



# Campaign Feasibility Study

*Report to the Library Board: October 20, 2014, Edited November 7, 2014*

## Executive Summary

Based on evidence provided by this study, I believe that sufficient interest and resources exist for the River Valley District Library to realize the vision of its board to construct a new facility on the South High Street site that formerly housed the Academy and then Port Byron High School at an estimated cost of \$5 million.

**Realizing this vision and goal will require leadership, intense sustained commitment, focus, and work from the Board, staff and volunteers.** It will also require a **broad, well-articulated educational campaign** focused on the library's constituents regarding the need for the new facility and the benefits it will bring to Port Byron and Upper Rock Island County. At one level, this educational component needs to outline the overall fundraising plan which, as described below, includes the plans to pursue public funds and corporate and foundation support in addition to contributions from individuals. It also needs to outline specific ways in which each individual can contribute toward the goal make this project a reality.

With these thoughts in mind, I recommend a **five-year development process with three major components:**

- First, solicit and secure public grant funds (2015-2017)
- Second, solicit and secure major gifts from individuals, local foundations and corporations (2017-2018)
- Third, a broad-based community campaign to broaden participation and reach the final goal (2019)

Concurrently, **sustained educational and marketing efforts** should begin immediately and continue throughout the five years to raise the \$5 million needed to realize this project. Community education and messaging will help you to broaden the knowledge in the community about the planned library expansion, dispel myths and rumors, build community ownership, and generate excitement.

This plan allows you to solicit and secure federal and state grants to seed the campaign and demonstrate early success. In this way, when you begin to solicit major gifts from private individuals and local sources, you should already have at least half of the campaign goal raised thereby creating momentum that encourages others to give. As outlined in the body of this report, if successful, you should only have to raise about \$1 million from individual donors. Finally, once you have most of the funds raised, opportunity for other individuals in the community to invest in this project – usually with lower dollar amounts – completes the project. As a result, the River Valley Library District will have a

new and renewed community resource that serves as a source of pride in Upper Rock Island County while meeting the informational and community gathering needs of those it serves.

To be clear, this campaign faces three major and very real challenges: (1) A gap exists between the broader group of citizens and the grand vision of the board and a few dedicated volunteers and staff who are closest to the project; (2) Not understanding the scope and need for the project, skepticism exists about the probable success of this campaign among many of the individuals with whom I spoke; and (3) A large campaign goal like this may exceed the ability of community individuals alone to provide, especially given the other challenges and perceptions of community needs. Through its recommendations, this report lays the conceptual and process dimensions of the project to begin to turn these challenges into positive results.

As part of the educational campaign, I strongly urge you to **rebrand this project as a community center with a library rather than a library with community space**. While not intended to minimize the important role that the library plays in the community – and the central role that the River Valley District Library plays in upper Rock Island County – this rebranding will overcome the prevalent perception that society and communities no longer need library buildings given the pervasiveness of the internet and e-books. All but the most ardent library supporters voiced a concern about the need for more physical space in the library with the proliferation of these electronic media. When discussed in terms of space for community gathering and learning, most people easily saw and supported the need.

**Volunteer recruitment and training** constitute another important aspect in the first phase of the campaign. Successfully launching and executing a campaign of this magnitude requires that you recruit volunteers to help staff and board members with all phases. Library staff already have full-time jobs as do many of the board members. While all of them expressed a willingness to “do what it takes” for this campaign to succeed, in reality, few have the capacity to assume a large portion of the campaign. I believe a sufficient number of talented and dedicated volunteers exist in the community as I saw a great fondness for the library among those I interviewed. We need to set up the volunteer structure in the first year of the campaign to recruit and train individuals to assume the key roles needed for this campaign to succeed.

## Background and Fundraising Environment

River Valley District Library serves approximately 5,100 community members who reside in Upper Rock Island County: Cordova, Hillsdale, Port Byron, Rapids City, Hampton, Joslin, Osborn, Barstow and East Moline. More than 2,700 residents – or 53% – have a library card, although the frequency of visits varies significantly among library card holders. The library serves as a taxing body with a portion of resident’s property taxes (0.04% in 2013) supporting the library’s operations. The Library Board is committed to raising the necessary funds for this project without raising taxes.

