

THE BRETON GROUP

Development Consulting for Non-Profit Organizations

FINAL REPORT

FEASIBILITY STUDY REPORT FOR FIFE LAKE PUBLIC LIBRARY

Prepared for:

Fife Lake Public Library Board of Directors and
Traverse Area District Library Board of Directors

Prepared by:

The Breton Group, Inc.

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TABLE OF CONTENTS

I.	BACKGROUND INFORMATION _____	1
II.	METHODOLOGY _____	2
III.	EXECUTIVE SUMMARY _____	3
IV.	THE FINDINGS: FAVORABLE & UNFAVORABLE FACTORS _____	5
V.	CONCLUSIONS _____	8
VI.	RECOMMENDATIONS _____	10
VII.	PROPOSED CAPITAL CAMPAIGN ORGANIZATION CHART _____	13
VIII.	PROPOSED CAPITAL CAMPAIGN TIMELINE _____	14
IX.	PROPOSED CAPITAL CAMPAIGN BUDGET COMPONENTS _____	16
X.	INTERVIEW CANDIDATES _____	17

APPENDICES

CASE FOR SUPPORT

INTERVIEWEE COVER LETTER

INTERVIEW QUESTIONS

I. BACKGROUND INFORMATION

PURPOSE OF THE STUDY

Before any initiatives can be taken to develop a viable funding program for the proposed Fife Lake Public Library project, appropriate preliminary information must be gathered. The feasibility study provides objective data that will assist leadership in making critical decisions concerning the capital project. This feasibility study was conducted for the exclusive benefit of Fife Lake Public Library and Traverse Area District Library.

This study focused on factors that will impact the potential for major private financial support within the Fife Lake community. Following are elements that were pursued through a series of open-ended questions.

- Awareness of the proposed Fife Lake Public Library construction project:
 - Knowledge of the library and the plans for construction of a new facility.
 - Knowledge of current library programming and services.
 - Understanding of the need for additional and improved library space.
 - Awareness of the different potential constituent groups.
- The potential to secure \$400,000 in private support:
 - Assessment of support from individuals, businesses, foundations and other prospective major donors.
 - Understanding and acceptance of the case for support.
 - Availability of volunteer leadership for the capital campaign.
 - Identification of a pattern of lead gifts.
 - Appropriateness of timing, relative to other community fund raising activities.
- Potential level of project support:
 - Assessment of the community's attitude toward the proposed campaign and millage.
 - Assessment of the community's general economic condition.
 - Assessment of elements in and outside the community that might contribute to the campaign.
 - Assessment of other strategies/options that might be explored to achieve the desired campaign objective.
 - Assessment of the community's willingness to approve a millage and participate in a capital campaign, to provide leadership and financial support.
- Advisability of a major capital campaign and millage to answer facility and resource needs.

II. METHODOLOGY

PROCEDURES EMPLOYED IN THE FEASIBILITY STUDY

- Research
 - Review of the architectural renderings and project costs.
 - Development of a case for support.
 - Discussion with Fife Lake Public Library and TADL Board members.
 - Determination of potential interview candidates representative of the Fife Lake community.

- Interviews

Personal, confidential interviews were conducted with a representative group of community members. Interviewees were asked open-ended questions and had the opportunity to offer other pertinent information. While attention was given to a specific pattern of questions, each interviewee was given ample opportunity to expand upon his/her own thoughts and feelings. Careful consideration was given to the understanding and agreement of the proposed project, the level of potential funding support, campaign timing and prospective campaign leadership.

- Analysis

Information, perceptions, questions and concerns generated through the interviews, as well as other pertinent materials and data, were assessed and evaluated by The Breton Group. This report documents our best judgment regarding the potential for major private support for the proposed Fife Lake Public Library construction project.

