

Capital Campaigns for zoos and aquariums: seven mistakes to avoid

4th International Conference on Zoo Marketing and Public Relations

Hosted by Budapest Zoo and Botanic Gardens

8. - 10. May 2003

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Abstract

A critique of the classic capital fundraising campaign in terms of seven major common errors often encountered. The presentation is set in the context of the needs of major zoos, aquaria and similar institutions. It culminates in the contention that the overall organisational benefits of a campaign exercise eventually far outweigh its original stimulus of a specific funding need.

Introduction

What I am talking about and, three things, alas, that I am not talking about.

Ladies and Gentleman, I am going to take fifteen minutes of your time to discuss some aspects of the traditional capital fundraising campaign. This might be to raise money for a new exhibit, or for an overseas conservation project, or any substantial piece of capital spent. I will refer throughout to non-profit organisations, or 'charities' but under certain conditions most of the following can be applied to 'profit distributing' organisations, provided that the specific project in question is of an ethical nature, and does not directly benefit individual or corporate interests. But, before I do, I want to mention three important matters that I cannot dwell on, rather to my frustration, as they pose huge financial opportunities for many of the organisations in this room.

Firstly, I am not, at any length, able to lay before you the attractions of 'a legacy marketing campaign'. A great shame, as I am convinced that this is a great, largely unexplored, financial frontier for zoos and aquaria.

Why? Well, first of all, everyone dies. Later in this presentation I will tell you that, relatively, you are the 'poor folk'. That is to say, on the whole, while you (or your supporters) are alive, you cannot afford to make a really substantial, meaningful gift. The only big gift opportunity nearly everyone represents is the bequest in their estate. To divulge something of a professional secret, the main reason that so many large or international charities cultivate their donors so assiduously throughout an entire lifetime is not to get the 10 Euros a month on Direct Debit, it is to get your house when you die. Furthermore, zoos often represent something of great emotional value in people's lives. The regular visit may be tied up with strong family or other landmark memories (*'you never know whom you touch'*).

I am of course aware that all the many legal systems and cultural traditions represented in this room are very different, but the possibility of legacy giving is a constant. I would urge all the organisations here to review their overall communications strategy with a view to integrating a full programme of legacy promotion.

Secondly, I want to make it clear that my presentation is by and large, about 'philanthropy' and not about the area of 'commercial sponsorship'. There is a good deal of confusion here. Sponsorship is a marketing activity - purchasing association with some positive theme or project, and buying access to a defined audience. So in the sponsorship context, you need to see your zoo as a 'medium of communication' as well as 'a good cause'. Furthermore, the sponsorship fee may have no relationship at all to the project costs. So sponsorship, in practical, legal and fiscal terms, has nothing to do with philanthropy.

I cannot resist teasing you a little, and contradicting myself slightly, by saying that, in my experience, most big sponsorships do, motivationally have an element of philanthropy within them. But such a paradox is a subject for another day...!

Finally, I am 'not' talking to you about PHARE

PHARE Funds are European Union monies available as capital investment funds for the individual countries of the former 'Eastern Block', central and eastern Europe (= the 'accession nations'). It is about assisting each potential new member to reform its post-Soviet institutions in preparation for entry into the EU, moving organisations towards a liberal market economy overall - with additional benefits such as social democracy, social inclusion, improved governance etc.

Each country has a national PHARE allocation agreed between its Government and the EU. This allocation defines priorities as to how the PHARE Funds will be allocated and spent, and tends to reflect the big issues in the EU, which naturally include the huge economic importance of tourism. As a specific example, the Ministry of Culture in Bulgaria has (is about to have) a PHARE Funded allocation agreed for the promotion of cultural tourism. Such an allocation could for instance finance the reform of Zoos, Aquaria and wildlife parks in as tourist destinations.

So, given I am speaking in Central Europe, I thought it only dutiful to flag up this opportunity. A UK colleague of mine, Keith Hackett is something of an expert in this area, and should anyone wish to know more about PHARE, I would be only too happy to put you in touch with him.