Six libraries lie within 10 miles of Port Byron: Princeton (IA), Cordova, Hillsdale, East Moline, Silvis and Colona. Cordova – located about 5 miles from the River Valley District Library – has a small library that serves that community. A few feasibility study participants noted that they have visited the Cordova Library for programs and other purposes. It appears that the Cordova Library may plan to expand which

would provide direct competition for this project. Larger libraries in both Iowa and Illinois – notably Bettendorf (IA) and Moline (IL) also serve the needs of local patrons. At least one interview subject asked about possible collaborations between local libraries as a way to expand the services that River Valley District Library can offer rather than building new.

Most of the larger libraries in the Quad Cities have conducted large capital campaigns to construct or renovate their facilities over the last decade. In 2006, Moline opened a new, 67,000 square foot, \$12.5 million library; Davenport opened the \$8 million Fairmount Street location; and Rock Island invested \$153,000 in a renovation project at its library. The Davenport Public Library Eastern Avenue Branch opened in 2010 and cost \$8.2 million for 26,000 square feet. Earlier this year, the Bettendorf Library invested \$1.5 million in its interior renovation project. While the success of these library projects bodes well for the overall support available in the broader Quad Cities community for its libraries, demonstrating the need to invest \$5 million in a library for these smaller community when these large, modern resources sit in relatively close proximity may prove challenging.

The recession in 2009 caused giving for all purposes to decrease. Since then, both the economy and giving have rebounded nationally. Total charitable giving from U.S. individuals, corporations, foundations and bequests in 2013 totaled an estimated \$335.2 billion, an increase of 4.4% over 2012. Adjusted for inflation, this level of giving approached the peak seen before 2009. Giving by individuals constitutes 75-80% of this total. The Standard & Poor’s 500 Index (S&P 500), which impacts the financial outlook of wealthier donors more than the finances of others, rose significantly in 2013 over 2012 and likely catalyzed giving by these donors<sup>1</sup>.

Unemployment for Rock Island County was at 7.1% in July 2014, down from 7.9% the year prior. Unemployment in Port Byron mirrors the county as a whole. While higher than the nation as a whole, in general, the local economy has rebounded from the recession.

U.S. residents constitutently contribute 2% of the gross national product to charitable causes. Residents within the River Valley Library District follow that trend<sup>2</sup>.

<b>Total Giving in 2012</b>			
<b>Zip Code</b>	<b>City</b>	<b>% of Adjusted Gross Income</b>	<b>Amount Contributed</b>
61275	Port Byron/Rapids City	2.16%	\$2,053,000
61242	Cordova	1.62%	451,000
61257	Hillsdale	2.05%	302,000
61256	Hampton	2.01%	755,000
61244	East Moline	2.93%	6,237,000

Some of the other factors examined when looking at the fundraising environment and likelihood of success include the demographics of the community and overall economic growth. Port Byron and Rapids City both have a large concentration of families and working adults (between the ages of 45 and

<sup>1</sup> *Giving USA, 2014*

<sup>2</sup> <http://philanthropy.com/article/Interactive-Explore-How/149107/#search>

64), both of which bode well for the success of a campaign to raise funds for a library or community center<sup>3</sup>.

City	Population	% under 18	% 18-24	% 25-44	% 45-64	% 65+
Port Byron/Rapids City	4,506	22.6%	8.0%	22.1%	33.6%	13.7%
Cordova	1,092	17.3%	6.1%	23.2%	34.7%	18.7%
Hillsdale	1,051	13.3%	8.5%	23.4%	34.4%	20.4%
Hampton	2,099	22.2%	6.5%	26.7%	30.4%	14.3%
East Moline	24,251	21.9%	7.9%	26.4%	26.0%	17.8%

Feasibility study interviewees mentioned both Riverdale Schools and their church as competing interests for their discretionary funds and time. More than one person talked about the high quality of Riverdale Schools and the dedication that its parents (and grandparents) have to assure the quality education their children receive. With school budgets cut across Illinois – and Riverdale no exception – they mentioned the need to increasingly support the schools financially. This bodes well for the library/community center campaign with arguments that tie the library to the education of the children in the community, especially the library’s relationship with Riverdale Schools and how the library has helped fill in gaps left by cuts to the school libraries’ budgets. However, it also presents a challenge when residents have to choose between the school and library for its philanthropic dollars.

