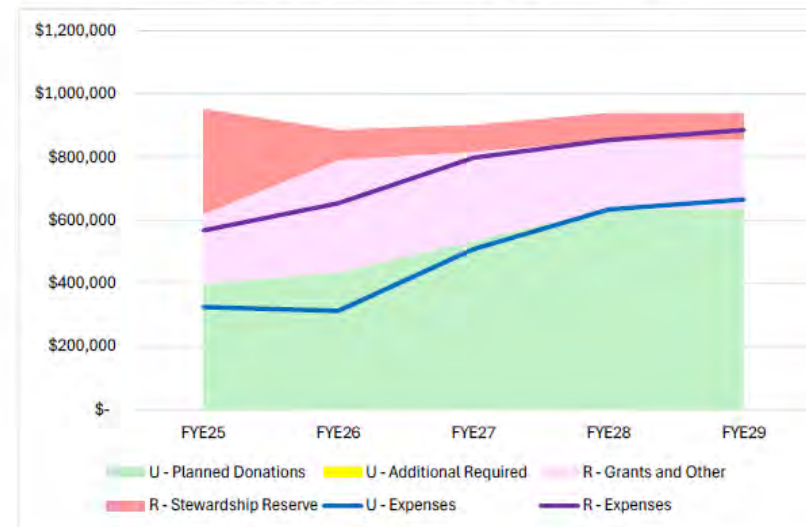
Scenario 1: Base Case - Budgeted Funding

	FYE25	FYE26	FYE27	FYE28	FYE29
Confirmed Donations	\$ 398,436	\$ 435,000	\$ 535,000	\$ 635,000	\$ 635,000
New Required Donations	\$ -	\$ -	\$ -	\$ -	\$ -
Other Sources/Funds	\$ 55,968	\$ 65,000	\$ 75,000	\$ 75,000	\$ 75,000
Total Unrestricted Funding	\$ 454,404	\$ 500,000	\$ 610,000	\$ 710,000	\$ 710,000
Conservation Funds	\$ 129,113	\$ 267,975	\$ 206,930	\$ 145,000	\$ 145,000
Stewardship Funds	\$ 333,478	\$ 95,000	\$ 85,000	\$ 85,000	\$ 85,000
Other Restricted Funds	\$ 35,608	\$ 23,000	\$ -	\$ -	\$ -
Total Restricted Funding	\$ 498,198	\$ 385,975	\$ 291,930	\$ 230,000	\$ 230,000
Total Funding Sources	\$ 952,602	\$ 885,975	\$ 901,930	\$ 940,000	\$ 940,000

Key Assumptions/Results:

- Donations to Follow Fundraising Planned Growth
 - Full Coverage of Planned Growth Expenses
- Grants to Maintain Less NFWF
 - New Grants Expected to Replace Timely
- State Funding to Maintain at \$100k/year
 - Partial Funding of Stewardship Costs