III. EXECUTIVE SUMMARY

Following careful evaluation of the favorable and unfavorable factors identified as affecting potential fund raising, it is the judgment of The Breton Group that the Fife Lake Public Library *does have the potential to realize its vision for a new/larger library facility, but not according to the current plan.* Fife Lake residents care about their community, appreciate the library and are generally aware of the critical need for additional and improved library space. These factors, among others, have led community members to indicate a willingness to support a library project. However, continued work to revise the final plan, further education in the general community, and clarification of the library's relationship with TADL are necessary prior to initiating a capital effort.

Generally, Fife Lake residents believe a new library would be a wise investment, a welcome addition and a source of community pride. And, while community members are generally supportive of a project to address library needs, they are skeptical about the appropriateness of the current plan. Major limitations to greater support of the proposed project include:

- A general lack of awareness in the greater community about the need and the plan for a new library.
- Concern about the stability of the library's long-term relationship with TADL. *(Note: The library's multi-county service population complicates its relationship with TADL, specifically in regards to funding.)*
- The perception that the size and scope of the proposed plan are too extensive/extravagant and the resulting costs are too high for the Fife Lake community.
 - There was concern that the community does not have the financial resources necessary to fund a \$400,000 capital campaign.
 - There was skepticism about the broader community's willingness to approve a capital millage.

Current private gift potential for a new library facility is judged to be in the range of \$100,000 to \$150,000.

It is our judgment that, prior to initiating a building campaign and project, it will be vital for library leadership to:

- Work with TADL to determine branch status and develop a long-term plan for operational funding, and communicate the resulting plan to the community.
- Thoroughly explore alternatives to the current plan, and educate the community regarding all options reviewed and the resulting decision.
- Revise the plan and reduce project costs to a level that is acceptable and appropriate to the community.

- Communicate the needs the library is facing and how the project addresses those needs to the community.

It is our further judgment that to realize complete success, library leadership must strategically plan for a millage vote, taking into consideration area residents' sensitivity to raising taxes as well as competing community projects.

In conclusion, it is our firm belief that while there are important challenges to be considered, if library leadership follows the recommendations outlined in this report, the Fife Lake community will rally to support a new expanded library project to meet community library needs.

IV. THE FINDINGS: FAVORABLE & UNFAVORABLE FACTORS

The following favorable and unfavorable factors, identified through the interview process, are determined to have an effect on the fund raising potential of Fife Lake Public Library. In addition to providing the basis for the conclusions and resulting recommendations in this study, these factors need to be considered when planning and implementing fund raising initiatives for a new library.

COMMUNITY

Favorable Factors

1. Interviewees were positive about the community, describing Fife Lake as a “small town,” “caring,” “friendly,” “quiet,” and “welcoming.”
2. The majority viewed the area as growing and changing. Some pointed to a slow influx of more affluent retirees and others moving from Traverse City, as well as the school’s recent shift up to a Class C as indicators of change and growth.
3. Many of those interviewed believed the community is becoming increasingly open to progress and change. The area is perceived as becoming more forward-thinking in its planning.

Unfavorable Factors

1. While there is a clear desire for progress in the community, there was general consensus that progress is not coming easy and the area is “struggling to grow.”
2. While respondents were positive about living in Fife Lake, many commented on the area’s high level of lower-income, working class residents.
3. Most of those interviewed rated the local economy as fair to poor. Many referred to the recent closing of the local grocery store as an indicator of the struggling local economy. Others commented on the fact that most people must commute and travel away from Fife Lake to work.

LIBRARY

Favorable Factors

1. Most respondents recognized the importance of the library to community life. Many commented on the role the library plays in learning and education, especially for children, and the great resource it is in providing Internet access to everyone in an area where personal home computers are not particularly common.
2. The majority of interviewees were familiar with the Fife Lake Library and its programs and services, and many classified themselves as current users.

3. The majority of interviewees felt the library had a very positive image in the community and appreciated the library director and staff, praising them for their good service.
4. Interviewees were positive about the library's programs and services, especially the benefits of linking with TADL, while acknowledging they were affected by space constraints.
5. Most of those interviewed recognized that the existing facility was much too small to meet community library needs.

Unfavorable Factors

1. There was substantial concern about Fife Lake's position and future within TADL. Many feared that, because of its geographic location, the Fife Lake Library is lowest on TADL's list of priorities.