### Study Process

This study proceeded through four phases to engage potential donors and volunteers as well as staff and board members in the forthcoming campaign. Through these four phases, questions sought to understand the individual’s perceived need for a new library and current plans for the renovation of the Old Academy site, their understanding of the overall community’s perception of the project, and their willingness to commit – financially and as a volunteer – to this project. Questions for staff and board members also sought to understand their capacity to launch and manage a campaign of this magnitude. Appendix A has the questions for both the external and internal portions of this feasibility study.

Phase I engaged board members and prominent community individuals including political figures. It had three purposes:

1. To gauge the board’s interest and commitment to this project
2. To determine the political or public interest and commitment to this project
3. To begin to identify other individuals in the community to engage in this process

Phase II talked to staff about their perceptions of the campaign and their role in the campaign. It had as its goal identifying internal strengths, weaknesses, and needs to accomplish this campaign.

Phase III met with individuals who represented the local corporate and foundation community to gauge their interest and support for this project and begin to get a very real sense of the money available in the community to finance a project of this magnitude.

<sup>3</sup> <http://philanthropy.com/article/Interactive-Explore-How/149107/#search>

Phase IV met with individuals in the community – mostly Port Byron – who had a library card and indicators of wealth. These individuals and couples serve as potential major donors for this campaign. The library also added another trustee since this project began so we included him in this phase as well.

For all phases, the identified individual or couple received a personalized letter from the library signed by Shelli Fehr, director, and Barb Brandt, initially chair of the library board and then fundraising committee chair, explaining the process and inviting their participation. The letter also included a 4-page copy of the case for support (Appendix B). All totaled, we invited 107 persons external to the library and all nine full-timestaff to participate. Linda Wastyn from Wastyn & Associates personally called each individual to schedule a 1-hour interview at a place and time of their convenience to discuss the project and gather their perceptions. Thirty-five external individuals and all staff agreed to participate in the study (Appendix C).

## Major Themes

In analyzing respondents' comments, four themes emerged for consideration as this project develops.

First, an interview subject mentioned that **residents do not all have a commitment to the community**. This person mentioned that people tend to move into the community to send their children to the local schools because of Riverdale's quality and small school environment, a perception I validated with other interviewees. The large percentage of children under the age of 18 also supports that claim. This person also mentioned that these families leave the community for the larger Quad Cities once their child graduates, leaving a hole in the tax rolls. The large percentage of adults in the 45-64 range questions that assumption. While Port Bryon and Rapids City have a smaller percentage of elderly residents (older than 65) compared to the other cities within the tax district, it has more elderly than Illinois as a whole (13.7% vs. 12.7%). While perhaps not a large problem, the campaign committee should know that this perception exists.

Second, the **economic and political conditions** that may impact this project come from the state of Illinois and general political mistrust that exists in this country today. Coincidentally, this study occurred in the months preceding the midterm elections. While economic uncertainty may have waned in some areas of the country, I found many respondents unwilling to commit to this project pending the outcome of the state elections. They dislike the corruption in Illinois politics and question the likelihood that the state will turn itself around financially. With a reliance on the state for a large portion of the grant funds required for this project, this becomes an important consideration. Those most knowledgeable about state politics (e.g., the elected officials) seemed confident that sufficient funding exists and will exist at the state level to support this project.

