

RB Fire station 33 Advisory Meeting

Rancho Bernardo Branch Library

Friday, 27 April 2007

Call to order at 9:35 AM.

In attendance:

Patti Perna – RB Community Council, FS 33 Renovation Project
Joe Perna – RB Library Tax Advisor for Fundraiser & Endowment
Robin Kaufman – RB Community Council president, FS33 Renovation Project (steering committee chair)
Daniel Weinberg – Director of Major Gifts & Philanthropy Planning, City of San Diego
Jenny Wolff – Development Director, Corporate Partnership Program, City of San Diego
Dave Olivet – Webb Park fundraiser
Sheila Mahon – RB Library Fundraiser
Diane Peters – Fire Station 33 Renovation Project (fundraising committee chair)

After introductions, Patti Perna opened the meeting with a comparison of the Fire Station 33 renovation and expansion project to two other successful past projects in RB:

- RB Branch Library – Fundraising committee (chair, Sheila Mahon) raised \$1M via a variety of fundraising methods, which included four direct mailings and wine & cheese events; with the State contributing \$5M to finish the project.
- Webb Park – Committee (chair, Dave Olivet) raised \$120K in one year, primarily by a mass mailing to 15K RB households (92127/128 zips), which resulted in an uncommon 8-12% response rate. Dave Olivet added that there was a lot of community interest in the Webb Park project, as no one wanted to see the lake drained. However, it was “tricky” to solicit public funds for privately owned property. Of the 36 businesses that border the park, only six contributed.

Corporate Partnerships: Jenny Wolff, who has a background in fundraising, as well as marketing, helped raise funds to purchase and operate the City’s fire and rescue helicopter program after the fires of 2003. She stressed the importance of everyone involved in such projects to be referring to the same information, such as our SOW, or at least a 1-page plan, to send out to people whose support we are seeking, even key media contacts. She then discussed a six-point plan targeted to the FS 33 Renovation Project.

1. Community Outreach: Inform, educate and involve the citizens of the community via the media, events like street fairs (RB Alive), schools, and so on. Crucial to have a good, working relationship with newspapers for publicity.
2. Identify Companies: Develop and use Chamber contacts to identify businesses within the community. Look into their corporate giving programs, employee-contribution matching policies, etc. She also advised that we not “stop at the (RB) border” when contacting corporations.
3. Motivation to Give: Have a recognition plan to offer contributors of all levels. Recognition on website, newsletter, event banners, public acknowledgment, and permanent markers, such as plaques and engraved pavers, for example. Research the giving goals and habits of the company, Daniel added; if your goals are in line with theirs, you have a good “in”.
4. The Ask: Money, in-kind (goods or services) or both? What type of contribution you ask for depends on the type of business. Some, such as Home Depot, like to have their employees donate hands-on time to the project, such as painting. “Also, don’t ask for a specific amount or a specific type of donation initially, but rather do your research before you go in to talk, and then ask how they envision this kind of partnership working for both the company and the campaign. And whomever is discussing this with the company should have at least 2-3 or more ideas ready to offer as both counterparts to something that the campaign isn’t interested in acquiring and to a lack of idea(s) on the part of the company.”
5. Timeframe/Process: This depends on the person you are talking to. Set deadlines for them if they do not. Some businesses have a process or deadlines for corporate giving, with which we would have to work. So, allow time for corporate approval and internal processes, which may take up to 6 months. Offer “exclusivity” at a certain level. Ask them if there are other companies they want to be associated with that you could contact, as

well. Sheila said they got \$87K in computers from HP for the library, making HP the exclusive technology contributors on the project. Weigh out the project needs with benefit to the business.

6. Recognition Plan: Discuss this in a brainstorming session. In regard to public safety and government property, recognition is rather tricky and will require creativity. Daniel suggested that the fundraising committee meet with the marketing committee to work out a recognition strategy and menu.

Jenny had to leave for another meeting at 10:30 am. Daniel said that anything we brought up regarding corporate partnerships, he would refer to Jenny.

One Time Fee:

- Patti Perna introduced this agenda topic by referring to an informal poll she conducted on a group of 20 RB residents, of whom about 35% said they would support a one-time tax levy of \$50 to fund the Fire Station project. She averred that a levy would not require fundraising funds, nor burn out the fundraisers. She suggested that the City should “eat” the cost of balloting.
- Daniel Weinberg, an advisor to the FS 33 project from the beginning, addressed the topic of a “one time fee” plan for raising funds. However, he recommended the use of a “campaign” rather than a “tax levy” as a means to fund the expansion and renovation. A 50-buck campaign, for example, would involve asking residents for a recommended donation of \$50 per household, relying on either PR to spread the word or a direct mailer, and combining it with other fundraising devices. But he could not endorse a tax levy plan. Experienced fundraisers, Sheila Mahon and Dave Olivet both echoed this opinion. The balloting process is complex and expensive. And if the motion does not pass, the project is left at square one.

Philanthropy/Fundraising Advice: Daniel Weinberg.

- The three main issues of our campaign: safety, security and a higher level of service.
- Events are good barometers of community support, and the cause must be *personalized*. Successful fundraising is not accomplished by any one device.
- We need City involvement.
- Must have a short answer ready to give to people who ask why we are doing this.
- There are two types of donations: community based and special opportunities, such as wealthy individuals and corporations.

Q&A and Ideas Exchange:

- Sheila cautioned us not to count on big donations from seemingly well-to-do residents.
- The main objection we must overcome in our campaign: Why do we need \$1M for FS 33, if we already own the land and building? The scope of work is very close or equal to a million now, but we are hoping to have a reserve for maintenance.
- If someone offers to set up an endowment, Dan recommended we “jump on it”, while Sheila cautioned us to be careful how endowments are set up, so that checks are written to the correct organization. Dan said the City has “boiler plate” documents to ensure this process. The role of key depositors is talking to other potential donors. He also indicated that individuals, who offer to make a provision in their Will or Trust to benefit the station, should be “warmly welcomed and provided the explanation that upon the implementation of the donation, the donor or donor’s family will be afforded proper recognition.
- Dan emphasized that key depositors at banks and key investors at securities brokerage firms should be recruited by the campaign and asked both to make a donation – themselves—and to exercise strong influence on the banks and brokerages to become significant donors. Furthermore, he offered to facilitate a meeting with our marketing committee and Jim Abbott, preferably at his office downtown.
- The San Diego Foundation has a large compendium of grant and funding sources, which Dan suggests we go through at their office.

Adjourned 10:45 PM.

Respectfully submitted by Diane Peters.