

**A G E N D A**

**JAMES CITY COUNTY BOARD OF SUPERVISORS**

**WORK SESSION**

**County Government Center Board Room**

**February 24, 2004**

**4:00 P.M.**

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- A. CALL TO ORDER**
  - B. ROLL CALL**
  - C. BOARD DISCUSSION**
    - 1. Heritage Humane Society
  - D. ADJOURNMENT**

022404bsws.age



February 16, 2004

To: Mr. Sanford B. Wanner, County Administrator  
From: Pam Johnson, HHS Board of Directors, Facilities Committee Chair

Re: Please find enclosed our pre-presentation package to include four attachments:

- Public/Private Partnership for a new Facility
- Uses of Buildings
- Ratio of Residents to Square Footage
- Scope of Services

Toward that end you will find a Fundraising Counsel for Non-Profit Organizations provided by E.L. Freeman, CFRE. Thank you for your time and efforts and we look forward to working with you in the future.

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IN THE SPIRIT OF CARING

430 Waller Mill Road • Williamsburg • Virginia • 23185  
Tel: 757.221.0150 • Fax: 757.221.0361 • Website: [www.HeritageHumaneSociety.org](http://www.HeritageHumaneSociety.org)



## THE HERITAGE HUMANE SOCIETY (HHS)

PUBLIC/PRIVATE PARTNERSHIP FOR A NEW FACILITY

### A. Quick Facts about HHS

- IRS 501[c], nonprofit, volunteer-driven organization
- More than 1300 local private and business members
- Strives for maximum adoption of animals in its care and educates the public about humane treatment of animals
- Operates with a mix of private/public funds, statements of which are audited annually and certified by Hoover, Daughtrey & Haag, CPA, a member of the American Institute of Certified Public Accountants. (Latest audit, for 2002, has been provided.)
- Revenues and operating expenses for the year ending 12/31/03 have been provided. By soliciting its generous membership and engaging the general public in fund-raising events, HHS has enjoyed surpluses during the recent recession, while providing more benefits to the public and to the animals in its care.

### B. What HHS Provides Residents of James City County: HHS & JCC/ACF Interdependence

**I. Animal Control Services:** James City County Animal Control (JCC/AC) is usually closed on weekends. Police dispatchers mention HHS, which is open on weekends, as the place residents can take stray canines. During the week, when the animal control officers are on the road and not available to answer the phone, the HHS phone number is given on the taped message. In 2003, 112 stray canines were brought to HHS by residents of James City County (JCC) and Williamsburg which contracts with JCC for animal control; many, perhaps most were taken to HHS because of this close connection. This is in addition to the hundreds of dogs brought to HHS by their JCC owners. (See below, II.)

*Please note: In the early 1990s, the current animal shelter, then owned by the SPCA, was closed. Stray dogs multiplied and dog packs formed. The number of dogs picked up by JCC/AC rose every year, from 416 in 1990 to a high of 1,179 in 1996. Residents complained in the newspapers and to their local representatives that they could not walk safely in their neighborhoods or let their children play outside. Although other factors might have entered in, there is surely a correlation between the closure of the shelter and the appearance of the dog packs. Once the dog packs were controlled and the shelter reopened under the auspices of HHS, the number of canines JCC/ACF impounded annually steadily declined, to 405 in 2003. Concurrently, the shelter's JCC*

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*canine intake rose. In 2003, HHS accepted 462 canines from residents of JCC and from JCC/AC.*

**II. Supplementary Animal Control Services:** While it is the legal obligation of the county to accept **all** unwanted canines, realistically HHS is the only facility in the area where residents can take their own unwanted animals. This prevents these animals from being abandoned in woods, neighborhoods and along roads, becoming a problem for JCC/AC. In 2003, in addition to the 112 stray canines brought in by residents, HHS accepted 260 canines owned by James City residents, 43 owned by Williamsburg residents. Private funding significantly subsidizes the care of these animals.