Fundings and Expenses by Category





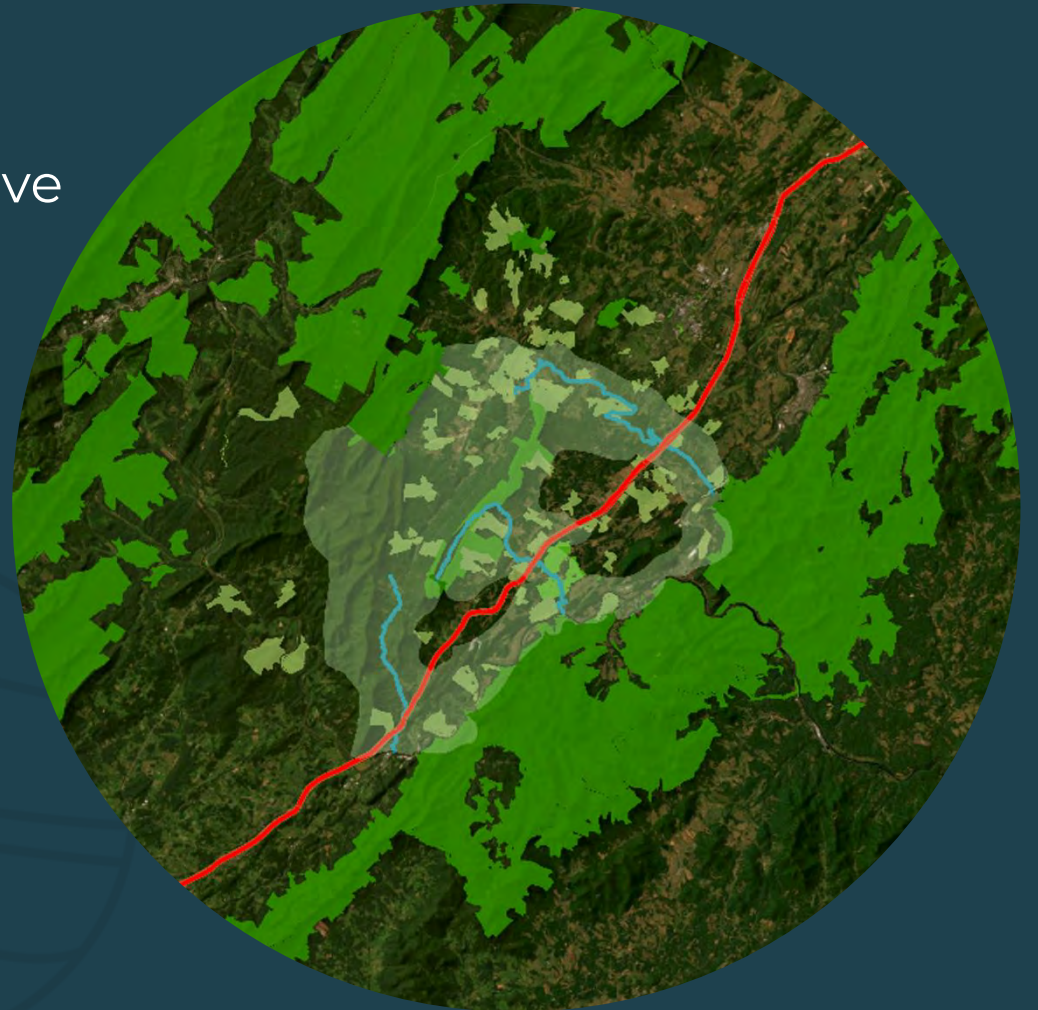
Our Story

Adventure 03 – Scale Up

Strategic Plan 2030

Fundraising: Status Quo > Transformative

> Conservation Plan = Business Plan





Branding + Communications

Katie Wallace | Founder + CEO, Wallace 360



Designing Trust

The Impact of Branding for Land Conservation

Katie Wallace, *Founder and CEO*

wallace 360

Branding Challenges

in Land Conservation



What exactly *is* a BRAND? IT'S
WHAT YOU *LOOK* LIKE (BUT
IT'S WAY MORE THAN A LOGO)
IT'S HOW YOU SOUND IT'S
WHAT YOU DO AND *HOW* IT'S
HOW OTHERS *EXPERIENCE* YOU

A photograph of a group of people in a forest. In the foreground, a man with a grey beard and glasses, wearing a blue and white plaid shirt, holds a small green fruit on a branch. A woman with short grey hair and glasses is in the foreground on the right, looking at the fruit. In the background, a man wearing a grey baseball cap with the word "FORD" on it and a light blue shirt is looking on. Other people are visible in the background, slightly out of focus. The scene is set in a lush green forest.

**IT'S ALL THE WAYS YOU CONNECT
TO THE PEOPLE YOU SERVE**

STRONG BRANDS GO DEEP

Like the valley, forests and water we protect.

AUTHENTICITY • ALIGNMENT • CLARITY • RELEVANCE • DISTINCTION • CONSISTENCY



SHENANDOAH VALLEY
CONSERVANCY

Shenandoah Valley Conservancy is a non-profit land trust dedicated to advancing conservation priorities in the Shenandoah Valley and adjacent Blue Ridge Mountains and Alleghany Highlands by strategically protecting farms, forests, and waterways.

We are focused on protecting the natural landscapes of our service area with strategic and innovative approaches that consider the intrinsic connection between our land and water, along with the plants, animals and people they sustain.

Brand Position

HOW YOU DIFFERENTIATE FROM OTHERS
IN THE MARKET

Brand Promise

THE TANGIBLE, CONSISTENT EXPERIENCE AND
VALUE YOU DELIVER



TRUST & CREDIBILITY

EMOTIONAL CONNECTION

DIFFERENTIATION

UNIVERSAL APPEAL

RECOGNITION &
UNDERSTANDING OF
MISSION/VISION/VALUES

DONOR CULTIVATION
& RETENTION

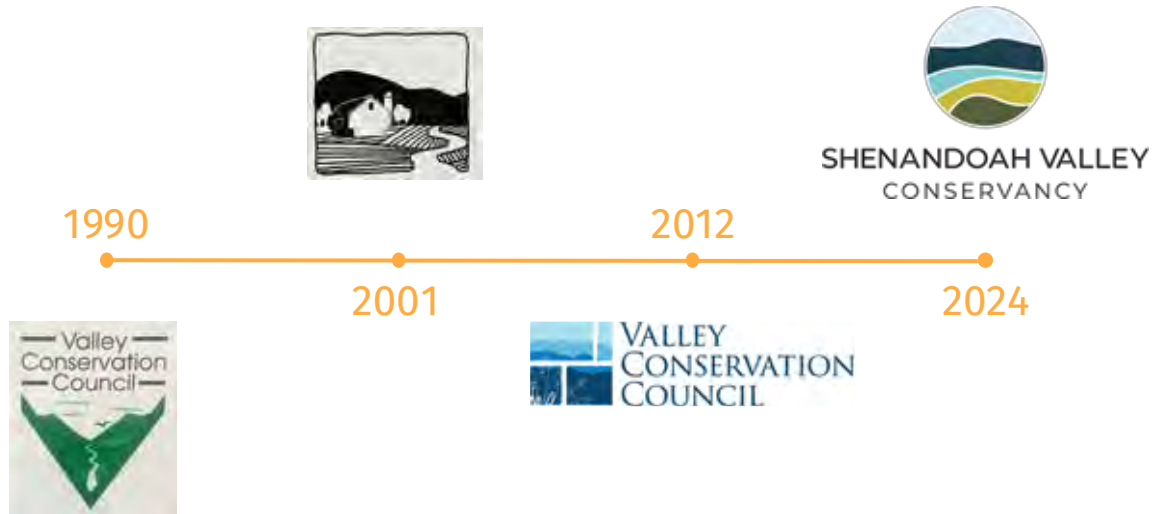
What do strong brands achieve?



