

## APPENDIX R

# Fundraising for Government-Funded Shelters

*By Karen Hollish, philanthropy consultant*

*“So ... exactly how much money would you be expecting me to raise in the fundraising program’s first year?”*

*I was sitting across from the county animal shelter director, in an old trailer that held the organization’s administration offices and the dangerous dog hearing room. He wanted to start a development program for the government shelter, and he was considering hiring me to do it.*

*“Hmmm,” he mulled. “A million dollars. Yes, a million dollars would be great!”*

*This seemed like an insane goal for the government agency to set. But still, I was inspired by the organization’s work and I decided to take the risk. Four years and more than \$7 million later, we can say that government shelter fundraising programs absolutely can succeed.*

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**With local governments facing competing taxpayer demands and never-ending funding cuts, only the most generous municipality budgets provide lifesaving-level funding to their local shelters.** And while most municipal shelters struggle with sub-optimal operating budgets, very few have started fundraising programs to bridge those critical resource gaps. The prospect of government-run shelters building a robust fundraising program is often seen as impossible, unethical or even illegal, but none of this is true. As demonstrated by my experience with Pima Animal Care Center (PACC), a large county-run shelter in Pima County, Arizona, a strong development program can help municipal shelters increase staffing levels, provide team members with quality training and equipment, and ensure that pets’ medical and behavioral needs are met.

In just under four years, the development program I started at PACC raised more than \$7 million in critically needed support for the county shelter. When municipal shelter leaders

put sensible fundraising policies in place, invest in a trained development officer, and give him or her a central role in their organization, their shelters could experience similar success.

## Where PACC was

Pima County, Arizona, is a sprawling geographical area that's approximately the size of Vermont. PACC provides animal care and control services to almost all the jurisdictions in the county, and takes in nearly 18,000 lost and homeless pets per year. As of December 2017, PACC began working out of a brand new shelter, funded by a bond proposition passed by voters in 2014. It is currently saving more than 90 percent of the pets it takes in annually (90 percent is the industry standard for no-kill status).

PACC employs three full-time veterinarians (and a fourth, donation-funded vet is on the way), a team of medical technicians, a training and behavior coordinator, four foster-care coordinators, on-site and off-site adoption coordinators, and many more lifesaving positions, including staff members dedicated to pet retention, cat care and trap-neuter-return (TNR) for community cats. Many of these positions are funded by donations. In addition, PACC has well over 700 active and engaged volunteers, who are critical to the organization's success.

The situation was quite different when I was hired in March 2014 to start a development program for the shelter. Not only was I the first development officer for the shelter, I was the first for the county government. While many governments have grant writers and grant managers on staff, few employ directors of development, who are trained to build relationships with thousands of supporters making many different types and sizes of gifts.

During my first week, I was given a small office (that served double-duty as a storage space) and an old computer with Chameleon shelter software access. No proper donor database existed, many of my frontline county colleagues saw our clients as the enemy (not prospective donors), and we had a widespread reputation across the community as “the pound,” a place with poor outcomes. Despite these odds, by the end of my first full fiscal year, we had beat that annual \$1 million goal. And we continued to shatter our fundraising and lifesaving records in the years to come, thanks to donors who supported our work.

In those early days, donor help was desperately needed. When I joined the team, PACC had just hired its first shelter veterinarian, Dr. Jennifer Wilcox. A true visionary, Dr. Wilcox and her single technician worked out of a 500-square-foot room that they had turned into a MASH-style triage space. Equipped with donated medications and rudimentary equipment (for example, they had to choose between plugging in the laptop or the medication refrigerator), they worked to save the lives of the most sick and injured of the pets that PACC took in.

Before Dr. Wilcox's arrival, a veterinary team focused on spay/neuter was in place, but PACC provided almost no additional services to shelter pets. The ailments so often seen at open-admission government shelters — conditions such as broken bones, infected eyes,

distemper and parvo — were not treated. It was only because of grit, gumption and over-extended rescue partners that PACC was saving about 70 percent of pets. This marked significant progress from years before, but it was not where the community or PACC wanted to be.

## How we attracted donors

To begin raising money immediately, we began actively telling our stories and sharing behind-the-scenes views of the lifesaving work being done by Dr. Wilcox and her small team. We explained how we faced a unique challenge, because we turned no pet away. Historically, local donor dollars had been directed almost exclusively to limited-admission, private nonprofit shelters. To begin attracting private investments from our community, PACC needed to tell its unique story, and explain how we were different from other shelters because no pet was turned away. We worked to show the community that PACC was now saving pets who had been injured or abused — and that we were inundated with them and needed their help. We stressed that donations to the county shelter were still tax-deductible, per Internal Revenue Code § 170(c)(1). As we spread this message on television, on social media, in newsletters and in other public outreach venues, our supporter ranks and gift revenue began to grow.