I am going to talk to you about one specific fundraising strategy - The Capital Campaign, which I define as a TIME LIMITED, PRO-ACTIVELY PLANNED & IMPLEMENTED set of INTEGRATED activities to achieve A SPECIFIC FINANCIAL TARGET for a SPECIFIC project. As we only have a restricted time, I will treat this through an exploration of 7 major mistakes to avoid. Then, I will finish with one over-riding point, the REAL reason any organisation should consider running a capital campaign, a reason which has got nothing to do with raising money for a specific project, a reason, whose logic will completely contradict everything else I am about to say to you, a reason goes to the core of your organisation's long term overall strategy.

This will be by far the most important idea I will offer you today.

'The seven deadly sins'

1. Not *really* understanding the commitment
2. Failing to draw down the help of 'the gods'
3. Trying to raise money from 'poor' folk
4. Not putting yourself in the donor's shoes
5. *Not doing your homework*
6. Failing to marinate properly (*'how to make the perfect pickle'*)
7. Failing to properly articulate your cause

First deadly sin: not really understanding the commitment involved

Ladies and gentlemen, you cannot be 'a little bit pregnant'. A fundraising campaign is a major commitment - you cannot try it 'a little bit', you cannot 'dabble' or 'experiment'.

And this is rather a shame, and somewhat counter-intuitive, as the very natural response when confronted with a new and unknown area of activity is to 'dip a toe in the water' before committing.

But, unfortunately, as the word 'campaign' itself suggests, this must be a complex and carefully planned exercise. Your organisation must engage wholeheartedly, or not at all. And the proper choice in your situation, upon careful consideration, may well be 'not at all'.

So what are the kinds of commitments you need to make beforehand?

Well the bad news is you need to commit *money*. There is a fundamental problem here: to raise money you need to already have money. As a general rule of thumb, whatever target you set yourself (- an entire science in itself), you should budget to spend 10 % on 'fund raising costs'. This can pose a major difficulty, because donors want to feel 100% of their gift is going to the cause in hand and not 'administration'.

The slightly better news is that Zoos and Aquaria are in perhaps a fortunate position compared to other types of institutions. Your organisations are not primarily or traditionally fund raising organisations and thus you have an existing, 'disposable' revenue stream from the gate. So, if the success of your gate

does allow the budget, you can at least say to your donors that 100 % of funds raised goes to your project.

You must also commit *time*: time to prepare your case, time to cultivate your donor base, time to plan an integrated set of activities, and time to implement them. One day spent in planning on average saves 4 days in implementation.

And you must commit to getting *the right people*. People are of course part of the above fund raising costs, but it is also important to take a very sober attitude to getting the right skills. As I hope this audience will appreciate, there is actually a degree of technique here. Fundraising is not something *just anyone* can do. It does not simply require a pretty face and a charming personality. This is potentially very important stuff with enormous financial and therefore organisational development advantages.

You would not trust the electrical wiring of your house, or a medical operation on your child, to someone who has never done it before. Nor should you trust the task of raising millions of dollars to someone who has never done it before.

And just before leaving this point (Picture of Paul Burrell), here is an example of choosing the wrong person: Someone who lost his job in tragic circumstances, had a nice smile, perfect manners, brilliant at cutlery, and so the trustees of what was at one point the largest grant making charity on Earth, (the Princess of Wales Memorial Trust), made him Head of Fund Raising.

It did not work out well...

Second deadly sin: failing to draw down the help of the gods (or 'the sin or organisational arrogance')

Okay, you have made the resource commitments internally, but there is something else you need: No matter how well endowed with talent your organisation may be, no matter how much you can accomplish with your internal resources, you are unlikely to take your organisation to 'fundraising light speed' if you do not win external championship at the very highest level.

Much of what I do on behalf of my various client organisations is basically just 'hero hunting', finding mechanisms to draw down the influence and good will of figures with enormous influence, talent and other gifts.

What kind of people am I talking about? What is a 'hero'?

Well, they are the leaders of the community relevant to your organisation, politicians, businessmen, perhaps also people in the public eye, celebrities.

You wish to achieve something very difficult, attain perhaps a multi-million dollar or euro goal. The truth is, irrespective of political structure or social climate, in *any* society it is generally only the rich, powerful and influential who can make difficult things happen.

Why should a hero help you? There are lots of reasons:

- Because you have a compelling cause
- Because your organisation is an essential part of the community they lead
- Because many people at the top feel a duty to put something back
- Because some people want to show they have arrived at the top

And a whole host of other reasons connected to that fascinating set of motivations sometimes lumped together under the expression 'Ego-Altruism'

What is the help they can give?

