

# **Report of Sabbatical Leave Spring 2015**

**Gary Wilson**

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## **Sabbatical Leave Proposal for Gary Wilson**

America's Teaching Zoo at Moorpark College houses the college's collection of about 120 animals. The teaching zoo provides students in the Exotic Animal Training and Management program with hands-on experience in the care and training of these animals as well as in the conducting of wildlife education presentations. I was involved in the design and construction of this facility. We need to expand the teaching zoo to provide the EATM students with new experiences to better prepare them for careers in the animal-care industry. In order for me to take a leadership role in this endeavor, I need to increase my knowledge of current zoo enclosure design and methods of fundraising for capital improvements of zoological institutions. A sabbatical leave would allow me to do this.

The EATM faculty and staff have evaluated the teaching zoo facilities and have identified improvements that need to be made. Michlyn Hines, our teaching zoo operations supervisor, and Kim Hoffmans, our dean, met with Iris Ingram and John Sinutko in September to plan out a course of action to accomplish these improvements. See the attached EATM Specific Facilities Plan for the notes from that meeting. On Friday, November 1, we are meeting with our college president to discuss options for raising the funds needed.

We have never had any member of the EATM faculty and staff with the time or expertise to pursue fundraising in a significant way. Nor have we had anyone with the time to keep up with the most current developments in zoo enclosure design. I am requesting a one-semester sabbatical leave for the Spring semester of 2015. Part of my time would be spent visiting other zoos to learn about advances in zoo design and fundraising. I will be able to see enclosures and talk to keepers and curators to learn about the advantages and disadvantages of various design elements and construction materials. I will also meet with the zoo directors and development officers to learn about fundraising activities they have tried. Zoos I would like to visit include: Los Angeles Zoo, San Diego Zoo, San Diego Zoo Safari Park, San Francisco Zoo, Oakland Zoo, The Living Desert, Phoenix Zoo, Wildlife World Zoo, Reid Park Zoo, Arizona-Sonora Desert Museum. I probably will not be able to visit all of these facilities so I will prioritize this list as work on our teaching zoo plan progresses.

I plan on attending the 2015 annual conference of the Animal Behavior Management Alliance in Copenhagen, Denmark. The specific dates have not yet been set for this conference but it is usually held in April. As part of the conference, I will be able to visit a couple of zoos in Denmark. The conference will be about a week in length and I plan on taking a few days before and after the conference to visit other zoos in the area. Attendance at these conferences helps me to stay current in my knowledge of animal behavior management developments. This directly impacts my teaching of the animal behavior and animal training courses.

The rest of my time will be spent here at the college working on the general EATM Facilities Specific Plan and plans for the individual enclosures that make up the plan as well as leading our efforts to begin a capital campaign to raise the money to accomplish the plan. As you can see from the proposed timeline in the attached EATM Specific Facilities Plan, my sabbatical activities would fit neatly into the timeline.

America's Teaching Zoo is different than most zoos because of the role it plays in the education of the students in the EATM program. Advances have been made in how animals are exhibited and managed in zoos today compared to when we designed the facility in the late 1980s. We need to upgrade enclosures and build new enclosures in order to effectively train our students in these new methods. The design of the new enclosures must incorporate features which will allow us to teach students safely and provide those students with the learning opportunities that will best prepare them for careers in the animal-care industry of today and the near future. The design and construction of enclosures can help or hinder animal behavior management of the animals being housed. In order to work most effectively with the architects helping us to develop our plan, I need to have a thorough and up-to-date understanding of such issues. This sabbatical leave project will allow me to develop such understanding.

The main areas that we have identified as needing to be addressed first are:

1. housing for large carnivores
2. housing and show area for sea lions
3. aviary for displaying birds

Our goal for housing for the large carnivores is to develop new enclosures on the hillside between the zoo and the baseball diamond and the driving range. This would allow us to maintain the animals in much larger enclosures than we currently have, provide the animals with forms of environmental enrichment we have not been able to provide before, and give our students new opportunities in animal behavior management.