Right away, we tackled the low-hanging fruit. As the county shelter, PACC manages licensing of dogs. By simply adding a request for a donation onto the annual license renewal form, PACC was already raising (before I arrived) more than \$100,000 a year. When I came onboard, we began thanking those donors in a more timely manner, and including pictures and stories of pets the donors were helping to save in the thank-you letters. By simply stewarding those donors better, we managed to increase that gift revenue to nearly a quarter of a million dollars per year (the annual salary and employee-related expenses of two full-time vets).

We identified donor data that PACC never knew it had. Many charities rent lists of names to solicit, but as a shelter that did more than 10,000 adoptions each year and utilized hundreds of volunteers, PACC had a built-in database of prospective supporters. These people knew about PACC's mission, and their lives had been enriched by volunteering with or adopting from us. We identified those who resided in our community's most affluent ZIP codes, and these names (combined with the names of people who had made a donation at the time of licensing) allowed us to send our first direct-mail appeal to about 2,000 households. We had a very high response rate (about 10 percent) and we raised nearly \$40,000.

We also found people who could help us start a nonprofit. Development is a team sport, and I was lucky to be mentored and supported by several veteran fundraisers and local champions, including Barbara Brown, who was a vice president at our local community foundation. With their help, we founded the Friends of Pima Animal Care Center, which would become the nonprofit partner to PACC.

While Pima County and PACC could accept donations on behalf of PACC and were providing donors with a tax receipt, some donors (especially those who wished to make very large gifts) were more comfortable giving to a 501(c)(3) nonprofit. The Friends of PACC served that purpose of being a trusted entity for donors, and it was also able to respond to the shelter's needs more nimbly than what could be done through the county. For example, government agencies have complex procurement rules, and items must be purchased from specific vendors and in certain quantities. While this system is designed to protect taxpayer investment, it is not always helpful when there is a disease outbreak at the shelter and a new medicine is needed immediately.

Governed by a nonprofit board of directors, the Friends of PACC could quickly meet those needs. Within two and a half years of founding the Friends of PACC, we raised enough funds for the nonprofit to hire its own executive director, who now works full-time to raise funds on behalf of PACC pets. None of this would have been possible if we had not asked for and accepted help from the more seasoned experts around us.

## Seizing opportunities

Development officers are trained to make connections and build lasting relationships. Having a person on staff to seize opportunities is essential, as our work with Best Friends Animal Society proved. During my second week on the job, I received news that representatives from Best Friends Animal Society were coming to Pima County to evaluate us for a possible Community Cats Project (CCP) grant. This grant to launch a CCP would be worth nearly \$1 million, and would provide PACC with three full-time staff members and program support for three years. At that time, PACC was euthanizing about 1,600 community (aka feral) cats each year. We had no resources to give these cats time to decompress in the shelter setting, and local ordinances cast trap-neuter-return (TNR) efforts as “abandonment.” Our overall save rate for cats hovered near 50 percent, with nearly 8,000 cats surrendered each year, many of them kittens born to feral moms. We had no programs to help them.

I stepped up to manage the visit from Best Friends staff, and with my mentor Barbara's help, we planned for them to meet with key county leaders, shelter staff, volunteers, private veterinarians, business leaders, directors from other animal welfare organizations and other friends of the shelter. During the visit, it became clear that they wanted to pick PACC for this opportunity, but they were concerned that our community did not seem to have the veterinary capacity needed to sterilize 5,000 community cats a year. Our shelter could not do it, and private vets would be paid a flat-fee “charity rate.” No vets we met with wanted to do 5,000 charity surgeries on feral cats annually.

With only 24 hours before their departure, we went into overdrive. We identified a local veterinarian — Dr. Karter Neal of Santa Cruz Veterinary Clinic — who might be up for the job. Dr. Neal is an ace high-volume spay/neuter vet, and she is philanthropic. She's also an old

colleague of Dr. Wilcox's, so we seized the opportunity. On the evening before Best Friends' staff departed, Dr. Wilcox and Dr. Neal spoke at length. And on the way to the airport, we took Best Friends' staff to meet Dr. Neal, who said she would do the job. By the time the Best Friends representatives got on their plane, we seemed to be true contenders for this game-changing grant.