This general distrust and dislike of government spills over to the library as a taxing body. Some interview subjects simply did not trust that the library will not raise taxes to support this project. Overall, property taxes in Illinois have increased from 1.93% in 2010 to 2.28% in 2012 or 18%, although the library tax has increased by only 0.0342% of the assessed property value over the last decade. For the average Rock Island County homeowner, this overall increase translates to an additional \$2,000 - \$3,000 per year in

their property tax bill. People indicated that this increase has hurt them financially and fear that future increases will compound the problem. They cannot or do not separate the overall tax increases with the relatively small portion that goes to the library.

Third, a **lack of community experience with a large fundraising effort** exists. According to one respondent, Port Byron has never had a capital campaign of this magnitude. While many residents have connections to organizations throughout the other Quad Cities that may have raised these kinds of dollars, the community itself has not. This has both positive and negative implications. On the positive, residents of the River Valley Library District – most of whom expressed great pride in their community – have never had the opportunity to invest in and create such an impactful project. Likewise, this project does not have to “stand in line” while donors pay off pledges to other major community initiatives (individual churches as a possible exception). On the negative side, I found community residents generally uniformed about the capital campaign process and the types and size of gifts needed to complete a project of this magnitude. While not an insurmountable obstacle, it points to the need to educate the community about the project and the campaign process. As an outgrowth of this process, at the conclusion of the campaign the library should be better positioned to raise significant private funds in the future. The success of this project should also raise the sights of other community organization that may see the potential to invest more heavily in the Port Byron and Upper Rock Island County communities with raised dollars.

Finally, Port Bryon recently underwent a process to develop a **Comprehensive Downtown Development Plan** that has among its goals “to create a distinguishable identity for the community.” The creation of a community center near the downtown, removal of an eyesore from the main road into and through Port Byron, relocation of the library from the downtown to make way for retail businesses on its prime riverfront property, and the overall economic and tourist income that the new library could attract all fit within the broader confines and purposes of this plan. This part of the case strengthens arguments of the library as an economic development catalyst and opens the doors for possible collaborations with both public and private entities.

**Findings, Recommendations, and Strategies**

Successful completion of this plan should result in the \$5 million needed to construct the envisioned new library with funds raised as outlined below:

Source	Amount
IL Public Library Grant	\$2,400,000
Other State Grants/appropriations	1,000,000
Federal grants	300,000
Corporate/foundation support	300,000
Individuals	1,000,000
<b>TOTAL</b>	<b>\$5,000,000</b>

Based on the information gathered in this study, I find these targets challenging, but reasonable. The Illinois Public Library Construction grant serves as a lynchpin for this project; its success or failure may very well dictate the overall success and timing of the project as a whole.

Support in the Community: **Guarded support exists for this project in the community.**

Recognizing a Need for a New Library: Some individuals enthusiastically supported the need for a new library while others either noted “Port Byron just built a new library” or that “libraries have become obsolete in the age of the Internet and e-books.” The latter was the more prevalent reaction. Not surprisingly, those who use the library most frequently saw the greatest need, especially those with children or who use the program room. A number of individuals who only check out books felt the library adequately served the community’s needs. When described in terms of the community space and the library as a gathering and learning place for the community, most of the skeptics expressed their support. The need data and usage statistics also persuaded some that a need exists.

- **RECOMMENDATION 1: Recast the case for support of the project in terms of the community center aspect rather than a focus on the library itself.** When I asked a few people flat out if they would support a community center rather than a library, most found the community center more appealing and persuasive. While not a change in the project itself, I believe this rebranding will increase community support
- **RECOMMENDATION 2: Implement a community education program over the next three years that continues during the entire campaign period and focuses on (1) River Valley District Library as their library; (2) amenities and services of today’s library (e.g., “not your parents’ library”); and (3) the needs and plans for the new library.** Most misunderstandings or misinformation revolved around these topics

Public figures interviewed – especially State Senator Mike Jacobs and State Representative Mike Smiddy – clearly saw the need for this project and the direct and indirect benefits it could bring to Upper Rock Island County. More on their support appears under the next section “Availability of Public Grant Funds.”