- **Animal Control adoption:** provides Williamsburg/James City County with kennel space for adoptable canines after their legal stay at JCC/ACF (under an annual contract.) In 2003, HHS housed 94 canines brought from JCC/AC.
- **Feline Control:** In 2003, HHS accepted 902 cats and kittens from JCC residents and bore alone the considerable financial burden for this service. HHS is the only facility convenient to residents that accepts felines, including many stray and diseased feral cats that could otherwise pose a public health hazard, congregate around restaurants and tourist sites, and prey on wild life. HHS loans traps to area residents and usually must euthanize feral felines brought in; some feral kittens that are not diseased are rehabilitated for adoption. Stray cats brought in by area residents are frequently adoptable, but would revert to feral if left at large.
- **Curbing Population:** HHS is the only local organization dealing with the problem of excess companion animal population. It contracts with local veterinarians to spay or neuter every animal adopted from the shelter. It has also obtained grants and raised funds to underwrite spay/neuter programs for the pets of low-income residents of JCC/Williamsburg. HHS hopes to reconfigure its current intake/isolation wing to an on-site spay/neuter suite for adopted shelter animals.

**Summary of Services to JCC Constituents:** HHS provides services to JCC that no more distant private organization could duplicate. While JCC/ACF personnel meet residents only by appointment during the week and do not usually pick up stray dogs on weekends, HHS is conveniently located and has widely publicized business hours 7 days a week. HHS accepts stray canines brought in by county (and city) residents, as well as unwanted pets surrendered by residents. These services constitute a significant extension of JCC/AC, which is legally responsible for unwanted dogs.

Feline control is entirely the burden of HHS. This service must greatly reduce the number of 'bite and scratch' cases that Animal Control is legally mandated to quarantine; it also protects tourists and public health in general from rabies, hook- and roundworms and other serious diseases.

According to a memorandum on the JCC website, was HHS not available, JCC would have to build a facility that is large enough to house all the canines HHS accepts from JCC, *a total of 462 in 2003*. In other words, the number of canines impounded at the county facility could double. To care for the increased load, the website stated that a part-time kennel assistant would be necessary. Presumably, more officers would have to be hired to track down an increased number of strays, especially as the number of county residents grew. Annual salaries for AC officers begin at \$24, 451 and progress through grades to \$36,000. Additionally, they receive health and retirement benefits. The AC supervisor's salary is \$42,044, exclusive of benefits.

### **C. Challenges to HHS Continuing Its Services to JCC:**

- I. Physical deterioration:** The small, animal-housing building, built in 1971 by volunteers with donated materials, has deteriorated physically almost to the end of its useful life (see Feasibility Study, Part II, *Report to Local Government*.)
- II. Significant residential population growth:** Built for the area population of the 1970s, this building is inadequate not only for the greatly increased numbers of animals that have resulted from a 250% increase in area residents since that time, but for the resident population growth projected for 2015-2020. James City has by far the highest projected residential growth of the three jurisdictions to be served.
- III. Danger of closure:** Legislation enacted in 2000 specified heavy fines on public and private animal facilities that fail to meet strict health standards (i.e. fines up to \$1000 *per violation per day*). For example, fines could be incurred daily for failure to provide animals 12 air exchanges per hour and for failure to see that all areas that animals contact are constructed of impermeable materials, which is explained in Section E, below. (See Code of VA 3.1-796.96.2, appendix, *Report to Local Government*.)

### **D. What HHS proposes To Do:**

- I. Build a new facility that is:**
  - **10,000sf & expandable:** to provide for projected population needs until 2015-20, the new facility begins with approximately 10,000 sf, using a design that is the most cost-efficient to enlarge, if necessary.
  - **Complying and durable:** constructed to meet state regulations, and to last indefinitely.
- II. Build a new facility that will:**
  - **Offer full Animal Control service:** The facility will have sufficient kennel, isolation, and quarantine space to offer full Animal Control service. Sick, dangerous, and 'court-hold' animals could be accommodated. County Animal Control officers will thus be freed to concentrate on their pickup duties, thereby saving the cost of hiring

additional officers in the near future, as the population rapidly grows.

- **Offer more Animal Control supplement:** Offer the growing number of JCC residents enough space for the stray and unwanted pet animals they take to the shelter, thereby reducing the need for JCC/AC pickups in its service area. To prevent residents from simply turning out their animals or calling Animal Control for strays, it is important that there is a convenient, well run shelter as an alternative.
- **More feline control:** provide the growing number of area businesses and residents with trapping and spay/neuter for feline control, thereby preventing a serious health threat to the public, the tourist industry, and wildlife.