A large percentage of students entering the EATM program have an interest in training marine mammals. For almost 30 years, the California sea lion that we kept in our facility provided many students with the experience of caring for and training a marine mammal. This animal passed away in 2009 at the ripe old age of 31. From the earliest designs of the zoo, the master plan has included facilities to house and train marine mammals and our advisory committee has encouraged us to acquire sea lions again. In order to maintain multiple sea lions, new facilities need to be designed and built but there is space within the current zoo footprint to accommodate such facilities.

The best site for a new sea lion enclosure is where our aviary is currently located. There are a few possible locations for a new aviary, including on the hillside. More research is needed to explore possible designs of a new aviary to meet our needs.

I have just turned 59 years old and have been teaching full-time at Moorpark College for 28 years and taught part-time for four years prior to that. I have been granted two sabbatical leaves during that time. I plan on teaching for at least four more years but I can see myself teaching for much longer than that. Part of my desire to develop my abilities in the area of fundraising is so that I may continue to be of service to the teaching zoo even after I retire from teaching.

Successful completion of this project will be measured in the following ways:

- Production of a journal documenting the facilities I visit and the people I meet with as well as what I learn regarding enclosure design and fundraising.
- Production of minutes of facility planning meetings held with the EATM faculty and staff to share the information I have gained through my facility visits.
- Completion of the EATM Facilities Specific Plan including plans for specific enclosures.
- Production of plans, drawings, etc., including project cost estimates, to support fundraising activities.
- Production of a capital campaign plan.
- Production of an account of fundraising efforts through the end of the sabbatical leave.
- Presentation to the Sabbatical Committee of copies of all of the above materials in the Fall semester of 2015.

I hope the committee can see that this project will expand my knowledge, helping me to improve how I teach my animal behavior and animal training courses. It will provide me with the opportunity to develop new skills in the areas of communicating with architects and supporters of our college and teaching zoo. This will benefit our students in both quality of instruction and diversity of learning opportunities at the teaching zoo. It will benefit the teaching zoo in increasing sources of capital funds for on-going improvements to the facility. It will benefit Moorpark College in helping to maintain our reputation for producing highly skilled, knowledgeable, and intelligent graduates ready to work in the animal-care industry. I thank the committee for considering my proposal.

## What I learned from my sabbatical leave

The focus of my sabbatical leave was learning about current ideas in zoo enclosure design and fundraising practices so that I can contribute to the design of the enclosures for the new master plan for our campus animal facility, America's Teaching Zoo, and fundraising for implementation of that plan. I had two reasons motivating me to pursue this project. First, since I was involved in the design of the current facility and, as the most senior faculty member of the EATM department, understand the needs of the program that the facility fills, I can help steer the development of the new facilities to best accomplish the goals of the master plan. Second, the fact that the EATM program and America's Teaching Zoo have never had anyone with the time or expertise to pursue fundraising in a significant way. is the reason that I wanted to learn as much as possible about fundraising for a zoo so as to determine some of the ways we could progress on raising funds for the proposed expansion of the zoo. I was granted the sabbatical leave for the Spring 2015 semester.

I got an early start on the project by attending the annual conference of the Association of Zoos and Aquariums (AZA) in Orlando, Florida, in September, 2014. For the first time, AZA partnered with the International Marine Animal Trainers Association (IMATA) to hold a joint conference. This resulted in the largest annual conferences ever, in terms of attendance, for both organizations. This allowed me to attend several sessions on fundraising and exhibit design that were offered by AZA as well as sessions on animal training offered by IMATA. It also provided me an opportunity to see the animal facilities at Disney's Animal Kingdom and SeaWorld, Orlando. My notes from the conference are below.

When I started my sabbatical leave in January, 2015, I searched for references that could help me learn about fundraising. I found *Effective Fundraising for Nonprofits: real-world strategies that work* by Ilona Bray. My notes from this book are below.