SHENANDOAH VALLEY
CONSERVANCY

Designing Trust for an Evolving Brand

An Evolving Organization





SHENANDOAH VALLEY
CONSERVANCY



SHENANDOAH VALLEY
CONSERVANCY

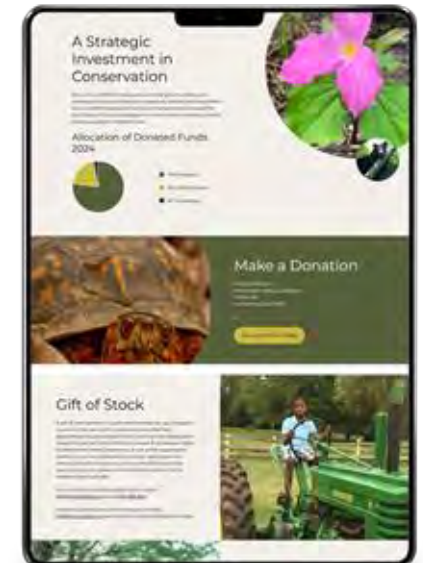
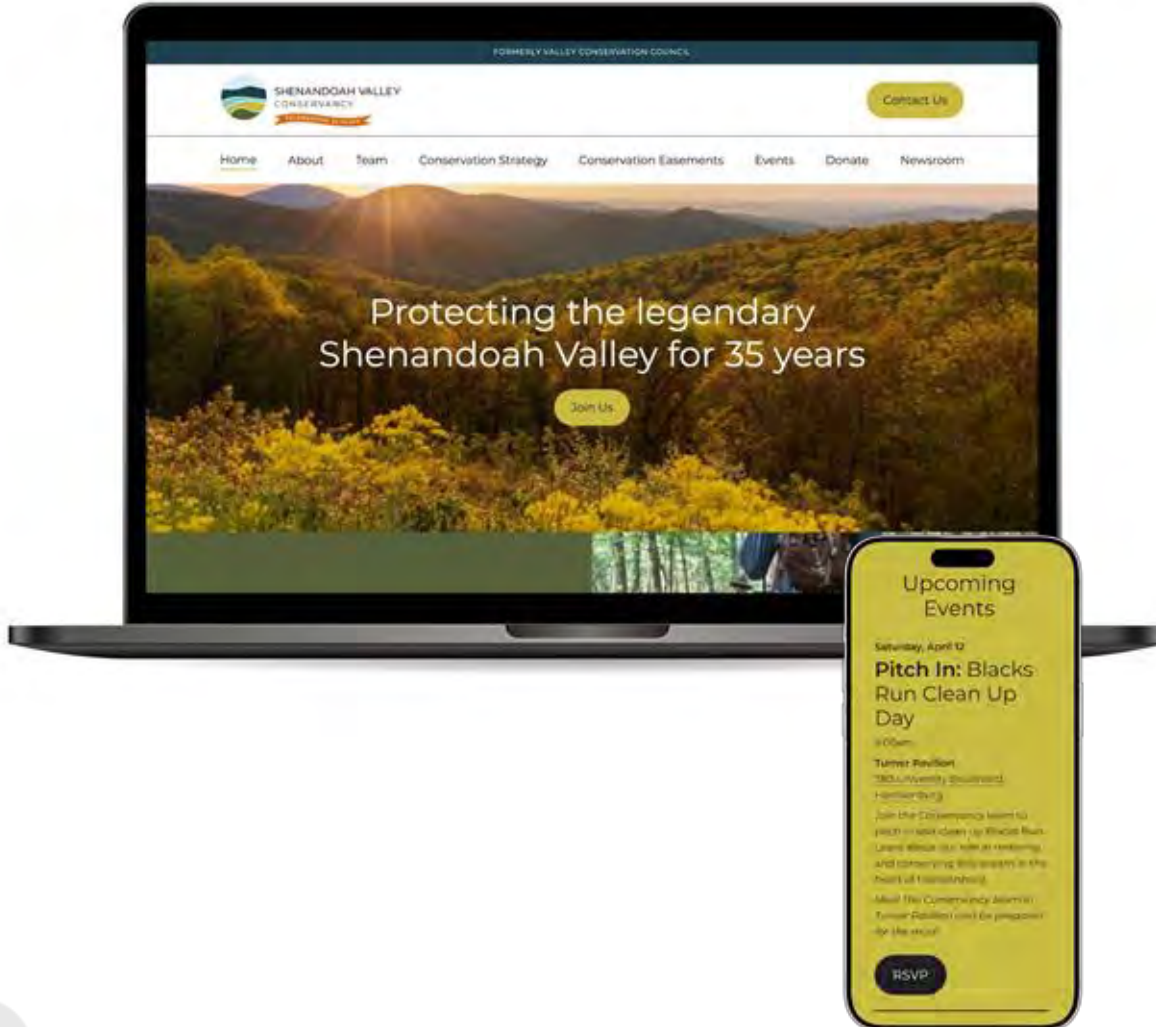


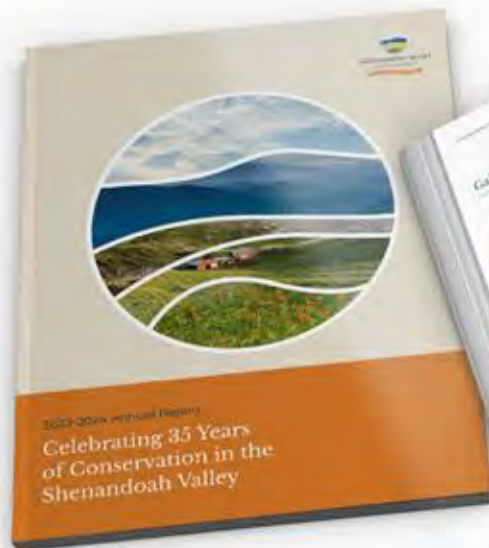
SHENANDOAH VALLEY
CONSERVANCY



SHENANDOAH VALLEY
CONSERVANCY









Beyond Branding

The new brand quickly communicated that change was underway, created immediate trust in the new leadership, reinvigorated giving and meaningful support, building confidence for new growth.