Support for the New Library Concept: The chosen site and the concept for the renovation as currently designed had more support than the need for a new library itself. Even those who did not necessarily support the need statements **saw value in moving the library to the Old Academy site** and got excited about the possibilities that the new library presents. Some expressed doubt that the community needs as many square feet as proposed, and one person questioned if the concept represented a community “need” or a community “want.” Distinguishing these will become important when presenting the case to the community.

While some people knew of the discussions around other possible sites, **only one couple expressed a clear interest in either renovating the existing site or moving to any of the other sites considered.** Some lamented that renovating the current site cannot meet the library’s needs, but this came more from a sense of nostalgia or loss rather than opposition to the current plan. Many expressed a real

desire and delight to “get rid of the eyesore” of the Old Academy site and preserve that part of Port Byron history. A number of people either attended high school there or had a relative who did. Preserving that piece of history really resonated with this subgroup.

An interesting note on the site: Some people did not recognize it as the “Old Academy” site and asked the origins of that name. A minor point, but going forward, the campaign should describe the site in a way that better resonates with the audience.

Other than the site itself, people liked the following features of the proposed new library:

- Keeping the architecturally-significant ceiling in the gymnasium
- The larger and more program rooms
- The children’s area
- The children’s dedicated program room and patio
- The café (although one person thought it dishonest to call it a café if it only has vending options)

Some of the questions or points of discussion on the proposed new library included:

- The status of the outbuilding: some asked if that building could become a “gymnasium” or space for large motor activities. A few others suggested moving city services to that building
  - The availability of the program room for personal events such as wedding receptions
  - The ability to preserve the historic façade or at least to recreate some of the unique architectural elements of the building in the new design
  - The safety of crossing Route 84 for patrons who might walk or bike from the west; do plans exist to create a crosswalk or light on Route 84 at the building?
- ***RECOMMENDATION 3: Retain the proposed site, refer to it differently when describing it to constituents, and highlight its historical significance, ability to get rid of an eyesore, and its potential to spur economic development in Port Byron and Upper Rock Island County as well as some its amenities especially in the program room and children’s area***

Availability of Public Grant Funds: I believe the success of this project hinges on the ability to receive public grant funds. The entire \$5 million from private sources alone (individuals, corporations and foundation) likely does not exist for this project.

Toward that end, the feasibility study engaged State Senator Mike Jacobs, State Representative Mike Smiddy, Port Byron Mayor Kevin Klute, and Rapids City Mayor Greg Rankin as well as representatives from Senator Dick Durbin and Representative Cheri Bustos’ Offices. The local and state politicians all expressed total support for the project. Both of mayors also pledged their support. Since the Village of Port Byron owns the site currently, we may need them to submit grant applications for some pre-construction planning and work.

Our research found about \$2.9 million in grant dollars from the state of Illinois and another \$500,000 from the federal government.

State Grant Sources: The state of Illinois has numerous possible grant sources that can help fund this project, the most important of which comes from the Illinois Public Library Construction Grant Program. This program alone could provide, based on its formula, an estimated \$2.4 million toward the total project cost. Successfully competing for these funds will likely determine the future success and timing of this project. This grant has an annual deadline of April 15 and, while not funded in recent years, both Senator Jacobs and Representative Smiddy felt it would receive funds in 2015. Regardless, the River Valley District Library needs to “get in line” for this grant which starts with an application for the 2015 deadline.

Successfully competing for this grant requires numerous pre-steps which must begin immediately especially since funding may come a few years after the submission of a successful grant application.

- **RECOMMENDATION 4: Begin working immediately on the pre-work required to submit the Illinois Public Library Construction Grant application in April 2015.** These steps include:
  - **Re-engage with the architectural firm to produce the necessary documentation – especially historic preservation documents – to complete the application**
  - **Visit with the Illinois Historical Preservation Agency to discuss the project and potential application and secure their support;** Kevin Eipperle, Principal with FEH Associates, has experience working with this agency and would provide important insights and expertise for this stage of the process
  - **Work with Senator Jacobs and Representative Smiddy to garner their support and advice as you proceed with this application**
  - **Visit with the appropriate individual(s) in the Illinois State Library as you work on this grant**
  - **Complete and submit the application by the April 15, 2015, deadline**

Other grant funds also exist at the state level for clean energy use, computers, and historic preservation. Appendix D has the complete list of state grant funds that we found thus far.