I met with several people in the course of my sabbatical leave to discuss fundraising or exhibit design. These included:

- January 13, 2015—met with Michlyn Hines, Mara Rodriguez, Kris Romero, Alisa Behar, Amy Wagner, Jangeene, and Dina Pielaet to ideas for promoting the 25th Spring Spectacular. Notes below.
- February 9, 2015—met over the phone with Lisa German, MC Foundation Executive Director to discuss foundation's role in fundraising for EATM. Notes below.
- February 19, 2015—met Jen Cull, National Marine Mammal Foundation, at US Navy Marine Mammal Program facility in San Diego to discuss the foundations fundraising efforts. Notes below.
- February 20, 2015—met Robyn Badger, San Diego Zoo Global architect, at her office at the San Diego Zoo Safari Park to discuss the design and construction of Tiger Trails.
- March 28, 2015—met with EATM alumni for Alumni Weekend of Spring Spectacular. I showed a slide show I put together about the America's Teaching Zoo Master Plan in general and the Carnivore Habitat in particular.
- April 10, 2015—visited the Edinburgh Zoo.
- April 13, 2015—met with Warner Jens, curator at Apenheul Primate Park, Apenheul, The Netherlands.
- April 15, 2015—toured Copenhagen Zoo and Blue Planet as part of the ABMA conference in Denmark.
- April 17, 2015—spoke to the animal care students at Roskilde Tekniske Skole, Denmark, about the EATM program, then toured their facility. Then went to Odense Zoo for tour.
- May 3, 2015—met with Tim Wu, Vice President of Development, San Francisco Zoological Society, while in San Francisco to receive the Hal Markowitz Wellness Award.

At one of our staff meetings in November, 2015, I gave a presentation about what I had learned about fundraising on my sabbatical. A copy of the slides I presented is below. This is the outline of the presentation:

### America's Teaching Zoo Giving Populations

- Activities
  - admissions
  - VIP Tours

- Jr. Zoo Safari Day Camp
- Zoo members
  - local community
  - sponsor-an-animal
- events
  - Rendezvous at the Zoo
    - attendees
    - sponsors
  - Small donors
  - Big donors
  - FAATZ
    - friends
    - alumni
      - cultivate giving
  - Potential populations to be developed
    - Corporate donors
      - “official” blank
      - Chumash Casino
        - Native California Wildlife Habitat
    - National community

#### Conclusions:

- Bulk of money will come from a few wealthy donors
  - San Diego Zoo Global—campaign to raise almost \$500 million
    - estimate that 90% of the money will come from 10% of their donors
- Donors require time and attention
  - “institutional hug” —Mark Stuart
- Value we give back is access
  - Need to identify access activities that we can provide
  - Assign values
  - Coordinated effort
- Activities
  - raise public profile
    - marketing
  - identify donors
  - establish clubs
  - cultivate donors
  - special events
- Roles
  - MC Foundation Director
  - College President
  - EATM Faculty and Zoo Staff
    - identify stories
    - provide vision
      - inspire support
      - steer design
- Students
  - tell stories
  - inspire support

## **Notes from AZA-IMATA Conference, September 2014, Orlando, Florida**

### **Designs on the Boards**

Audubon Zoo Cool Zoo

- water area in middle of zero—attractive during hottest part of the year, includes Lazy River
- kids can play in water "shared" with elephants
- elephants can activate water streams to spray kids

Rick Barongi, Houston Zoo

Keith McClintock, Portico Group

Arrival Plaza

- landmark towers—help guests find attractions—tall with animal sculpture, lighted from inside
- Sea Lion Experience
- photo op sculptures
- sea lion caves—cool, shaded space → can setup to feed
- NW coast rock work
- theater—both stage and audience is covered
- went vertical to increase restaurant capacity—2 story