IMPROVED CREDIBILITY &
REPUTATION

INCREASED DONOR
RECOGNITION, TRUST & RETENTION

BROADENED REACH & APPEAL

And this was just the
beginning...

An aerial photograph of a vast mountain range during autumn. The hills and valleys are covered in dense forests with trees displaying vibrant shades of orange, yellow, and brown. The sky is a clear, bright blue with some wispy white clouds. The perspective is from a high vantage point, looking across the landscape towards distant mountain peaks.

Branding + Communications

Discussion



Advancement

Tim Plant | Founder + CEO, Pachira Strategies



pachira strategies

Cultivating Sustainable Growth

pachirastrategies.com

JANUARY 2025

Advancement & Fundraising Analysis

Where SVC stood at the start of the engagement — the baseline Pachira Strategies was brought in to address.

1

Leadership transitions disrupted fundraising momentum and consistency, which weakened long-term donor relationships.

2

84% of donations fell below the \$500 major donor threshold — small gifts dominating the mix.

3

No multi-year pledges committed, limiting revenue predictability.

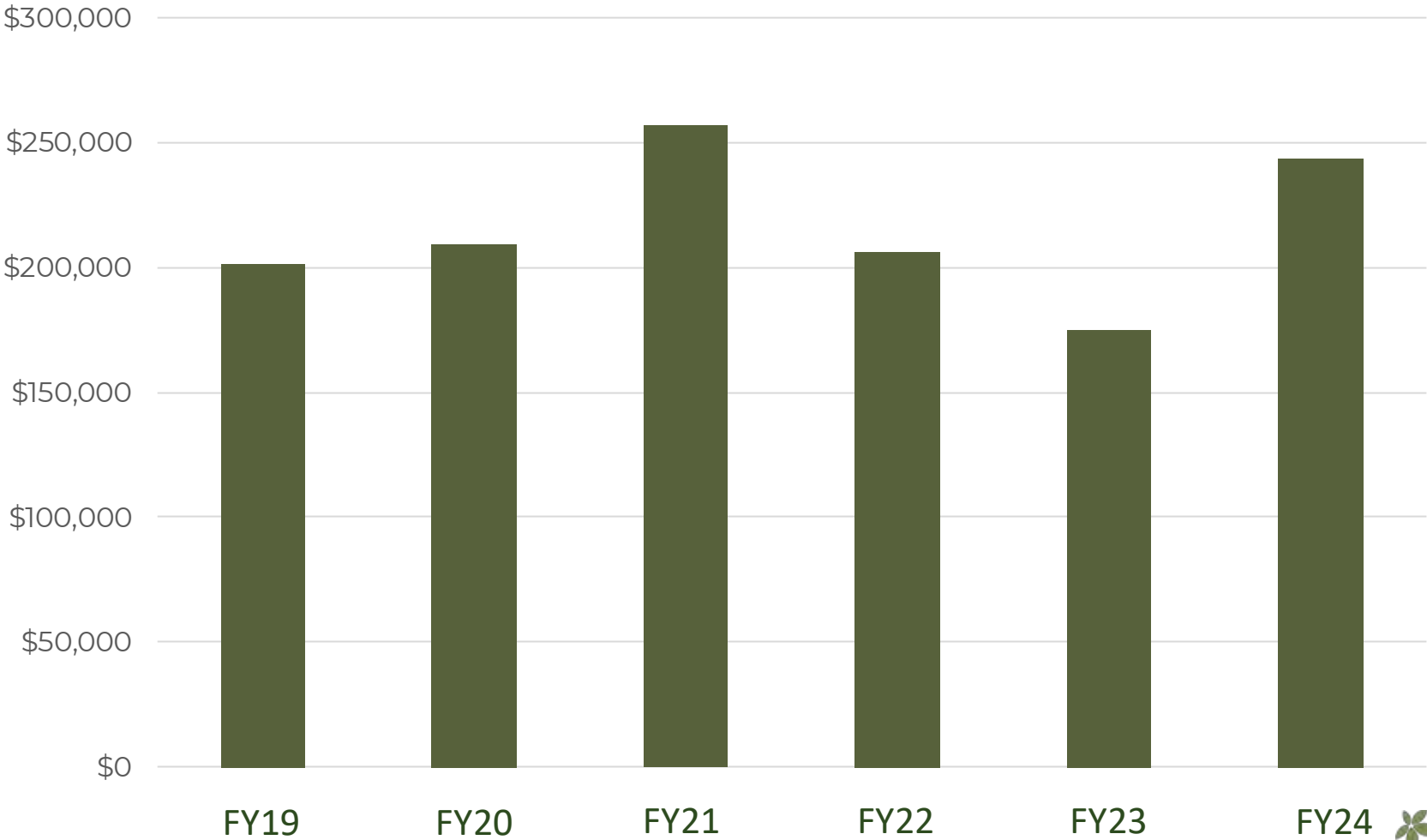
4

Acquisition and renewal rates declining despite a loyal long-term donor base.

5

Early sign of potential: a seven-figure donation in 2023 showed major donors respond to vision.

Unrestricted Giving



Advancement Planning Opportunity

Grant Funding Secured

SVC secured dedicated grant funding to develop a multi-year advancement plan and financial forecasting model. Infrastructure funding is possible — but limited.

Full Leadership Buy-In

Board and staff leadership committed to all planning phases: interviews, data analysis, and day-long planning sessions.

Active Committee

The advancement committee actively participated in plan review stages — the plan is a standing agenda item every month.