Well, quite simply they can, of course, give you money. But we have not, necessarily, quite got there yet ('ask for something easy first - to create momentum in the direction you require, then ask for the more difficult thing').

Heroes can provide you with:

- power or influence (*subtly different things*)
- social and personal access to those who have funds

- unparalleled intelligence on who has what, who gives it to what, what motivates whom, who likes whom and so on
- talent and experience at level you could not possibly afford to hire
- and finally, and most importantly, they can provide 'asking power'. In order to ask for funds off the wealthy and powerful, you have to have the wealthy and power-ful in your corner

The great barrier to all of this is of course the innate conservatism of all successful organisations and their leaders. It is too easy to fall back on the defensive and say that we already have all the talent and influence we could possibly want at home. And we may well have a very impressive internal human resource, but for the purposes of this extraordinary and *temporary* special push, it is vital that you solicit the free help of the super rich, the super influential and the super talented,

They are, after all, only waiting to be asked. At least, *if* you know the right way to do so...!

Third deadly sin: trying to raise money from 'poor' people

This is a subject that gets me a little 'aerated', because throughout the long, sad, scarred years, and even now, I hear of fundraising 'mantras' such as:

- *if everyone gives a little* (...they won't)
- *it all adds up* (.....but if it is doesn't add up to a useable sum of money, you have failed)
- *every little helps* (.....no it doesn't, not really - it is the big stuff that helps)

Let me let you into a secret: Rich people (and rich organisations) have a lot more money than poor people (i.e. 'all the non-rich people').

Why am I stating the blindingly obvious? Because, in this context, the 'blindingly obvious' is usually ignored. It is especially hard to understand why fundraisers persist in devoting time and energy to fundraising from children.

BECAUSE CHILDREN DO NOT HAVE ANY MONEY!!!!!!

Some statistics to put all this in context:

- 250 people on Earth control 45% of all the wealth in the world
- In 2002, 50% of all the giving in the UK came from just 3% of the population

Fundraising is a practical exercise to achieve an agreed economic goal in pursuit of an ethical end: it is not an exercise in democratic inclusion.

It is easier to raise one million pounds off one person, than it is to raise one pound off one million people. Wasting your resources and those of others in ineffectually and self indulgently pursuing the 'shrapnel' is not just professional incompetence. Given that your task is in support of a pressing ethical need in the first place, it is also immoral.

Well, I did tell you this one got me wound up.

There are of course organisations that are good at raising a little bit of money from vast numbers of people. But they are called Coca Cola, or the Mafia, or the Taxman, or the Catholic Church, etc. You will never develop the vast marketing machines they have access to.

I will finish this point with a reference to a famous episode in the history of American crime and Public Enemy Number One: John Dillinger.

John Dillinger, who liked to

- rob banks,
- kill people
- go to the films
- and do radio interviews

In his very last radio interview, before he was cut down in a hail of FBI bullets emerging from a cinema, the courageous journalist asked Dillinger a famous question:

'Mr Dillinger, why do you rob banks?'

He received an even more famous answer:

'Because that is where the money is'.

So focus all of your finite resources on where the money is - not where it isn't.

Fourth deadly sin: not putting yourself in the donor's shoes

Ladies and gentlemen, it is NOT about what you want - it is about what THEY want, they being the potential donor.

People who work in zoos and wildlife conservation are rightly passionate about their work. But there is always a temptation to be so wrapped up in your own organisation's work and a particular cause that all you can do is spill over with enthusiasm as to how important it is, and you omit to consider what motivates your audience.

It is an ancient marketing truism that you can only move your product if you know what makes your consumer 'tick', what their motivation to purchase is. In our context your 'product' is the opportunity to give. So why do people give away their money?

There is a huge spectrum of motivations as to why people do this seemingly bizarre thing, offer their hard-earned wealth to some form of 'good cause' without any tangible return or apparent benefit. It is not possible to properly explore this area here. My purpose is rather to give a sense of the spread of motivators, and to underline the need to enter the mind of the donor.

Here are a couple of illustrative references from *opposite* ends of the spectrum.