Joe Rohde, Disney's Animal Kingdom

Avatar on Earth

- ideas of love for nature, transformation through adventure, take action

### **Membership Has Its Privileges: the Donor Benefits of Mid-Level Giving Clubs**

Sara Wise, Houston Zoo, Director of Development—swise@houstonzoo.org

- \$100 M since 2002 privatization
- donor clubs
  - Flock—young professionals—\$150/yr. membership
  - Ambassadors—mid-level—\$500/yr.
    - Engage young families in philanthropy
    - Looking for next generation leaders
    - Includes family membership, admission to five events per year including Gala
    - Young executives, doctors, lawyers, etc.
    - Some join for value but a lot join for philanthropic reasons
    - Told story about the importance of taking care of donors
  - Asante—VIP donor \$1200/yr.
- \$768,000 per year revenue
- Events
  - Winter Gala
    - Recruitment and stewardship
    - Tables start at \$2000 (accessible)
    - Very successful but very time-consuming
  - Family breakfast
  - Two cocktail events
  - Winter Lights (previous)
- eliminated \$250 original level
- Increased number involvement in Gala—auction, restaurants
- Consolidated events
- Improved connection—more education and animal interaction
- Elevated other events to differentiate from Gala

April Strickland, Virginia Aquarium and Marine Science Center  
Junior Board—Aquarium Connection

- in 20's, children of members, organize events

Colin Borck, Chicago Zoological Society, Individual Giving Director— colin.borck@czs.org  
Bison Circle

- \$1,500-25,000
  - 2 events, behind-the-scenes animal encounters, passes
  - Create new experiences
  - tier and rate experiences
  - tiers
    - 1500-2500
    - 5,000-10,000
    - 25,000
- cheaper alternative for general public—candidate pool to recruit

### **Capital Campaigns**

Laura Berger, Kansas City Zoo

- feasibility study—time consuming and costly (\$20-30k) but learn about other campaigns, new funders
- Honorary chairs (prominent families), chairs, campaign cabinet
- identification of prospects
- support materials—can work as a PowerPoint as well as printed
  - campaign description
  - Campaign notebook (history, care for support, etc.)
- frequency of meetings—not more than once a quarter

Rocky Kettering, Texas State Aquarium, Corpus Christi  
\$50M capital campaign

strategy

1. Culture of philanthropy—launch campaign with best practices
2. Culture of asking—sustain campaign with best options (don't be bashful)
3. Culture of collaboration—close campaign with best people—be set up for next campaign

Transition plan

- voice and tone—sounds true, sincere, consistent
- preliminary marketing materials need to become fabulous
- close with ambassadors, philanthropist, community
- computer-generated walk through
- Currently at \$27 M

### **Annual Fund Gifts**

Suzanne Thompkins, Zoo New England (Franklin Park Zoo, Stone Zoo), VP Development

- database software Raisers Edge
- data mining for prospects
- annual fund called "Zoo Champions Fund"
- annual gift = unrestricted
- campaign calendar
- data input set up with reports in mind
- consistent message to donors from different departments during tours, etc.

Jim Kirschner, Miles River Direct

- annual appeal should target individuals
  - start with board members, portfolio donors, contributing members
- focus on who is giving and how much to ask for—not should we ask
- solicit 2-3 times per year



- difficult to convert member to a donor—need to focus members who are more likely
  - signs—renewed by mail not web
  - more years as a member
  - individuals are better than families
- avoid mailing at renewal time
- lapsed members → not likely donors
- take annual out of your annual appeal—ask more frequently, ask for more than one gift a year—up to six asks
- not summer, not mid-term election times
- best months—November to February
- donors give to solve problems, not to celebrate past successes ("top 10 zoos in America")
- donors give because it feels good
- create case statement for giving to institution—"private giving is essential"
- one-page letter
- set personalized ask points that make sense to the donor
- easier to get two gifts than one larger gift
- format
  - problem
  - solution
  - how gift helps
  - ask
- full-color photography implies no need

Bianca McCarthy

Supporting Cast: Beyond the Letter

- data—track donors' interests, event attendance, connecting via social media
- engage—social media, on-grounds signage, connect donor with keeper
  - Twitter allows immediate communication
- give access instead of premium gift
- app should have way to give
- signage should give instructions on how to give easily—on-line giving tools
- don't mail to states you are not registered in