**E. Developing a New Facility:** There will be no formal architectural plans until 2004; meanwhile, a committee of the HHS board of directors has:

- I. **Visited complying facilities:** Many Virginia counties and cities have built to comply with the state mandate of 2000. Among these are Culpeper, funded 100% by public funds, and Alexandria, with a mix of public (85%) and private (15%) funds. See *Report to Local Government*, pp. 23, 24. (The new public Gloucester Animal Control facility is also discussed.) A facility for Roanoke and three adjacent counties (funded 70% publicly, 30% privately) was visited while under construction; it opened in February 2004.
- II. **Researched cost guidelines:** The committee, using national and local guidelines, found that in this locality, \$150/sf is a reasonable estimate for a structure that complies with state standards, which was confirmed by county officials in their estimate for a possible annex to the JCC/ACF. Frequent air exchanges and impermeable surfaces are legally mandated and expensive to achieve. However, impermeable surfaces such as resin impregnated/coated cement and acrylic/stainless steel/ glass caging will stand up to the extremely harsh cleaning required and last *indefinitely*.
- III. **Commissioned Site Studies and Obtained Rezoning and a 2-year SUP from York County, 8/03 to 8/05.**
- IV. **Interviewed Specialists:** HHS has determined that contracting with an architect who specializes in animal facilities is the most cost-effective way to meet state standards. Out of a list of a dozen, two specialists were chosen and interviewed at the site at no cost to HHS. Both indicated that they let construction bids competitively from a pool of local builders able to handle this kind of specialized construction. One of these has now been chosen, subject to HHS board approval; he will split his fee with a local architect, who will provide crucial daily construction oversight. 10% fees are standard in the industry. (See *Report to Local Government*, Part III, p. 28, line 24.)

V. **Function First:** In interviews with architects with broad national experience, HHS stressed that a functional, long-lasting building is wanted. Based on consultations with operators of new Virginia facilities designed by non-specialists, HHS has determined that many costly errors can be avoided by choosing an architect with specialty experience. (For example, the local architect for the Culpeper facility covered cement block with epoxy to achieve an impervious surface. Unfortunately, because of conditions of extreme moisture and harsh chemicals, the epoxy is separating from the block, which must now be sandblasted before epoxy can be reapplied. During this procedure, a facility must close for over 1 week, a serious consideration for Animal Control. The cycle will repeat as soon as the epoxy separates again. In contrast, the advanced impervious materials used in the Richmond SPCA are performing well.)

F. **Funding a New Facility**

I. **Public/Private Partnership:** Funding for the new facility is being sought as a public/private partnership. We are inviting an investment from the three jurisdictions that make use of the facility to cover the cost of space for those areas that are necessary in public facilities—animal housing and feeding/treatment/storage. Private funds will be solicited for building those portions of the facility that are not necessarily required in a public facility. HHS privately funded space includes administration, facilities for staff, public lobby for adoption and surrender of animals, additional storage, restrooms.

As major contributors will want to safeguard their investment, HHS is completely open to discussion of ownership, leasing, or other options for the new facility.

II. **8500sf publicly funded (maximum):** The space dedicated to animal housing/ feeding/treatment/storage (much legally mandated) is estimated at 8500sf, using a Humane Society of the U.S. formula. This space has not been refined by an architect.

III. **Totals:** Minimum cost of the space for animal housing/ treatment/feeding/storage (and grading/basic landscaping):  
**\$1,275,000** (8500sf x \$150sf); plus public/private sharing 50%-50% of:  
**63,750**(50% of architects' fee from jurisdictions)  
**63,750** (50% of contingency/licenses fees from jurisdictions)  
**32,500** (50% additional caging/equipment from jurisdictions)

**\$1,435,000 estimated total cost animal housing/treatment/etc.**

G. **Proportional Contributions:** HHS is requesting funding of this \$1,435,000 from the three jurisdictions that will make use of the facility. The sum suggested for each of the localities has been based on their proportion of current and projected usage. Based on the following percentages:

- **Highest User:** James City County, which has been conferring with HHS to co-locate a new Animal Control facility with an HHS shelter, would be

the largest user and will be asked to contribute 79.5% of the \$1,435,000 or \$1,140,825.

- **Next Highest User:** York County, as the second largest user, has been asked to contribute 12.5% of the \$1,435,000 or \$179,375. The HHS proposal to the supervisors' workshop on 2/10 was received favorably by several supervisors, one of whom wrote HHS to this effect.
- **Lowest User:** Williamsburg, projected to use the least space, will be asked to contribute 8% of the \$1,600,000 or \$114,800. This amount takes into consideration that the city intends to lease the land (4 acres for 30-40 years). The city has also taken under consideration the assumption of \$50,000 in site work to manage runoff away from the reservoir. Recently, City Councilman, Clyde Haulman, proposed additional funding for capital expenditure.