Some years ago the mother of a friend of mine, Jane, was diagnosed with a terminal illness, and was taken into a local hospice (for the non UK audience: the hospice movement is all about concentrating all resources on making someone's final days as agreeable as possible and avoiding pain, distress and loss of dignity as much as possible).

And Jane was quite amazed at the degree of care at all levels and of all sorts that was on offer.

In due course her mother died, having experienced very little pain and *no* anguish, and after it was all over Jane made the biggest charitable gift she had ever made and probably ever *will* make. It was far more than she could 'afford' (whatever that rather interesting word 'afford' means). It was what US theorists call '*a sacrificial gift*', the gift that *needs* to hurt.

My question to you, is what was the fundamental motivation for Jane's gift?

Was it gratitude to the Hospice for their work? No - or, at least, only in minor part.

Was it to ensure that the Hospice's work continued for the benefit of others? Not solely.

No, the compelling reason that Jane made the biggest gift she ever will make, was as a means of *expressing her love for the mother she has lost*.

Frankly, I know there was another, even more intimate and profound emotional driver. For Jane has always been terrified in the back of her mind of the act of dying (both for others, but especially for herself). The experience had shown her that dying did not have to be 'that bad'. So her gift was also an expression of existential relief.

So the giving motivation may be tied to the most profound and intimate of emotions. Let us now go to other end of the spectrum, and I will tell you about the Potlatch Indians: This is a Native American culture of North West US and Canada, which used to conduct ceremonies that lasted several days long. These potlatch ceremonies involved the richer and more powerful members of the tribe making a ritual show of gift giving to the poorer members. They would also ritually destroy wealth, pouring hard won cooking oil onto the earth and destroying blankets and jewellery. In both cases, the giving and the wasting were there to show that they could afford do so. By giving in a certain way to the poor, they were reaffirming their social control .

The biblical episode of Solomon and the Queen of Sheba is essentially the same. Before they actually meet, the two potentates send each other competitively embarrassingly luxurious caravans of riches, trying to excel each other in grandeur.

So the mainspring of gift can be anything from the deepest movement of private feeling to an

institutionalised system of social control and structure, and there are countless other sets of motivation:

- to please the person who is asking
- to repay a social or moral debt
- to win immortality
- to become part of something bigger than yourself
- to get rid of the nuisance of the asker

... and I would not even have touched on the whole issue of sponsorship - not a gift - the sponsor purchases the right to be associated with something positive - an alternative to buying advertising space, involving a wholly other set of *commercial* motivations.

And finally, in all of this, I am not remotely dismissing the possibility that many people give to a cause because they actually believe in that cause, and simply want to further that project. But there is always an exchange, a 'pay back', however intangible, to be aware of, even if it is only the requirement to say 'thank you' properly.

A well structured campaign, then, critically involves putting yourself in their shoes, and adopting the transitional stance - looking back at yourself from the donor's perspective.

Fifth deadly sin: not doing your homework

You cannot enter the campaign process in a vacuum of information. We have just dealt with analysing the *motivation* of your potential supporters, but you also need to know *who* they are, *where* they are, *who* knows them, and *what their appropriate giving level* is.

- If it is a company, you will want to know its size, its decision making structure, its track record in donations and the size of its relevant budget (marketing? community support? or another?).
- If it is an individual, their ability to give, their social circle, their interests, etc.
- If it is a grant making trust, its general terms of reference, the size and nature of typical grant, and, of course, the list of trustees.

And all of the above is just a beginning. There will be other types of information peculiar to your situation.

So how to get such background? Well, in addition to the 'intelligence providing heroes' aforementioned, there are too many different avenues of published information and too many techniques to mention in a short time, so I am going to take a short cut and refer you to the publication of a colleague of mine: '*International Prospect Research*' by Vanessa Hack (details in bibliography). Before leaving this principle, the gathering of intelligence, two final points:

- Do research carefully who is *already* giving to your organisation and who may have given *in the past*. The first law of any marketing drive is, before you try and open up new markets, find out who is already buying whatever you sell and more intensively mine this market. You may find gold dust in the history books.

- And finally, remember we are talking about '*information*', NOT '*data*'. '*Information*' is something that you can actually use; '*data*' is often something that just makes you feel good about yourself.