### **Exhibit Design—Innovations**

Mayan Reef app—Aquarium of the Americas

Mayan Dive Adventure

Scott Barton, CEO Chaffee Zoo

Keith McClintock, Portico Group

Sea Lion Cove

- inspired by Pt. Lobos
- plants—native & drought-resistant; set up for gray water irrigation
- 5 Locations for training
- sand beach for kids to play
- non-releaseable brown Pelicans
- 12' deep pool, lots of 4' deep areas
- DG pathways—pervious
- underwater viewing—dining
- movable kelp forest
- 200,000 gals.— \$10.4 M
- closed filtration system
- Perlite filters—backwash into simulated wetlands
- increased Zoo attendance by 28%

Bob McClure, SDZ Safari Park

Tiger Trails

- \$20M
- over 5 acres
- 3 enclosures
- guest comfort-shade, water elements, misters
- built into forested area
- woven stainless steel black anodized
- training wall—keeper talk
- long house anchors exhibit—floor is roof of tiger night quarters
- rope pull
- varied experience of seeing tigers above, below, and on-grade
- view through exhibit out to San Pasqual Valley

Dan Maloney, Jacksonville Zoo and Gardens

Land of the Tiger

- \$9.7 M
- 11 month construction
- 2.5 acres
- 6 animal species
  - Sumatran and Malay tigers
  - otters
  - 2 species of pig
  - hornbills
- elevated mesh tunnels to move tigers around plus corridors behind exhibit
- tigers get more exercise
- interaction area for special groups—brush warty hogs
- strangler fig vines
- training wall—elevated → better viewing
- babirusa can go into tiger space to leave scent

Jon Brangan, Brevard Zoo

Meerkat Hamlet

- \$482,000
- long, linear exhibit
- started with 1 dik-dik and 7 meerkats → now 15 meerkats and 0 dik-dik
- engraved decking—fundraiser

Doug Piekarz, Akron Zoo

Grizzly Ridge

- \$12.8 M
- red wolves, otters, Passerines, bald eagle, coyote
- rope bridge in aviary—very popular
- grizzly training wall
- otter slide—tube for kids going through otter pool

Alicia Bintondo, Monterey Bay Aquarium

Tentacles

- cephalopod exhibit
- flapjack octopus—deep water
- Vampire squid

John Aikin, Exec. Director, Palo Alto Junior Museum and Zoo  
Weaver bird House

- \$25,000
- Taveta Weaverbirds

Ken Frye, Scovill Zoo, Decatur, Illinois

Ana Hernandez

Penguin exhibit

- \$1.75 M
- training wall
- pop-up dome

Rob Shumaker, Indianapolis Zoo

Jorge Martinez

Orangutan Center

- multiple buildings and outdoor spaces
- overhead cable pathway with bridges that can be disconnected—80 feet high
- gondola system to get people eye-level with apes
- functionally naturalistic, not visually naturalistic
- apes move more
- Rocky
  - interactive tasks with guests—cooperative problem solving

Cat Crossings

Cat trail system at Philadelphia Zoo

- 20 cats can be moved to any exhibit and walkway
- animals can see each other
- hub—multi-story
- animals watch people

Sponsorships

Naples Zoo

- better to get one \$25K sponsorship than several \$2,500 sponsorships
- market pricing
- internal costs
- pre-pitch feedback
- organizational point person
  - avoid multiple requests
- internal communication and buy in
- exclusivity—may be flexible
- loyalty vs. firing a sponsor
- multi-year commitments—only have to renegotiate some sponsorships each year

Columbus Zoo

Partnerships instead of sponsorships

- 6 half-million dollar sponsors
- know your value
- benchmark against competition instead of industry peers
- differentiate from competition
- what does sponsor want—constantly evaluate
- not just a sign—an experience, package program
- renewal starts immediately
- document everything—gain insight into partner, foster connection, personal (birthday cards, shirts, etc.)