Key Objectives of the Three-Year Plan

1 Major Donor Program
Establish gifts of \$10,000+ that create transformational impact for conservation work.

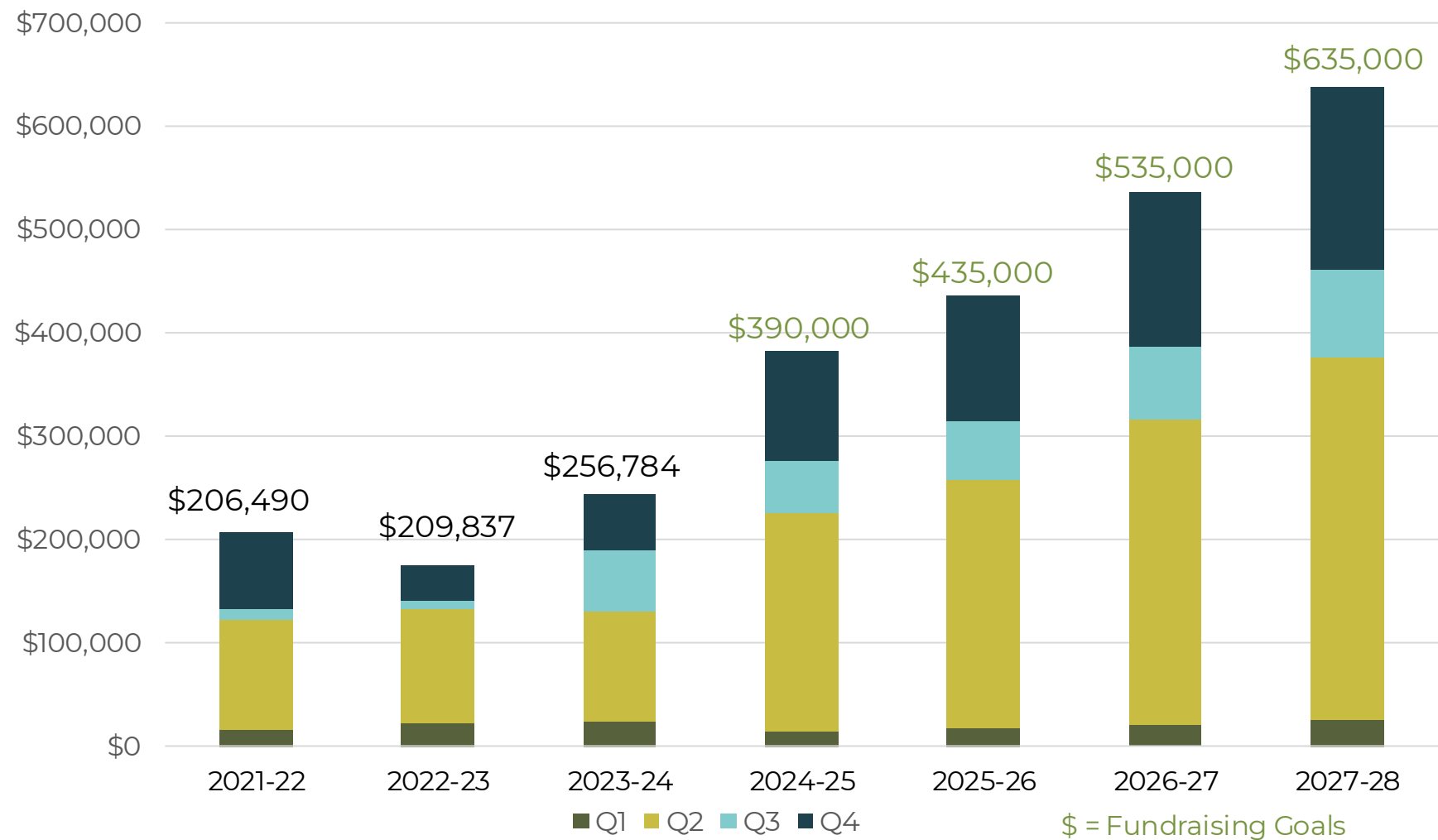
3 Planned Giving Outreach
Build long-term sustainability through estate gifts and other legacy contributions.

5 Staff Resourcing Plan
Enhance the Executive Director's capacity to focus on major donor cultivation and solicitation.

2 Institutional Giving
Support specific projects, events, and high-visibility activities through meaningful institutional partnerships.

4 Investment Gift Opportunities
Identify gifts that accelerate growth without impacting annual fundraising goals.

Our Upwards Trajectory



Countering National Trends

\$592.5B

TOTAL CHARITABLE GIVING IN 2024

Record high — but the story is more complicated.

4.5%

DROP IN GIVERS IN 2024 ALONE

5 consecutive years of decline in donor count.

20M

GIVING HOUSEHOLDS LOST SINCE 2000

StanfordSOCIAL
INNOVATION^{Review}

Beyond the Mega-Gift

By **Mark Dobosz** | Spring 2026

The headline numbers for philanthropy can seem healthy — **total charitable giving reached a new record in 2024.**

However, that figure masks a dangerous concentration in who is giving. For five consecutive years, the total number of Americans giving to charity has declined — dropping 4.5% in 2024 alone.

Two-thirds of American households donated to charity in 2000. That number has fallen to about half — a loss of roughly 20 million giving households.

These missing donors aren't billionaires. If the very wealthy are still giving — even giving more — their dollars are replacing the contributions of teachers, nurses, small-business owners, and retirees: the grassroots base.

