



To: Fundraising & Sponsorship Committee

From: Shirlene Curtis CFRE
Executive Director of Development

Subject: **FULL-TIME CAMPAIGN STAFF**

Date: 2010-09-03

Summary:

This report recommends the addition of three full-time staff to facilitate campaign planning and build long term fundraising organizational capacity.

Recommendation:

It is recommended that we begin to develop organizational capacity for the Capital Campaign with the recruitment of three key positions: Campaign Director; Prospect Research Officer; and, Campaign Communications Co-ordinator

Financial Impact:

Revenue is projected at \$5 million in pledges and \$2 million in banked revenue in 2011 with the successful close of lead gift prospects. Wages and benefits will be offset by funds raised. We estimate annual salary and benefits totalling \$200 thousand for these positions. The funds are included in the 2011 Operating Budget submission.

Background:

The Development Division (staffing in part by former Foundation staff) was established in May 2009, and in January 2010 a new Executive Director of Development was recruited. In January 2010, the priorities for phase two of the campaign were approved and represent approximately \$39 million in private sector funding. KCI's contract concluded on 2010-05-30 at which time a number of deliverables were completed: Case for Support; identify and qualify lead gift prospects; and cultivation meetings organized for the Executive Director of Development. While we are planning to engage campaign counsel in the short term to continue with campaign planning, we would like to transition these activities to in-house staff over the longer term. More specifically, the staff roles and responsibilities are described as follows:

Position Descriptions:

Campaign Director:

- Provides back-up support to Executive Director of Development, the staff lead on the campaign
- Oversees all aspects of the campaign

- Manages monthly Campaign Cabinet meetings
- Ensures all prospect research profiles are completed, and prospect briefing materials are prepared for solicitation team
- Manages and tracks the major gift prospects and ensures all prospect meetings are scheduled and co-ordinated as required
- Ensures all recognition and stewardship activities are executed
- Reviews all proposals, donor agreements etc prior to sign off by Executive Director
- Keeps leadership team to task and deadline
- Prepares monthly tracking and financial reports
- Monitors campaign revenue and expense budgets
- Ensures all Development staff and Business Development Officer are working to the requirements of Moves Management processes
- Ensures prospect coordination and clearance process and reviews requests for prospect clearance form the Business Development Officer

Prospect Research Officer:

- Reports to Campaign Director
- Identifies and profiles individual, corporate and foundation donors, and researches prospects for major gifts, endowed gifts and other special project funding
- Provides written profiles and reports about specific donors and prospects, containing an analysis of information gathered from public sources
- Uses initiative and sound judgement in carrying out related responsibilities within the framework of campaign policies and procedures
- Strategizes with Development and Campaign staff regarding prospect identification and collaborates to develop donor prospect reports appropriate to campaign needs
- Prepares briefing notes to Campaign leadership, staff and volunteers to prepare them for cultivation, solicitation and stewardship calls

Campaign Communications Co-ordinator:

- Reports to Campaign Director
- Provides writing and communication support in all aspects of campaign communications and creative to specifications as outlined by Marketing and Communications
- Writes funding proposals
- Develops and executes regular campaign updates newsletter Zoo staff, Board and external audiences
- Develops and executes special Campaign appeal and updates letters for prospects and donors
- Provides communications assistance for stewardship reports and recognition events
- Writes Donor agreements
- Provides assistance preparing briefing notes and informational packages
- Works with Public Relations staff to ensure media releases, announcements and engagement as appropriate for Donor events and gift announcements

Conclusion:

It is prudent to transition from campaign counsel to in-house staff starting in 2011. If these staff positions are not added to the complement, the campaign and organizational capacity will be compromised and force the Zoo to look to a costlier option to support the campaign through the use of consulting services.

Shirlene Courtis CFRE
Executive Director, Development