Kansas City Zoo

- privatized in 2002
- Maintaining fundraising event sponsor

## Notes from book *Effective Fundraising for Nonprofits: real-world strategies that work* by Ilona Bray

### Chapter 2: Fundraising Tools

pg 6 A successful fundraising program must budget for the long term, not just immediate results, with plans for such things as donor recruitment, cultivation, stewardship, and acknowledgment.

pg 10 Development Director — people person who genuinely enjoys interacting with others.

"Remember, asking for money is just a small part of the greater—and often more fulfilling—process of building the nonprofit's relationship with donors."

pg 17 An advisory council is a group of people whose responsibilities include little more than offering advice on what the nonprofit is or should be doing. For fundraising, it can be a source of additional friends.

pg17-18 Additional staff. First priority is usually a development assistant who handles the mail, maintains database, checks email, prepare and mail thank you letters, other day-to-day tasks. Development associate is like a director in training; works side by side with director. Some larger organizations assign subject areas with their own tasks, e.g., one person responsible for donor care and feeding, other person responsible for grant writing.

pg 19 Need information on activities of the organization so these stories can be utilized in fundraising. **Stories of graduates as well as stories of students and animals at the zoo.**

pg 20 Internal marketing—internally publicizing the work of the fundraisers to motivate staff to communicate with fundraisers.

pg 23 Rules to inspire volunteers for the long term:

- Understand and respect people's motives for volunteering.
- Train volunteers well and ask for a specific commitment.
- Make volunteering as convenient as possible.
- Find ways to allow volunteers to have fun.
- Show your appreciation early and often.

pg 24 Volunteer matching organizations:

- Clearinghouse for Volunteer Accounting Services (CVAS) at [www.cvasusa.org](http://www.cvasusa.org)—accounting services.
- Make a Difference Day at [www.usaweekend.com/section/MDDAY](http://www.usaweekend.com/section/MDDAY)—October event sponsored by USA WEEKEND magazine for volunteers seeking projects for one-time work. Register project ideas.
- Taproot Foundation at [www.taprootfoundation.org](http://www.taprootfoundation.org)—grant application results in placing teams of professional volunteers with expertise in IT, marketing, design, finance, strategic planning, and human resources with nonprofits in major US cities.
- Volunteer Match at [www.volunteermatch.org](http://www.volunteermatch.org)—largest online network of nonprofits recruiting volunteers.

pg 29 Outside consultants and contractors—can post requests for volunteer consultants or search for and read profiles of consultants for hire at [www.idealists.org](http://www.idealists.org).

pg 29 Avoid three common problems with consultants:

1. Start by making sure you remain the boss in the relationship.
2. Carefully define in advance exactly what the contractor will do on your behalf, when the job will be completed, and how much it will cost.
3. Be sure that the services to be completed according to the contract are ethical, honest, and follow fundraising approaches with which you are comfortable.

pg 29 Don't hire outside contractors on a commission basis—that is widely viewed as unethical and, in some states, is even illegal.

pg 30 Practice saying what you need to in 30 seconds or less to sum up what your organization does. Also, have succinct answers to follow-up questions such as:

- What would you do with \$10,000?
- Tell me about the needs of your constituency.
- Who are the other service providers in your field and what makes you special?
- Tell me about the composition of your board of directors.
- What made you get into this field?

### Fundraising Skills

pg 31 Interpersonal skills—a fundraiser's ability to relate positively to his or her fellow human beings is crucial to that person's long-term success. Networking with other fundraisers is important; worthwhile joining national or local groups such as Association of Fundraising Professionals ([www.afpnet.org](http://www.afpnet.org)).

pg 31 Writing ability—important to be able to write effectively.

pg 32-33 Writing tips:

- Write like you talk.
- Find out what makes your own writing flow.
- Be your own editor:
  - overlong sentences
  - boring or extraneous words
  - potentially misleading word order
  - passive voice
- Never, ever send anything out without a final read through.
- Lose the lingo.

pg 37 Records—tips for grassroots organization still working its way towards a database:

- Keep every last scrap of paper.
- Write a date on everything.
- Write down your sources for information.
- Write down the context in which you gathered information.

pg 37-38 Database advice:

- Idealware at [www.idealware.org](http://www.idealware.org).
- Techsoup at [www.techsoup.org](http://www.techsoup.org).
- ebase at [www.ebase.org](http://www.ebase.org).
- Technology Grant News at [www.technologygrantnews.com](http://www.technologygrantnews.com).