While Best Friends mulled its options, we worked internally to make ourselves more competitive for the gift, putting in motion plans for the county to match some of its own funds toward the grant, and change the local ordinance that prohibited TNR. The next three months were stressful, as we met many political and procedural roadblocks along the way. Having a dedicated development officer in place meant that I was there to help overcome those obstacles. In the end, we received the \$1 million grant, and PACC began its CCP program in the fall of 2014, just six months after I started.

The program served as the catalyst for many good things to come. Immediately, we stopped euthanizing 1,600 community cats each year; immediately, we had more room in our kennels and could give more attention to adoptable cats; immediately, we began seeing a decrease in kitten births and an increase in our save rate. None of this would have been possible if we had not had a team member dedicated to securing the funding and building donor trust.

More opportunities, both local and national, came as a result of our association with Best Friends, and because PACC had a development officer on board, these opportunities were seized and maximized. Best Friends exposed us to another large grantor, and when its leaders visited us for a tour, we rolled out the red carpet, and gratefully accepted their advice and help. We received several small grants for adoption events, and provided them with stellar reports on the success of their investments. Over time, their investments in our organization grew, resulting in grants that funded several years of a full-time off-site adoptions coordinator, an adoptions van and a pet retention program. Over time, more national funders and local major donors joined them and invested in PACC. All of this was contingent upon PACC having a full-time staff member dedicated to managing those relationships and building new opportunities, too.

## Putting guidelines in place

Over time, we put sensible guidelines in place so that fundraising could work more effectively. We built policies and procedures in response to issues that arose and were impediments to the development program's success. For example, during my first year, we received notice that a donor had left a tremendous planned gift valued at more than \$1.2 million. The county had never received such a gift, and no one was sure how it should be handled. Should it go into operations, new programs or a type of savings account? How we handled this gift would either discourage or encourage others to leave a planned gift.

My director and I worked carefully with the county administrator's office to design a bequest investment plan that ensured this gift would fund visionary supplemental programs and honor the donor's intent. The investment plan included starting a behavioral and training program, sustaining grant-funded programs like the CCP beyond the Best Friends grant expiration date, and adding a key second member to the development team. After PACC publicized this planned gift, we received more inquiries from donors who wished to do the same.

With so much increased interest in giving to PACC, we took the opportunity to draft the enclosed guidelines (see the memorandum at the end of this appendix) for handling donations. They explain where donations will go, how they will be used and what donors can expect when they give to PACC. Municipal shelters may wish to emulate these guidelines from the outset, in order to set up their programs for fast success.

## Making donors key stakeholders

For a municipal shelter to succeed in raising funds, donors must have a "seat at the table." It's a role filled by the development officer, who advocates for donor interests and spreads a donor-centric culture.

When shelter programs are starting or ending, major operational changes are being considered or public messages are being issued; how donors will receive this news must be considered. And in almost all municipal shelters, donors are not considered stakeholders, so this can be a difficult adjustment. You might be thinking, "We're used to wondering what our staff members, elected officials, advisory board members, volunteers and the media are going to say. And now we have to think of donors, too?" Well, yes.

PACC's fundraising program reached its highest levels of success when development became a key part of the leadership cabinet and strategic planning team. For example, several years into my tenure, we received a grant to start a pet support center phone bank, which would help people keep their pets, rather than surrender them to the shelter. As part of the grant, we would launch a managed-admissions program and, for the first time ever, we would require appointments for the surrender of healthy, owned pets.

This presented a messaging challenge, because much of our local fundraising success had been driven, up to that point, by the narrative that we helped every pet in need and we never turned away an animal at risk. So, while switching to a managed-admissions program was absolutely the right thing to do, we had to manage the rollout of this program and its messaging very carefully. First, we got our internal stakeholders on board, then we called major donors individually to share this news, and finally, in our public messaging, we stressed how this programming would help keep families together and how we would always remain the community's refuge for pets at risk. In the end, we modified our narrative

to meet our organization's growth and donors continued to support us, because they had been properly tended to.

## Hiring a development officer

As you think about building a development program, you may be inclined to add these duties to someone's already full plate, or to make a lower-wage, entry-level hire in order to save money. Don't do this: A large municipal shelter needs a full-time, trained development professional to succeed. It is an investment that could yield great rewards.