- **RECOMMENDATION 5: Complete research and create a calendar for state grant opportunities beginning in 2015.** This will require visiting with grant officials at these state agencies to get more information on these programs and re-engaging with the architect for the necessary drawings and technical information to complete the grant applications.

Federal Grant Sources: Appendix E provides a list of the federal grant sources that we found for this project. While we need to conduct more in-depth research to discover the exact nature and criteria for these grant programs and how they might help the library construct a new facility, we found preliminary evidence that suggests we can find funds for the following purposes related to the project:

- Construction of community space in a rural community
- Removal of asbestos and cleaning any other site hazards for the site
- Preservation assessment services including hiring a preservation consultant
- Purchasing preservation storage equipment and supplies (for the Port Byron Historic Society Room in the library)

A number of other grant programs will help with programmatic funding which we may be able to use for construction costs indirectly; these require more detailed analysis and discussions with the funding agency.

- **RECOMMENDATION 6: Create a federal grants calendar and pursue opportunities for pre-construction needs (e.g., preservation assistance, removal of asbestos) beginning in 2015.** This requires re-engaging with the architect for the necessary drawings and technical information to complete the grant applications. However, as I believe Kevin is certified as an historic preservation specialist, his fees might be partially offset with grant funds for preservation assessment services. This needs additional analysis and review in addition to visiting or calling appropriate officials in these federal agencies.

I also recommend working with Joe Taylor at the Quad Cities Convention and Visitor's Bureau to leverage the new library's location as a welcome center for Upper Rock Island County. He suggested we might find funds connected to Bicycle Tourism, the National Scenic By-Way, Great River Region Tourism Development, the Great River Road, and the Great River Trail. Additional funds may exist from the Illinois Department of Transportation, Federal Highway Administration, and Illinois Office of Tourism for this aspect of the project. More research and conversations with tourism officials across the state will determine the viability of these types of grant sources.

- **RECOMMENDATION 7: Investigate the feasibility of additional grant sources leveraging the role the new library will play in local tourism and economic development of the region.**

Local Corporate and Foundation Support: Local corporate and foundation support hinges on the ability of the project to demonstrate a strong business case (e.g., Can you raise the money you need? Can you operate the new library with existing resources? Do you have the financing to start the project before all the pledges are paid? Have you successfully seeded the project with other funds [e.g., the Illinois Library Construction Grant]?). Similarly, local corporations in particular want to know the impact of the project on their company and employees. I believe we can make this case and receive positive responses from local corporations and foundation with support that would total approximately \$300,000.

- **RECOMMENDATION 8: Cultivate and engage local corporate and foundation representatives over the next two to four years to keep them informed about the project and solicit them when appropriate**

**NOTE:** Prior to submitting grants for local support, the library also needs to submit its plan and the results of this study to the Quad Cities Contributors' Council for their approval.

Illinois Capital Improvement Budget: Not included in these totals are potential funds from the Illinois Capital Improvement budget that both Senator Jacobs and Representative Smiddy mentioned as distinct possibilities. Depending on the outcome of the November elections, work on the Capital Improvement budget could begin as soon as January 2015.

- **RECOMMENDATION 9: Immediately after the election (and assuming reelections), contact Senator Jacobs and Representative Smiddy to begin working on the information they need to include the library in the Illinois Capital Improvement budget.**
- **RECOMMENDATION 10: Follow the lead of Senator Jacobs and Representative Smiddy but be prepared to hire a lobbyist in Springfield to work at key times in the process of the bill's passage and funding**

Assuming we receive funds in this manner, we need to prepare messages that counter the criticism that the library used tax dollars to fund the project. I firmly believe this approach remains consistent with the library's stance to not raise tax dollars to fund the project and should be vigorously pursued.