Spend 0.25% to 0.50% of annual budget on database software.

pg 41 Besides database for donor information, may need to track how moneys received were used.

pg 42-43 Make it easy for supporters to give. Credit card donors give more. Typically there is a set-up fee (usually <\$200), a monthly or annual fee (<\$15/month or \$150/year), and a charge per transaction (usually either 1.5% to 15% of the amount of the transaction, or a flat fee of 10-75 cents, or a combination).

### Chapter 3—Developing your fundraising plan

pg 46 To create fundraising plan for the next one to five years:

- Determine a reasonable dollar goal to work toward.

- Evaluate your organization's greatest fundraising assets.
- Create a strategy that uses these assets to most effectively reach potential funding sources.
- Write down your strategy in a short, easy-to-understand document to keep everyone on plan in the future.

pg 47 Help with strategic planning: [www.bridgespan.org](http://www.bridgespan.org) (under "Publications & Tools," choose "Strategic Planning")

pg 54 Some granting organizations will not give to a nonprofit whose administrative costs are too high a percentage of its budget.

pg 55 Look at areas where your organization might be able to charge a reasonable fee for services or benefits it's currently giving away.

pg 56 Wish list of items people can give as in-kind donations. Donations of professional services.

pg 59 Identify your assets, e.g., your reputation, a building, a truck, low employee turnover, etc.

pg 60 Identify your organization's weaknesses.

pg 61 Lupe Gallegos-Diaz—teaches fundraising at UCB, example of national Chicano studies organization: large membership but 80% of members were financially challenged undergraduates, 20% were underpaid faculty—started campaign asking for donations of at least \$1—>got people into the habit of giving.

pg 61-62 List assets, including people, and think about how best to use them.

pg 62 Volunteers often suggest doing a special event. Special events are, on average, the least profitable form of fundraising.

pg 64 Develop strategy—need to know budget or goal. Strategy should depend, in part, on organization's identity—stay within boundaries of strategic plan and mission. Diversify funding sources and activities.

pg 65 Fundraising must be an expression of a group's philosophy and identity.

pg 65 Focus on individual donors. "How Nonprofits Get Really Big" by William Foster and Gail Fine, *Stanford Social Innovation Review*, Spring 2007.

pg 66 Ideal—mix of stable sources providing bulk of budget with some additional sources to provide balance, create future potential, and fill in gaps. No more than 20% of total funding from any one person or source.

pg 67 Spread out fundraising responsibilities among staff.

pg 72 Helpful components to include in final plan:

- time duration of plan—usually one year but can be helpful to have projections
- description of various goals
- calendar showing what you'll work on month by month
- breakdown of responsibilities
- how you'll measure interim success (revisit plan at least quarterly)
- backup plans

#### Chapter 4—Attracting individual supporters

pg 77 Individual donors typically account for over 75% of all funds raised by nonprofits.

pg 78 Reputation eventually affects organization's ability to attract financial support. Main metric people look at is the proportion of funds being recycled into administration and fundraising instead of fueling the core work of the organization. A ratio of more than 50% of your funds going to administrative costs is generally considered too high (Better Business Bureau Wise Giving Alliance recommends that no more than 35% of total funds raised be churned back into fundraising and that 65% of budget be spent on program activities). Wise Giving Alliance's recommendations are at [www.give.org](http://www.give.org) under Charity Accountability Standards.