**H. Private Monies:** Concurrent with seeking public funding, the HHS board of directors is moving aggressively in launching a fund-raising campaign in the private sector to cover those costs that will devolve entirely on the society (\$500,000 to \$600,000, a portion of which has already been contributed) and to raise further monies for an endowment that would go toward supporting operating costs of a new facility. The board has already made a commitment to the fund-raising campaign planning process by retaining local fund-raising counsel to conduct a pre-campaign and assessment and to work with the board in positioning HHS for its campaign.

- **HHS Space 1500sf (minimum):** Private Monies will fund all those parts of the facility that are not directly connected with the space for animal housing and feeding/treatment/storage (and possibly some that are devoted to felines). Non-animal sections are estimated to cost between \$500,000 and \$600,000: \$225,000 for 1500sf x \$150, plus \$127,500 for 50% of architect/contingencies-fees for the publicly funded space, plus \$45,000 architect/contingency-licenses for HHS space, plus \$32,500 for 50% caging/equipment, plus \$100,000 for 100% of office equipment/ spay-neuter conversion. Any additional funds raised will be set aside for endowment, or needed space, such as space for felines.
- **Staff/Public areas:** These include intake and adoption lobby, administration, kitchenette/break room, mandated handicap-accessible restroom, staff lockers, and storage.
- **Fees and caging/equipment:** Private monies will also fund one-half of the architect/contingency-licenses fees and additional caging/equipment costs as stated above.
- **Equipment for HHS space:** HHS will fund 100% of furnishings for offices, public lobby, and kitchenette, as stated above. Donations in kind will be sought.



- **Spay/Neuter:** HHS will reconfigure the small (only felines, puppies) Spayth Building isolation ward to provide spay/neuter for adopted HHS animals. This procedure would be performed on *all* animals adopted out, including those that originated with Animal Control. The cost of this conversion plus the furnishings for HHS space as stated above is estimated at \$100,000 minimum. Grants will be sought to help fund spay/neuter.

**Conclusion:** Although the state law imposing fines for noncompliance is of recent origin, the regulations they are meant to enforce are not. However, the regulations have not previously applied to private shelters; the law of 2000 now holds small organizations such as HHS to the same standards as public facilities and specifies the same penalties for them. But while public facilities can upgrade or build with tax monies, small shelters face the daunting task of raising large sums at short notice.

HHS believes that the challenge can best be met by a private/public partnership to build a co-located facility. While HHS provides a public service, the legal responsibility for unwanted animals rests with government. Fairness would dictate that government bear the greatest share of building costs. HHS stands ready to do everything in its power to serve the people and pets of the county. Together, we can provide compassionate care for the abandoned and helpless animals of our fine community, protect its residents, and effect economy of scale. Let us continue the dialogue until we can arrive at an agreement to which we can all point with pride.

Attachments:

Uses of Buildings

Ratio of Residents to Square Footage of Proposed New Facility

Scope of Services



### Uses of Buildings, Feb. 2004

**Spayth Building with New Wing:** 1512 square feet on ground floor (2nd story, an additional 1512 square feet, unheated)

- A. Main Section - Current uses to continue: storage and volunteer/education
- B. Wing - Current use of 4-room suite to continue: occupation by animals, storage (overhead) and administration; when a new facility is built, part of this wing will be changed from Intake/Isolation to Spay/Neuter. The 4 rooms on the ground floor would become: surgery prep/pharmacy/O2 closet, surgery, recovery rooms, feline and canine, respectively.

**New Facility:** Total 14,000 square feet available for future expansion: Approximately 10,000 square feet to be built in the first stage, to service the growing areas of upper York County, Williamsburg, and James City County until approximately 2015-20. According to a formula provided by HSUS/ICMA, into which we have inserted local data for 2003, the **initial 10,000** square feet will consist of:

- A. Healthy dog housing, all indoor, which will require 52 runs for an *average* of 32 canines per day. This accommodates 1 dog or litter per run, with excess runs providing for residential growth, peak occupation, and quarantine\* totaling **3335sf**. (We have assumed a 15% growth in canine intake until approximately 2015-20 from upper York and James City County.)
- B. Healthy cat housing will require **1200-1350sf** for caging for an *average* of 46 felines per day. This accommodates 1 cat or litter per cage. Until the feral cat colonies are brought under control, the estimates need to remain broad. (We have assumed a 15% growth in feline intake until approximately 2015-20 from upper York, Williamsburg, and James City County. This is probably understated.)