Other Private Grant Sources: A limited number of national foundations may have an interest in this project as well. I would research these in more depth including contacting the foundations by phone to gauge the likelihood of success before pursuing them further. If the likelihood of success seems remote, the time spent working with these foundations might be better invested in the local community. However, if the likelihood of success seems promising, it might be worth working with some of these national or regional foundations. Appendix F has a list of all of the private grant sources we have found thus far, both local and nationally.

Individual Donors: Successfully raising these funds from public sources as well as corporations and foundations leaves a very manageable balance of \$1 million to raise from residents of the library district. (See Appendix G for three campaign pyramids to raise these funds.) Based on my interviews, I believe that with the right information and cultivation, this project can raise these funds.

## Next Steps

As noted in the introduction, I recommend a three-phase development process that seeks and secures public funding (though state and federal grants) as well as limited private contributions from those individuals and organizations already invested in this project while you build broader support throughout the community. In the second step, you leverage the relationships cultivated in the first phase to secure major gifts from individuals in the community. The final step broadens support for the campaign by asking the rest of the community to contribute.

Based on this philosophy and the recommendations noted previously, the following table outlines the recommended next steps and a suggested timeline for each. The timeline assumes the project begins in 2015 and raises funds for 5 years. Significant early successes may hasten that timeline.

Phase	Activity	Timeline
Campaign Phase I	Follow-up with Feasibility Study participants to communicate outcomes	ASAP
	Discuss Capital Budget with Senator Jacobs and Representative Smiddy	ASAP
	Board and staff training on the campaign and their roles and responsibilities	2015, Q1
	Research, review and prioritize possible federal and state grant opportunities	2015, Q1
	Prepare for Illinois Public Library Construction Grant submission	2015, Q1
	Re-engage with the architect to create necessary documents for applications	2015, Q1
	Submit Illinois Public Library Construction Grant	4/15/15
	Cultivate and solicit engaged potential major donors	2015-2017
	Implement branding and image campaign for the library/community center	2015-2017
	Submit grant applications as identified by stated deadlines	2015-2017
	Develop and implement a media and social media campaign to announce news	2015-2017
	Identify other potential individual major donors for the campaign	2015-2016
	Create volunteer structure for the campaign	2015, Q3-4
	Identify, recruit and train volunteers	2016, Q1-2
	Host cultivation sessions for potential major donors	2017
Campaign Phase II	Solicit individuals major donors	2017-2018
	Solicit local corporations and foundations (not included in Phase I)	2017-2018
	Continue to announce news as it pertains to major gifts and campaign progress	2017-2018
Campaign Phase III	Implement broad-base campaign via traditional and social media channels	2019
	Campaign celebration when final goal reached	2019
	Groundbreaking	2019/2020

Prospect identification and cultivation, campaign messaging and education, and donor stewardship continue throughout all three phases of the campaign with solicitation of prospective donors at the time the campaign planning team determines appropriate and the submission of grant applications prior to their deadlines.

## Challenges

A project of this magnitude does not come without its challenges. While I truly believe raising these funds is possible, it will not be easy. Through this feasibility process, I identified the following potential challenges for which the fundraising committee and library board need to prepare:

1. **Lack of knowledge of the project itself:** Many people in this study had heard that the library planned to build a new facility, but few knew the details. The informational campaign recommended for the first three years of this project should begin to overcome that lack of information and awareness. Targeted cultivation sessions for potential major donors beginning

in Year 3 will further inform and engage those with the potential to make the greatest economic impact on the project prior to a formal request for funds from them.