## Meeting Notes

Michlyn Hines, Mara Rodriguez, Kris Romero, Alisa Behar, Amy Wagner, Jangeene, and Dina Pielat  
January 13, 2015

Promoting 25th Spring Spectacular  
perhaps graphic illustrating history of SS  
Nine animals still here that were here 25 years ago  
March At the Movies spot promoting SS  
Facebook—daily posts  
San Diego Zoo has two full-time people doing posts  
Getting foundation involved

Alisa German  
MC Foundation Executive Director  
February 9, 2015 via phone  
Vice chairman is Howard Davis  
foundation—flaws in structure  
Would prefer all gift giving go through foundation with earmarks.  
Will present to board of trustees (year-end summary) then talk to vice-chancellor  
Wants to make it easy for people to give  
After that—being able to take credit card payments at zoo—wants to facilitate this  
Foundation meets Wednesdays at 7:45 every other month.  
Would I serve on board?

Jen Cull  
National Marine Mammal Foundation  
February 19, 2015  
Met at US Navy Marine Mammal Program facility in San Diego.  
Example of good website is Tennessee Elephant Sanctuary  
Link using Twitter for donations  
get a celebrity (movie, studio trainers) to tweet about us  
Facebook likes—Throwback Thursdays (photos from graduates)  
Training on how to ask  
Morris Animal Foundation  
free webinars—website?  
YouTube channel

Mark Stewart  
Development Director  
San Diego Zoo Global  
February 19, 2015  
Met at his office at the San Diego Zoo  
Fundraising starts with the relationship with the donor first. The asking for money comes second.

Institutional hug—idea that donor feels this warm embrace from every interaction with the institution so that it is natural for them to want to support the institution. Some of the things they do include live call to thank donors for their gifts and create a scrapbook for each donor. Mark told me this story: A very wealthy donor (close to a billionaire) had renewed his membership in one of the zoo's giving clubs. Mark called him and thanked him for his donation of \$2500. There was silence on the line. Mark asked if he was there and the man replied that he didn't know what to say because no one had ever called him to thank him for a donation of \$2500. He was so impressed he was going to send another donation of \$2500 and Mark did not need to thank him. Mark said, "But I will." The man said, "But you don't need to." To which Mark said, "But I will."

Fundraising process: Identify potential donor — Interest the donor in your work — Engage the donor — Steward the donor

The case for support comes from your vision. The size of the gift is proportional to your vision. Bigger the vision, bigger the gift.

Maybe establish a Visitor Board to provide giving leadership and gifts.

Phoenix Philanthropy Group could provide counsel on fundraising (analysis of our situation). Might cost \$25-50K.

SDZ don't start on a project until they have 80% of the money pledged.

Can learn a lot from Association of Fundraising Professionals website and local chapter. Mark said I would learn more from them from AZA.

## Presentation to EATM Department and America's Teaching Zoo Staff



### Fundraising for America's Teaching Zoo

What I learned from my sabbatical leave

### Motivation for project

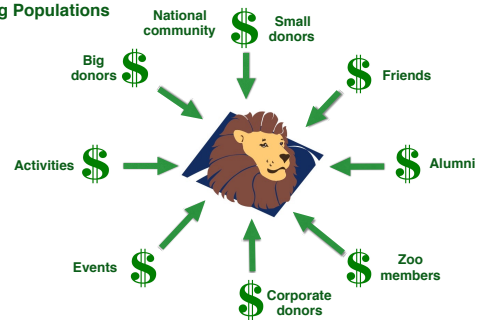
- New zoo master plan
- No one at EATM with time or expertise to pursue fundraising in a significant way



### What I Did

- Attended fundraising sessions at AZA conference in Orlando in September, 2014
- Read *Effective Fundraising for Nonprofits: real-world strategies that work* by Ilona Bray
- Talked to Jen Cull (National Marine Mammal Foundation), Mark Stuart (San Diego Zoo Global), Robyn Badger (San Diego Zoo Global architect), and Tim Wu (San Francisco Zoological Society)

#### Giving Populations



#### The Players

MC Foundation  
Executive Director

College President

Chancellor

EATM Faculty  
& Zoo Staff

Students

#### Actions

- Raise public profile—marketing
- Identify donors
- Establish giving clubs
- Cultivate donors
- Design special events
- Impress donors
- Inspire support
- Identify donors
- Provide vision
  - inspire support
  - steer facilities design
- Identify donors
- Identify stories
- Tell stories
- Inspire support