Fall 2025 Digital Ad Campaign

Objective:

Generate **new subscriptions to the Conservancy's monthly e-blast** to **generate awareness** of the organization's work and eventually **expand its base of donors.**

Ad strategy:

Reach residents of the Conservancy's service area and those with interest in the Valley from other relevant markets with compelling ad content that **succinctly conveys what the organization does** and **drives them to sign up** with an easy call to action.


shenandoahvalleyconservancy

Conserving the Farms, Forests & Waterways of the Shenandoah Valley



Sign Up for Monthly Newsletter

[Subscribe](#)

Sponsored


Shenandoah Valley Conservancy

Shenandoah Valley Conservancy is a non-profit land trust dedicated to advancing conservation priorities in the Shenandoah Valley by protecting our lands and waters with strategic and innovative approaches that consider the intrinsic connection between our land and water, along with the plants, animals and people they sustain.

Our service region includes eleven counties in the Shenandoah Valley and Alleghany Highlands: Frederick, Warren, Shenandoah, Page, Rockingham, Augusta, Highland, Bath, Rockbridge, Alleghany, and Botetourt.

Sign up for our monthly newsletter with conservation news, updates on local outings and ways to increase our impact. Unsubscribe anytime..

Conserving the Farms, Forests & Waterways of the Shenandoah Valley



Sign Up for Monthly Newsletter

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Protecting A Treasured Landscape

[Subscribe](#)


shenandoahvalleyconservancy

Protecting a Treasured Landscape



Sign Up for Monthly Newsletter

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Sponsored


Shenandoah Valley Conservancy

Shenandoah Valley Conservancy is the only land trust working exclusively to protect the Shenandoah Valley. Since 1990 we have partnered with landowners and other organizations to conserve more than 220,000 acres in the Shenandoah Valley including some of the most productive farmland in Virginia and most biodiverse forest lands and waterways throughout the region.

Our service region includes eleven counties in the Shenandoah Valley and Alleghany Highlands: Frederick, Warren, Shenandoah, Page, Rockingham, Augusta, Highland, Bath, Rockbridge, Alleghany, and Botetourt.

Sign up for our monthly newsletter with conservation news, updates on local outings and ways to increase our impact. Unsubscribe anytime.

Protecting a Treasured Landscape



Sign Up for Monthly Newsletter

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Conserving the Farms, Forests & Waterways of th...

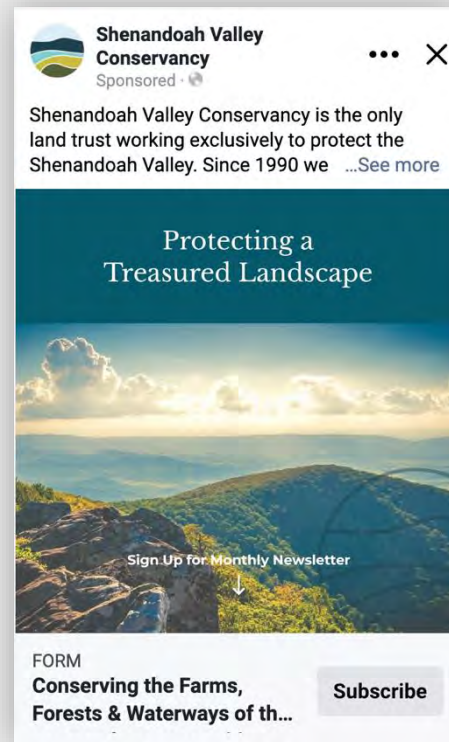
[Subscribe](#)

Fall 2025 Digital Ad Campaign



Static Ad A (Working Lands):

- Leads: **800**
- Cost per Lead: **\$4.66**
- Lead Rate: **0.71%**



Static Ad B (Skyline):

- Leads: **126**
- Cost per Lead: **\$6.13**
- Lead Rate: **0.58%**

Insights & Observations

The **Working Lands** ad outperformed the Skyline ad by a large margin, driving **86% of all subscribers** at the lowest CPL showing farmland and headwaters imagery and messaging resonates most with the Conservancy's audience.

Fall 2025 Digital Ad Campaign

Purpose

Grow the Conservancy's monthly e-blast list to expand future donor pool.

Audience

The Conservancy's **11-county region** + target metro areas of **Richmond** and **Washington, D.C.**