Sixth deadly sin: failing to marinate properly (or 'How to make a Pickle')

The giving process is one of 'outsiders' gradually becoming 'insiders', of people becoming donors 'when the time is right', after a *gradual* process of *mutual* courtship. This applies more to the potential individual giver, than to corporate, trust or government sources, but, even there, we are in the end dealing with that peculiar, emotional, irrational, relationship-seeking, primate, *Homo sapiens*.

So you have to 'friend raise' before you fund raise. The 'sin' is to impatiently rush to bluntly invite financial contribution before the time is right, and before your potential donor has given you the right signals (there is of course a 'converse sin' - leaving it too late, or indeed, failing to ask at all - another topic for another day).

The rather distasteful word 'cultivation' is used for a set of activities that gradually bring friends,

supporters and potential donors into your organisation's orbit.

The process will probably involve special events (NB not actual fundraising events) that will invite appropriate outsiders to help celebrate your organisation's achievements, and to get to know more about your work and some of your representatives. This might involve a series of lunches, or you might use your organisation's major celebrations (opening of an exhibit or receiving an award) as opportunities to show your work to community leaders.

To provide some kind of perspective on this process, if a Chief Executive or Head of Development were to meet 2 new individuals every week over 2 years (= 200 people), that organisation is likely to find a pretty receptive business, philanthropic and decision making community when it launches the campaign thereafter.

It is important to recognise that such 'getting to know you' activities are also acting almost as a focus group. Your organisation should be receptive of guests' reactions to your project. This is a continuous process of melding, and adding value to, your plans, whilst creating external advocates.

Taking a strong presence at some external business organisation event can also be useful. Brian Child, formerly of McCann Erickson, will run a workshop later today on '*who is not coming to your zoo?*' Well, one constituency that is probably not coming very much are the busy, business and political decision makers. Sometimes you need to go to *them*.

The ideal end result we are seeking from this 'marination' process is to ultimately dissolve the distinction between those who are official representatives of your organisation and those who are 'only' its external friends and informal advisers.

One US colleague, Kay Springel Grace, uses the expression '*Get them into the kitchen*'. The reference being that in a traditional home, it is only old friends with whom you are most comfortable that get invited into the most used, and perhaps therefore not best decorated, part of the house. So endeavour to gradually move your supporters from the 'Sunday Best Parlour' into the 'Back Pantry'.

When your external audience starts using the word 'we', you are half way there. Your fundraising needs will have ceased to be wholly 'your problem' to be presented to the outside world, and will become a *shared* opportunity to be addressed by your entire constituency.

Before moving on, I want to dispel any notion that there is anything surreptitious, Machiavellian or deceitful in such a process, rather the reverse.

To revert to zoological metaphor, this is a 'courtship process' and you, as the instigator, are merely creating the right 'arena', a safe and comfortable zone to allow *both* parties to get to know one another, to eventually choose to engage more fully in a particular project, *or* perhaps (on the part of organisation as well as the potential supporter) to choose not to, and to walk away.

Seventh deadly sin: failing to communicate your case well

At some point in planning your campaign you will have to make a general articulation of your case. You be required to state in written, and probably also spoken, form why anyone should give you any money.

In making your case, there are pitfalls, rules, and 'tricks of the trade'.

Here is a simple example of someone transforming 'a fundraising case' from the mundane to the excellent through a simple stroke. A few years ago, a friend of mine went to work in one of the most beautiful cities in the world, Paris. His apartment was on the far side of a small park from his office, and he enjoyed walking over the grass, through the trees and admiring the ducks on the pond, and so on, on his way to, and from, work.

One day, on a particularly fine April morning the birds were singing and the trees were in bud, and as my friend walks across the park, he sees a blind beggar sitting on the grass. The beggar has a slate with the words '*I am blind*' with his cap besides, and there are a few coins within - but only *very* few.

So my friend reaches down, picks up the chalk and adds just four words beneath '*I am blind*', and continues on his way.

When he returns that evening, low and behold, the blind beggar's cap is overflowing with money.

So what were the four words?

'I am blind... and it is spring'

There are three reasons why this message worked. First, it is very *simple* and *direct*. The good persuader does not surrender to the temptation to belabour his audience with ten reasons why you should give. If I have a hundred reasons why you should support my position, my cause, I should JUST USE THREE.

WHY... ?