The enclosed draft job description (at the end of this appendix) for a director of development is an excellent starting place, and you can search for a local Association of Fundraising Professionals group to help advertise your position. There may be a small posting fee, but it's well worth it. For my position, a veteran fundraiser sat on the interview panel. Having a similarly skilled individual on your panel could be very beneficial for your shelter, especially if nobody on your team speaks "fundraising" yet.

## Conclusion

As I think back to that day when my first director set forth our fundraising program's ambitious goals, I remember what the shelter felt like then — how we struggled to meet pets' most basic needs. Water dishes went empty, pets slipped through the cracks, and thousands of animals didn't make it out each year.

While many funding needs still remain, there has been so much progress, driven by donors and community support. Today, a team of veterinarians serves Pima County's lost and homeless animals, a larger and better-trained staff helps the public, and a new, community-supported building welcomes Pima County citizens.

There is no magic bullet for municipal shelters that wish to emulate the successful trajectory of Pima County, but hiring a development officer is a very good start.

## Functional Job Description for Director of Development

**SUMMARY:** This position is responsible for advancing the mission of Pima Animal Care Center through strategic fundraising, communications, marketing, and community engagement. This position reports directly to the department director of Pima Animal Care Center.

### **FUNCTIONS:**

- Leads all aspects of fundraising for the shelter.
- Directs solicitation and acknowledgement strategies for annual giving, planned giving, major giving, event giving, in-kind giving, grant writing, and all other avenues of philanthropic support for the shelter.
- Directs coordination of all public-facing messaging with Central Communications.
- Leads the development of relationships with individuals, foundations, corporations and organizations within the County and beyond to further financial support of the shelter.
- Researches innovative animal-welfare grant opportunities and pursues them so the shelter can be at the forefront of lifesaving trends.
- Ensures that the philanthropic portion of annual operations budget is met through monetary gifts, grants and in-kind support.
- Designs, manages and invests annual budget for granted marketing dollars.
- In collaboration with program staff, Central Finance and Procurement, designs grant-funded program budgets and manages their spending.
- In collaboration with colleagues and organizational leaders, prepares position statements, leadership memorandums, and policy proposals.
- Leads shelter's marketing efforts in order to position the organization as local, regional and national animal-welfare leader and garner financial support.
- Studies trends in shelter fundraising, marketing and community engagement, and recommends and implements national best practices for the shelter.
- Assigns, trains, supervises and evaluates work of subordinate staff.
- Provides support for supervisors and organization leaders to help them achieve their fundraising, marketing and communications goals.
- Serves as key member of shelter's strategic planning team by helping plan, evaluate and improve programming across the organization.
- Recruits, trains and directs fundraising volunteers.
- Performs other duties as assigned.





# MEMORANDUM

Community and Health Services

Date: July 19, 2016

To: C.H. Huckelberry  
County Administrator

From: Jan Leshner   
Deputy County Administrator

Re: **Direction for Donations Made to Pima Animal Care Center**

## Introduction

On October 29, 2015 you approved an investment plan for the strategic use of two bequests for Pima Animal Care Center (PACC) that allowed for lifesaving and care initiatives that could not have been provided without the generous support of donors. Your approval of that plan identified four areas of investment for which the approximately \$1.1 million received from the bequests was earmarked.

Philanthropic donations to PACC continue and it is important to the success of the Center and future fundraising efforts that the use of those dollars be clearly delineated. Your approval of this memorandum will provide the direction needed to ensure that charitable dollars supplement the services provided by Pima County.

It is important to note that a separate corporate entity, Friends of PACC, has been established and raises funds that are managed by the Community Foundation of Southern Arizona and that inure to the benefit of PACC and the animals that are in our care. While discussions have begun about how Friends of PACC might best assist PACC and the community through the solicitation of money and/or in-kind goods or services, the guidelines delineated in this memorandum address solely those funds or services received by Pima County or PACC and not Friends of PACC. Should the volume and intensity of development activities continue to grow it may be appropriate at some future date to explore whether such efforts might be contracted to this or other non-profit entity or entities.

## Background

Pima County is responsible for the regulation of dogs running at large and assists in the control and prevention of rabies. Additionally, five jurisdictions have delegated authority under an

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intergovernmental agreement to enforce their animal welfare codes to include licensing, investigating animal cruelty and neglect, and sheltering related functions.

Policy direction provided by the Board of Supervisors and supported by the community through the overwhelming approval of a bond issue in November 2014 to build a new facility indicates an expectation for modern, state of the art practices and a humane animal care facility. These expectations for services exceed the County's basic, statutory mandate and create a need for support beyond what might be provided by tax resources of the County or the contributions of our partner jurisdictions contributions.