928

Total New Subscribers

\$4.84

Cost per Lead

58.6%

Welcome Email Open Rate

10.9%

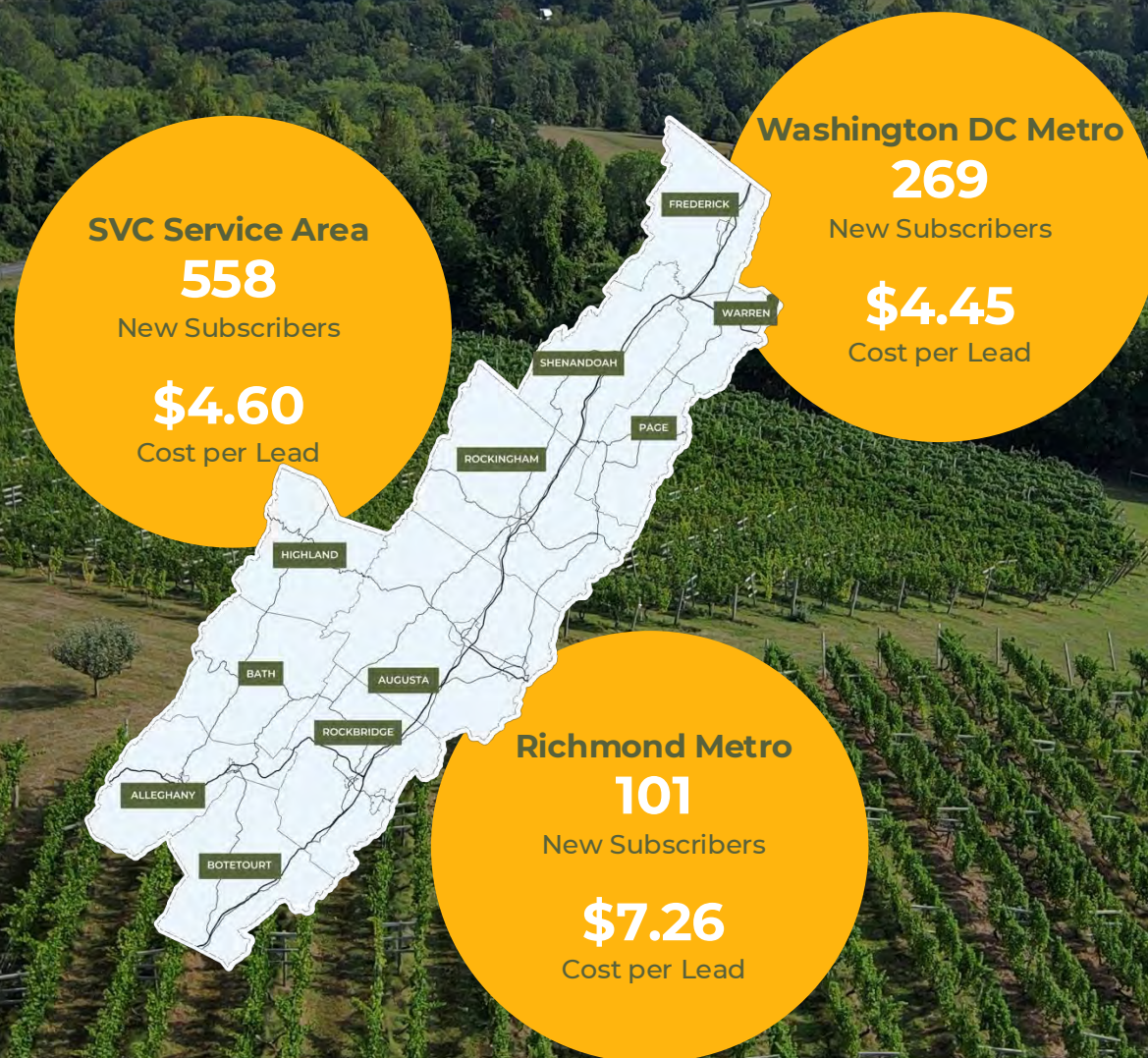
Welcome Email Click Rate

Insights & Observations

- The campaign delivered **efficient list growth** with **928 new subscribers** at a strong **\$4.84 CPL**, well within benchmarks for nonprofit lead generation.
- Welcome email engagement was excellent, with a **58.6% open rate** and **10.9% click rate** indicating the new audience is genuinely interested, not low-quality or accidental leads.
- Early behavior signals are promising; new subscribers clicked through to events, newsroom posts, conservation strategy, and even the donate page, indicating **strong curiosity about the Conservancy's work.**
- The combined performance suggests the audience responding to these ads is a **high-match future donor pool**, as they show immediate interest in learning more about the Conservancy.

Fall 2025 Digital Ad Campaign

Geographic Breakdown



Insights & Observations

- **DC Metro** emerged as a **promising long-term growth and donor-acquisition market**, generating a large volume of subscribers at a CPL comparable to the Conservancy's home region. This suggests a significant pool of people outside the Valley who still feel connected to its landscapes and are receptive to conservation messaging.
- **Richmond** generated fewer leads at a higher CPL but still proved valuable for expanded awareness, confirming that outreach outside the service area can attract new audiences even if at more cost.

Changes Since the Rebranding & Strategy

2x

AVERAGE GIFT SIZE
vs. prior 3-year average

Average gift size doubled over the prior three-year average after implementing the advancement strategy.

- Secured funding to support ongoing plan implementation.
- Accelerated hiring of a part-time fundraising & communications associate.
- Shifting toward programmatic and general operating support — away from position-specific proposals.
- Gifts under \$500 have remained stable.

An aerial photograph of a rural landscape. In the foreground, there are rolling hills with patches of dry, yellowish-brown grass and clusters of trees. Some trees are bare, while others have green foliage. A prominent red barn with a white roof is visible on the right side of the image. In the background, there are more hills and a large, dark, forested mountain range under a clear blue sky.

Advancement

Discussion



Finance

Rob Mason | Managing Partner, R. Mason & Company

FINANCIAL DISCIPLINES & STRATEGY

Building the Financial Foundation for Bold Conservation

Rob Mason

Managing Partner, R. Mason & Company



01 GENESIS OF ENGAGEMENT

How R. Mason & Company and SVC Connected



The Connection

Brought together through shared networks committed to conservation excellence, R. Mason & Company recognized SVC's ambitious vision — and the opportunity to build a financial framework worthy of that ambition.



The Mission Alignment

SVC's mission — to protect the most important and vulnerable landscapes — demanded financial clarity that matched its conservation aspirations. A strong foundation was essential.

02 THE FINANCIAL FOUNDATION

Why Financial Discipline Is Everything



Garbage In, Garbage Out

Inaccurate, untimely, unorganized data produces unreliable forecasts. Every strategic decision downstream depends on the integrity of the numbers at the source.



Discipline Enables Confidence

When the financials are accurate, timely and well organized, assumption bands narrow dramatically — giving leadership the clarity to act decisively.



Confidence Enables Boldness

Boards and stakeholders don't fund uncertainty. Financial precision is what transforms "we think we can" into "we know we can."