- Because some of the reasons will be weak relative to others, and some of your listeners will invariably focus in on the weakest link in the chain

- Because it sounds desperate, and needy. Someone who is confident of their case does not *need* to overstate the case

- Because it is wise to always keep something in reserve

- Because it is *boring* for the other person to listen to you go on and on and on

(Please note that I could not resist providing 4 reasons why you should only ever provide 3 reasons)

The second virtue of *'...and it is spring'* is that it is highly EMOTIVE. In the field of giving (even more so than in *every other* field) people think with their heart first. A more logical or clinical response, the positioning or application of that initial emotional impulse only comes *later*.

The third virtue is that it puts the need IN CONTEXT.

When does blindness most matter? When the visual world is at its apogee (e.g. in spring in a park in one of the most visually romantic places on Earth).

An example closer to home..?

'The Asian Elephant will be functionally extinct in 50 years' - a reasonably arresting statement, but....

'The Asian Elephant will be functionally extinct ... in one short human lifetime'

or...

....within the lifetime of our children'

or

'The Asian Elephant will be functionally extinct in just 50 years, and has been around for XXXX million years'

and so on

SIMPLE, EMOTIVE and SET IN AN ARRESTING CON-TEXT - just three example of the importance of presenting your case meaningfully.

'The Big Secret'

Why I don't *really* believe in fundraising anymore, and the real reason you should mount a campaign

And now the important bit, the bit that in some sense sub-verts the importance of all the foregoing. If you want to take just one point home - this is it. You can 'throw away' the rest.

The real point behind mounting a strategic fundraising campaign is NOT to raise the money or to complete the given project.

Let us recap that a capital campaign involves:

- Making a fully resourced commitment to the outside world.

- Seeing your organisation as external decision makers see it, not as you see it.
- Hunting external 'heroes' at the highest level.
- Turning outsiders into insiders.

The real legacy of doing all this is to *radically, permanently* and *profoundly* change your organisation, to turn it 'inside out'.

Columbus set sail on a well resourced quest to find a new passage to *India*. But he didn't. Instead, he found the ultimately much greater prize of *America*.

And there are many examples of *apparent* serendipity which ultimately all really derive from the networking and influ-ence winning process kick-started by the Elephant Campaign at Chester Zoo.

The Campaign has dramatically repositioned Chester Zoo in the awareness of those political and business decision makers who matter. Because so many of them now see the organisation as 'theirs', an asset integral to the well being of our region of the UK - whereas formerly it probably only represented a pleasant but unserious recreational proposition only ever vaguely present at the back of the mind.

BUT if all these benefits are there as a result of essentially 'blue-sky' networking, why does one need the vehicle of 'a fundraising campaign' in the first place? Why not simply set up a programme straight off dedicated to meeting, talking to, and gradually involving external decision makers?

Well...

Firstly, if you want to talk to people, you need something to talk *meaningfully about*. Something to ask advice on, an exciting something to offer involvement in.

Secondly, a networking and profile raising programme will cost quite a lot of money, It is hard to imagine a Chief Executive approving, say a 100,000 Euro budget just so someone can 'go and see *what is out there*' (if Columbus has asked Ferdinand and Isabella to finance three ships just so he could go and see if there was anything in the middle of the Atlantic, he would have got short shrift).

And thirdly, you don't need to! You can have your Okapi exhibit, or new education centre, or outreach project in East Africa or whatever is the goal of your campaign *and* all the far greater benefits of gaining influence through the campaign exploration.

I am going to conclude my presentation by approaching this same essential point from another direction.

I may have seemed to have been talking to you about of 'fundraising' which was certainly my original core skill, *but I do not actually 'believe' in fundraising anymore.*

Well... okay, perhaps I do, but I have come to think of fund-raising in isolation as ultimately a limited, outmoded and impoverished activity based on short term philosophy.

No, what I believe in is 'Development' - all the things I have been talking about, *and* many other techniques, to turn your organisation 'inside out'.

Fundraising is a tactical activity to solve a localised problem. Development and 'influence structuring' is a strategic philosophy to win ever higher levels of recognition for your organisation and its ambitions. As such it must be an integral part of your overall organisational strategy.

Indeed, in so far as your organisation will require the support of the external world to move towards its desired future, one might well argue that the 'Development philosophy' should BE your organisation's overall strategy,

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