Recognizing this need, in March of 2014, Pima County added a Development Officer to the staff at PACC to help cultivate the additional resources that are needed to help meet the increasing performance expectations for PACC. The development function provides a mechanism for interested donors to contribute to the mission of PACC by supporting its operations with supplemental resources.

PACC currently budgets approximately \$600,000 in donations each year. These come from a variety of sources including small gifts made at the time of licensing, grants from animal welfare entities, strategic investments on the part of individual donors, and bequests. The donations are intended to supplement rather than supplant support that is provided by the County and its partner jurisdictions for mandated services. They are therefore used primarily for medical care of homeless pets in the PACC facility, spay and neuter programs, adoption programs, and other special needs.

The long term benefit of such donations are substantial: 1) homeless pets benefit from modern humane animal care and sheltering practices; 2) partner jurisdictions benefit from fewer fertile animals running at large, shorter shelter length-of-stays and improved adoptability of animals in custody, and increased adoption placement; 3) tax-payers benefit from decreased need for tax-payer support for non-mandated services and operations; and 4) Pima County benefits from responsible, strategic and impactful investment in the health and wellness of the community.

### **Discussion**

As philanthropic donations are a critical revenue stream, it is important that such revenues are transparently managed in order to continue to enjoy the support of our generous community. Those philanthropic contributions made to PACC in excess of the budgeted donation goal should not lessen the cost liability for Pima County or our jurisdictional partners. Instead contributions made to PACC in excess of the budgeted donations should provide for supplemental investments that County leadership determine are needed but that are also in keeping with the donors' intents.

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Your October 2015 memorandum provided direction for the strategic use of charitable dollars. With your approval, the four areas targeted for investment – long term sustainability of the community cats spay/neuter project, development of a behavioral rehabilitation program for dogs, creation of a pet resource center at PACC to support current pet owners and decrease pet intake, and the expansion of the development program – will be continued and funded through one of the funds established for long term sustainability.

In keeping with development best practices, donations made to PACC will be used as directed or restricted by the donor. Donors will have the option of directing their gifts to the following funds:

- a. Medical Fund: Gifts to this fund underwrite extraordinary medical care that PACC provides to our community's homeless pets who come to PACC neglected, abused, injured or ill.
- b. Spay and Neuter Fund: Gifts to this fund help make spay and neuter surgeries affordable and accessible for all Pima County residents' pets, and they help make this procedure free for all free-roaming, community cats.
- c. Adoption Fund: Gifts to this fund help underwrite our efforts to permanently place pets into homes.
- d. Unrestricted Fund: Donations to this fund will be used where they are needed the most to meet the needs at PACC to benefit our community's pets.

When or if donors do not specify a particular fund for their donation, their gift will automatically go into the Unrestricted Fund.

These designations reflect the organizational goals and programmatic priorities of PACC while providing transparency to potential donors.

Like all donations made to benefit the animals at PACC, planned gifts will be utilized as specified by the donor and in keeping with the strategic priorities of the County. When an unrestricted planned gift is made to PACC, it should be used to fund supplemental programs and services that cannot be funded within the budget approved annually by the Board of Supervisors.

These one-time contributions require the development of a plan document that articulates in detail the use of these resources in keeping with the intent of the donor (when such intent is expressed by the donor). Such a plan will be developed by PACC staff with the input of the Advisory Committee, and should be submitted to the County Administrator for approval prior to implementation.

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**Conclusion**

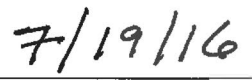
It is critical that we continue to encourage and facilitate philanthropic giving to PACC that supplements government funded services. By doing so, we can continue to meet community and jurisdictional partners' expectations for the provision of modern humane animal control and welfare, and to do so in a way that is fiscally responsible.

JKL/cbc

c: Tom Burke, Deputy County Administrator for Administration  
Dr. Francisco Garcia, Director, Pima County Health Department  
Keith Dommer, Director, Finance & Risk Management  
Paula Perrera, Deputy County Attorney  
Justin Gallick, Director of Community Engagement, Pima Animal Care Center  
Jose Ocano, Director of Operations, Pima Animal Care Center  
Pima County Board of Health  
Pima Animal Care Center Partners  
Friends of Pima Animal Care Center

Approved                       Not Approved

  
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C.H. Huckelberry  
County Administrator

  
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Date