*\*Note: Special facilities are required for animals held by Animal Control pending the outcomes of court cases in which they are involved. For example, because dogs (and possibly cats) in this category cannot be allowed to escape, an outdoor area (courtyard) directly connected to the facility that has impermeable flooring and 3-4' high walls topped with fencing may be required by law. This area might be sized from 300--700 square feet, depending on regulations. So-called 'court-hold' animals would occupy this exercise area one at a time. These animals might stay for a year..*

Additional space for animal housing and care, some of which is legally mandated, **4100-4300sf:**

- Small area for receiving/processing animal control animals

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- Isolation areas for sick canines from animal control and for strays brought in by residents; state mandated. State may mandate separate isolation for canines surrendered by owner. State mandates separate air exchange
- Isolation room for sick felines; state mandates separate air exchange
- “Court-case” areas designated for animals brought in by animal control that are involved in litigation (e.g. bite cases) must be separate from other animals to prevent disease, etc.
- 2 exam/treatment rooms, 1 each for canine/feline, with storage for medicines and medical equipment
- Room for euthanasia of animals.
- Room for disposal of euthanized animals (freezers)
- Room to bathe animals with laundry facility for towels and bedding
- Room to store and prepare food for animals
- Other storage such as space for evacuation cages, janitor closet, electrical closet, fire sprinkler closet, space for heating, A/C, air exchange, pressure pumps, etc.

Space associated mainly with Humane Society activities **(1500sf)**

- Administration: small offices for a Director and a Shelter Manager, office equipment room with work cubicles, staff meeting-break room/kitchenette and staff shower/lockers/toilets.
- Public Areas: a front-entrance lobby required for the public which will contain a counter for surrender of animals by owners who reside in the service area and for surrender of strays brought in by residents in addition to a counter for adoptions by the public and a (legally mandated) handicapped-accessible restroom.

Please note: These are estimates only, based on a formula published by the Humane Society of the United States, and subject to refinement by the project architect. Space/cost savings may be effected when the state veterinary agency publishes its ‘matrix’ of what is precisely mandated for facilities to fully comply.

**RATIO OF RESIDENTS TO SQUARE FOOTAGE OF NEW  
COMPLYING FACILITIES**

<u>FACILITY</u>	<u>SIZE IN SQUARE FEET</u>	<u>CURRENT RESIDENT POPULATION</u>	<u>RATIO</u>
1.) Gloucester* (100% public)	3500 square feet	35,000	1sf to 10 residents
2.) Culpepper (100% public)	5300 square feet	33,000	1sf to 6 residents
3.) Alexandria (85%-public, 15%-private)	13,000 square feet	120,000 (already built out)	1sf to 9 residents
4.) HHS—JCC/ACF (proposed)	10,000 square feet**	75,000 ( JCC/Wmbg /York (Yr. 2015-100,000)	<b>1sf to 8 residents</b> <b>1sf to 10 residents</b>
5.) James City Animal Control Facility Addition (proposed)	4000 square feet	65,000	<b>1sf to 16 residents</b>
6.) Roanoke Regional Facility (city +3 counties) (70% public) (30% private)	27,000 square feet	200,000	1sf to 7.5 residents

\*not including private  
Gloucester/Mathews  
Humane Society

## SCOPE OF SERVICES

HHS will provide:

1. Separate housing and care for all Animal Control and stray animals, as legally mandated
2. Long term holding and care for all animals involved in court cases.
3. Health exams, vaccines and disposition for all Animal Control and stray animals after the legal holding period.
4. Emergency veterinary care for all Animal Control animals and strays during the legal holding time. (Emergency care will be at the expense of the jurisdiction and will not exceed the allotted funds without permission of the jurisdiction.)
5. Emergency care (at jurisdiction expense) or euthanasia of any wild life surrendered to HHS by jurisdiction or its resident.
6. Receiving and holding of all necessary paper work for Animal Control and stray animals from jurisdiction.
7. HHS staff preparation of paperwork for return of Animal Control animals to their owners, and collection of applicable fines, etc.
8. All necessary transfer paperwork and the actual physical transfer of animals to HHS kennels at the end of the legal hold.
9. All necessary paperwork for strays brought in by jurisdiction residents.