2. **Lack of knowledge and understanding** among the community of the requirements to raise funds of this magnitude: Individuals in the feasibility study who professed great support for this project did not seem to understand the financial commitment it will require by each individual. Education on the campaign process will help to overcome this challenge.
3. **Taxes and general mistrust of government:** People feared their taxes would increase with the new library, some simply not believing that the library will not raise taxes. A misperception also exists between the difference in using public funds through a grant or the appropriate process and the levying of additional taxes. For some, a general mistrust of government spills over to the library as a taxing body. Again, education will help to overcome this challenge as will not soliciting individuals who hold this view.
4. **Perceived irrelevance of libraries** with the proliferation of the Internet and e-books. Rebranding the campaign in terms of a community center should help overcome this negative perception.
5. **Competition from other libraries** and community priorities (e.g., schools and church), especially if the Cordova Library embarks on their own campaign. Tying the project to the needs of Riverdale Schools and demonstrating how helping the library will help the schools should harness that competition instead of being hurt by it.
6. **Skepticism of the ability of the library to raise \$5 million:** The proposed campaign design – with public support raised first – should help to overcome this perception. If we go to the community asking for \$1.3 million (from individuals, corporations, and foundations) rather than \$5 million, I believe the campaign will succeed.

## Opportunities

That said, this campaign also has a few opportunities working in its favor:

1. **No prior campaigns in Port Byron** means that potential donors have not had the opportunity to make such a large impact in their home community nor will they have other campaign obligations
2. **Little objections exist to the project itself:** A significant majority of those who believe that libraries have a future in the Upper Rock Island County communities and society as a whole and see a need for a larger facility like the specifics of this project.
3. **A significant majority of those who know the details of the project support it enthusiastically.**
4. **The case for support resonated with interview subjects** who did not have a predisposition against either the need for libraries in particular or against government organizations as a whole.

## Internal Campaign Management:

Realizing this vision and goal will require leadership, intense sustained commitment, focus, and work from the Board, staff and volunteers. This begins with the commitment of the board to move forward with the campaign and to dedicate resources – both human and financial – to its success. Board

education on the campaign process serves as an important first step to translate the vision and enthusiasm noted so far into a sustainable process to realize that vision.

In addition, managing a campaign of this magnitude requires a strong committee and cadre of staff and volunteers to take care of both the details and overall campaign management. I recommend the following steps for managing the campaign internally:

1. **Educate the board and staff** on the process for capital campaigns and the case itself so they can answer questions and begin to serve as advocates for the project beginning day 1
2. Provide **frequent updates for staff and board members** throughout the campaign so they continue to provide accurate, knowledgeable information to constituents with whom they interact
3. Identify and recruit a **Campaign Steering Committee** consisting of board and non-board members to manage the overall strategy of the campaign; develop job descriptions for Campaign Steering Committee members
4. Identify and recruit **Campaign Chairs**, both “working” and honorary leaders of the campaign
5. Develop a **volunteer leadership structure** with committees for key campaign activities (e.g., communication and marketing, grants development, major gift identification and solicitation, stewardship, events)
  - a. Write job descriptions for members and chairs of each committee
  - b. Identify and recruit chairs for each committee
  - c. Identify and recruit members for each committee
  - d. Identify roles, responsibilities, and timelines for each committee
  - e. Host training sessions for volunteers
6. Develop **internal campaign processes and procedures** including person(s) responsible for each (staff, volunteer or out-sourced):
  - a. Proposal development (for grants and individual donors)
  - b. Brochure creation
  - c. Pledge cards
  - d. Gift processing including sending reminders and gift acknowledgement
  - e. Report generation of gifts received
  - f. Recognition program implementation
7. Develop and approve **internal policies** regarding gift acceptance and recognition processes

Given the complexity and time-consuming nature of the seven steps listed above, I highly recommend that you invest in and hire a **campaign manager or consultant** with the knowledge and experience to oversee and manage this entire process.

## Conclusions

Through the feasibility study process, I identified sufficient interest and resources to raise the \$5 million needed to complete this campaign. However, the success of this campaign rests on the ability to raise public funds through grant sources, especially the Illinois Public Library Construction grant. Luckily, the

library has the strong support of its local state representatives. This study identified approximately \$3.7 million in state and federal funds that can fund this project, leaving \$1.3 million to raise from local individuals, corporations and foundations. With sufficient information through an educational campaign and cultivation in the first two years of this project (during which the library secures public funding), this study found these resources available.

**Board adopted 11/17/14**