Discipline → Confidence → Boldness → Impact

03 RESTRICTED FUND ACCOUNTING

Navigating Complexity to Enable Clarity

Unrestricted Funds

Flexible resources for general operations and strategic priorities

Board-Designated Funds

Internally earmarked for specific initiatives — self-imposed discipline

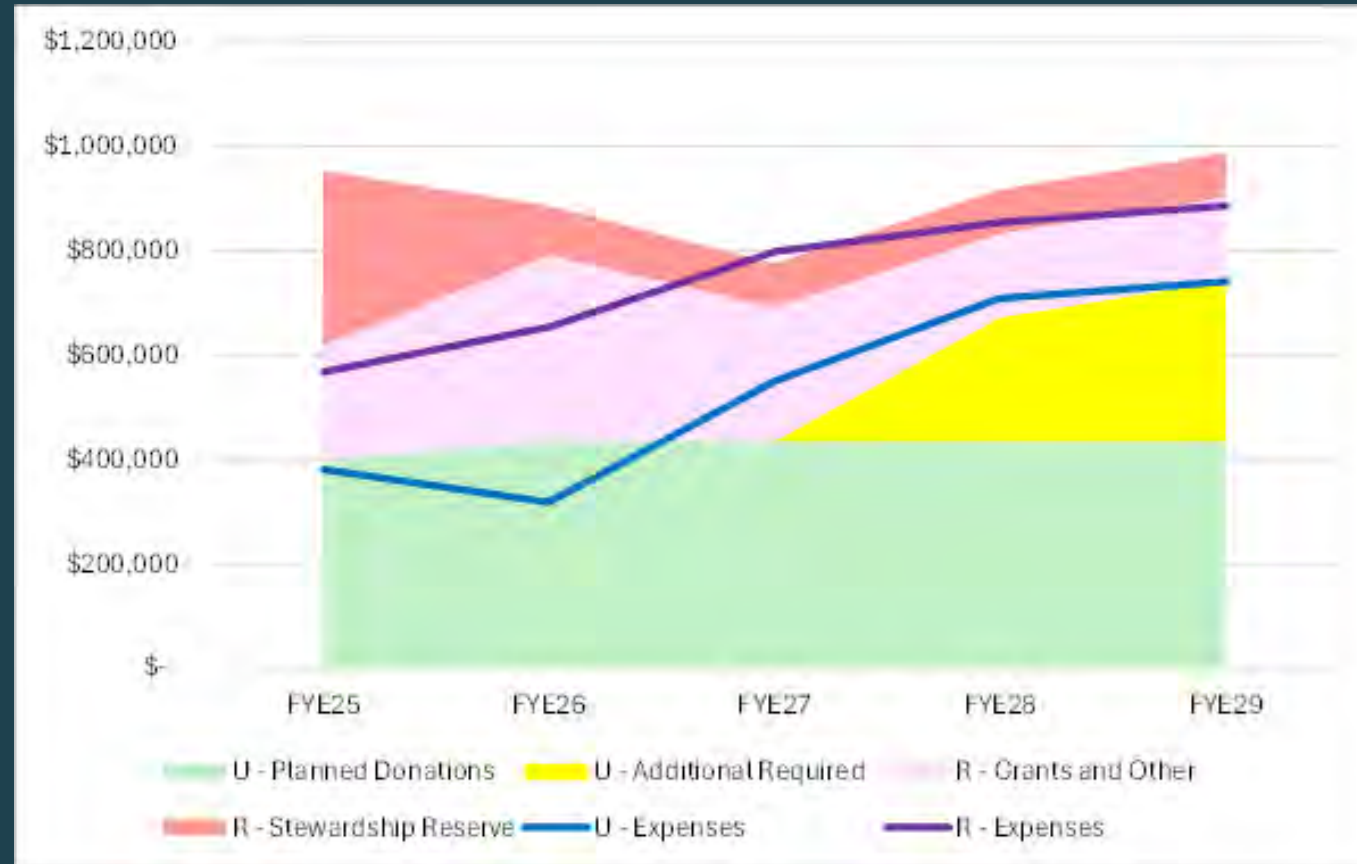
Restricted Funds

Donor-imposed constraints requiring precise tracking and compliance



Broad vs. Narrow Assumptions

Precision in categorization drives model reliability



04 THE POWER OF SYNERGY

Results Greater Than the Sum of the Partners



Financial Disciplines

Accurate, timely organized data leads to precise forecasts, and narrow assumption bands



Branding & Marketing

A compelling story that resonates with donors and stakeholders



Fundraising Strategy

Targeted campaigns built on credibility and clarity



The Feed-Forward Effect

When financial clarity informs the brand story, and the brand story empowers fundraising, each discipline amplifies the others. Confidence builds on confidence.

05 STRATEGIC CONFIDENCE & BOLD EXECUTION

When all three disciplines operate at an elite level, boldness isn't risky — it's responsible.



Strategic Land Acquisitions

Confidently pursue high-value conservation targets knowing the financials will support the commitment.



Multi-Year Campaign Planning

Launch ambitious fundraising campaigns backed by models that demonstrate long-term sustainability.



Stewardship at Scale

Fund endowed stewardship programs with the precision donors require and the impact communities deserve.



Build Multi-Generational Impact

Execute milestones that protect landscapes for generations — because the foundation made it possible.

FINANCIAL DISCIPLINES & STRATEGY

Discussion

"Impact is possible through a strong foundation."

Rob Mason

Managing Partner, R. Mason & Company





Conclusion

Peter Hujik | Executive Director, Shenandoah Valley Conservancy

Katie Wallace | Founder + CEO, Wallace 360

Tim Plant | Founder + CEO, Pachira Strategies

Rob Mason | Managing Partner, R. Mason & Company



Discussion



Thank You

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