FREEMAN

consultant to the nonprofit

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## FUNDRAISING COUNSEL FOR NONPROFIT ORGANIZATIONS

Since 1994 (part time) and 1998 (full time) have provided independent, consulting services to nonprofit organizations with emphasis on: strategic planning, board and staff development and fundraising. Particular expertise in capital and annual campaigns, in working the smaller nonprofit and with new or start-up fundraising efforts. Previous and current clients include:

- *Comfort Zone Camp*, Rockville, VA to work with Board and Executive Director in establishing a comprehensive development program.
- *Hand Workshop Art Center*, Richmond, VA to conduct a feasibility study for a capital campaign.
- *The Steamboat Era Museum*, Irvington, VA to provide pre-campaign counsel and conduct a feasibility study for a capital campaign.
- *McLeod Medical Center Foundation and McLeod Hospice*, Florence, SC to provide on-going counsel during the absence of an Executive Director and subsequently, coaching/mentoring. Provide capital campaign counsel Hospice capital campaign.
- *Circle Center Adult Day Services*, Richmond, VA to conduct a pre-campaign assessment in partnership with Lankford & Associates.
- *Gloucester-Mathews Humane Society*, Mathews, VA board development
- *The Williamsburg Players, Inc.* to conduct pre-campaign phase of proposed capital campaign for all volunteer community theater.
- *The Salvation Army of Williamsburg, VA.*, to conduct a capital campaign feasibility study.
- *St. Joseph's Villa* in partnership with H. Gerald Quiqq to conduct a development audit.
- *Virginia Baptist Association* in partnership with H. Gerald Quiqq to provide capital campaign counsel for a \$5million family retreat center.
- *Commonwealth Catholic Charities*, VA in partnership with H. Gerald Quiqq & Associates to conduct a feasibility study in preparation for \$4 – \$5 million endowment campaign and assist with pre-campaign planning.
- *Virginia Holocaust Museum* to provide counsel in organizational development, to establish a development program and to prepare for a capital campaign.
- *Westminister-Canterbury of the Blue Ridge*, VA to conduct a feasibility study – partnered with H. Gerald Quigg & Associates.

- **Virginia 4H Foundation**, Blacksburg, VA to conduct an assessment for a development program, to recommend strategies for capital campaign readiness, to assist with a search for an Executive Director, provide training to new Executive Director. Provided ongoing counsel during absence of Executive Director.
- **Shenandoah Shakespeare Company**, Staunton, VA to conduct an assessment and recommend a strategic plan for development. Partnered with H. Gerald Quiqq & Associates.
- **Shady Grove Family YMCA**, Glen Allen, VA to conduct a pre campaign assessment. Partnered with H. Gerald Quiqq & Associates.
- **Legal Information Network for Cancer**, Richmond, VA to plan and implement an annual fund campaign, provide counsel in Board development.
- **Walsingham Academy**, Williamsburg, VA as co-chairman and campaign counsel (pro-bono) for \$950,000 facilities expansion campaign at a Pre-K - 12 independent, Catholic school. First major fund-raising effort. Successful completion of campaign in eight months raising \$1,055,000. Provide on-going counsel to President and Chief Development Officer in strategic planning for development, in designing a comprehensive development program, a major gifts program and planned giving program.
- **Bethany Christian Services and King's Academy School**, Florence, SC. Provided a workshop on strategic planning for development (pro-bono).
- **West Point Performing Arts Center**, West Point, VA. Provided training sessions to campaign volunteers. Also worked with lead consultant, Lankford & Associates, in conducting a feasibility study.
- **Virginia Library Foundation**, to conduct, in partnership with H. Gerald Quiqq & Associates, an assessment and audit of development office in anticipation of an endowment campaign.
- **Virginia Foundation for Architecture**, to provide strategic planning for capital campaign - partnered with H. Gerald Quiqq.
- **Virginia War Memorial Foundation** to provide the Board counsel in pre campaign planning for an \$8 - 9 million campaign.
- **Williamsburg Area Chamber of Commerce** as on-site capital campaign director for \$1.1 million project with a \$700,000 fund-raising goal to construct a new facility. Raised \$820,000.
- **Virginia Home for Boys** to conduct an internal audit of the development office and recommend reorganization in partnership with H. Gerald Quiqq & Associates.
- **Angels of Mercy Health Care Clinic**, Toano, VA to assist with the start-up of a new free health clinic with an emphasis on Board and fund development program (pro bono).
- **Virginia Supportive Housing**, to create a strategic plan for development.
- **Marine Military Academy**, Harlingen, TX to conduct an internal audit and a seminar on philanthropy in partnership with H. Gerald Quiqq & Associates.

- **Bon Secours St. Mary's Health Care Foundation**, Richmond, VA to conduct, in partnership with H. Gerald Quiqq & Associates, a feasibility study in preparation for a \$4 million campaign for Hospice.
- **McLeod Medical Center Foundation** Florence, SC, after eight years as executive director and a relocation to Williamsburg, served as independent contractor for approximately one year during the director search and transition.
- **Rappahannock General Hospital Foundation**, Kilmarnock, VA to conduct a feasibility study, and to provide counsel in the start-up of a development program and in planning for an endowment campaign in partnership with H. Gerald Quiqq & Associates.
- **Richmond Residential Services** as a facilitator for a day long workshop at Board retreat on steps to beginning a development program.
- **Richmond SPCA** to perform an internal audit of the development office in preparation for a capital campaign and to provide counsel for an \$8 million capital campaign.
- **Virginia Blood Services** to provide consulting services for the establishment of an annual fund program.
- **All Saints' Episcopal Day School** (PreK – 6) Florence, SC, provided an assessment and written campaign plan to develop an ongoing development program with an emphasis on an annual fund program
- **Trinity Episcopal Day School** ( grades 7 – 12) Florence, SC, conducted feasibility study for both admissions and fund-raising potential for new, secondary, private school. School is now more than seven years old.
- **Spartanburg Regional Medical Center Foundation** SC, as a facilitator for a Board retreat for new Foundation.

### **Sample listing of recent presentations**

- ***Volunteer Hampton Roads***
- ***Food Bank of the Virginia Peninsula***
- ***Virginia Association of Fundraising Executives***
- ***Association of Fundraising Professionals***
- ***Greater Williamsburg Volunteer Association***
- ***River Counties Community Foundation*** , Irvington, VA
- ***Richmond Catholic Diocese Teacher and Staff Conference***
- ***Watermen's Museum***
- ***Part-time Faculty, University of Richmond School of Continuing Studies, Philanthropy Institute***



### Employment History 1979 – 1998

- **Director of Development, Child Development Resources, Norge, VA. 1995–1998**
- **Executive Director, McLeod Medical Center Foundation, Florence, SC. 1986–1994.**
- **Director of Special Projects and Major Gifts, Director of Annual Giving, Assistant Director/Capital Campaign, University of Richmond, VA. 1982 – 1986.**
- **Director of Development, Elk Hill Farm, Inc., Goochland, VA. 1981–1982.**
- **Area Services Director, Fundraising Assistant, Administrative Assistant, American Cancer Society. 1979–1981.**

### Professional and Community Affiliations

- **Member, Board of Trustees, Walsingham Academy 2003 –**
- **Member, Soroptomist Club International 2002 –**
- **Board Member, Resource Development Committee , Hampton Roads Chapter of Association of Fundraising Professionals 2001 –**
- **Member, Williamsburg Area Chamber of Commerce 1999 –**
- **National Planned Giving Council 1998 –**
- **Member, Virginia Association of Fundraising Executives, 1981 – 1986; 1994 – Program Committee Member 2001**
- **Member, Presidential Search Committee, Walsingham Academy 2001**
- **Member, Walsingham Academy Parent's Board, Williamsburg, VA, 1996 – 1999.**
- **Member, Williamsburg Community Hospital Autumn Leaf Golf Classic Committee**
- **President (two terms), president–elect, secretary and treasurer, SC Society for Hospital Fund Development, offices held since 1986.**
- **Chairman, 1992 Chamber of Commerce Leadership Florence, co–chairman 1991, Leadership Florence program participant 1990, Chamber of Commerce, Florence, SC.**
- **Member, Association for Health Care Philanthropy, 1986 – 1994. Regional conference committee member, 1988.**
- **Trustee, Civic Ballet Company of Florence 1989 – 1991.**
- **Member, Council for the Advancement and Support of Education (CASE) 1981 – 1985.**