PROPOSED PROJECT

Favorable Factors

1. The majority agreed that "something" must be done to address space needs and believed the community would be supportive of a project.
2. Many were excited about the plan for additional library space and believed it would be a valued improvement and source of pride in the community.
3. Most interviewees reacted positively to the location of the proposed new site.
4. Interviewees viewed the proposed community room, technology and youth services as important elements of the plan and key to garnering community support.

Unfavorable Factors

1. The majority of respondents believed the scope of the proposed project was significantly more than what is needed. While supportive of some level of expansion, the majority thought the plan, as proposed, was too large and too costly for the community.
2. There were many comments about the lack of communication/visibility of the project in the general community. Many had received very little information since they first heard about the project and felt that, as a result, the plan had lost much momentum in the community.
3. Many questioned whether a new building was the best option and wondered if other options, such as expansion of the current library or renovation of another existing building, had been considered or explored.
4. Several questioned the status of the plan to combine the library with a senior center, another prominent community issue.

5. There was uncertainty among many at potentially becoming a branch of TADL. Some were concerned with the loss of control associated with becoming a branch library, while others doubted TADL's commitment to support Fife Lake in becoming a branch.

COST AND FUNDING PLAN

Favorable Factors

1. Most respondents thought the total project cost seemed to be of value, citing the high cost of new construction and rising costs in Traverse City.
2. Many thought a combination capital campaign and millage was the best way to fund the project. They liked the "idea" of generating private support and minimizing the amount of taxes needed to cover capital costs.
3. Overall interviewees portrayed the community as having a "can do" attitude in terms of garnering financial support. Many pointed to specific examples of fund raising in the community, including the historical society and the high school weight room.
4. Most of those interviewed said they would be willing to financially support a library campaign at some level.
5. Many respondents indicated a willingness to provide volunteer support for a library project and campaign.

Unfavorable Factors

1. There was significant skepticism about the community's ability to raise \$400,000 in private support.
 - While most indicated some willingness to support the proposed project financially, the estimated giving levels were exceptionally low.
 - No pattern of major gifts was identified.
 - There was a perception that without significant support from an outside source, Fife Lake could not possibly afford the proposed project.
2. There was also significant doubt about the community's willingness to pass a millage.
 - Taxes in the area are already very high.
 - The community recently voted down a school millage by a overwhelming and historic majority.
 - A library millage vote could face potential competition from the senior center, fire authority, and the streetscape project.
3. Those who understood the relationship with TADL expressed a great deal of concern about the future of a new library in Fife Lake. There was much uncertainty about TADL's commitment to funding operations and capital for a new library in Fife Lake. The prevailing perception was that without TADL's continued operational support, the Fife Lake Public Library would face grave financial difficulties.

V. CONCLUSIONS

After careful consideration of the favorable and unfavorable factors identified during the interview process, The Breton Group has formulated the following conclusions:

- **Community members are positive about living in Fife Lake and believe the community is growing.** Residents describe the community as a friendly and welcoming place. They care about their community and are becoming more open to progress and change.
- **Residents are familiar with the Fife Lake Public Library and recognize the important role the library plays in the community.** Community members particularly appreciate quality services, the educational benefits the library offers children and the Internet services it makes available to all people. They are also particularly appreciative of the services provided through their relationship with TADL. Library users also value the service-oriented and helpful library staff members.
- **There was general consensus that a larger library would be a welcome and utilized community asset.** Most people recognize the space constraints in the existing facility and believe the greater community would support a project to improve and expand library space. Many agreed that a new library would be more accessible, could potentially attract a larger number of users, and would be a great investment and a source of pride in the community.
- **The community lacks information regarding the planning process and the project.** The planning process has been relatively quiet since the initial announcement, and community members were generally uninformed and felt surprised at learning the plan had reached this point. Limited communication has also led many to question what other options were considered and whether there is a better alternative to constructing a brand new facility. There were also unresolved questions about the possibility of combining a new library with the senior center.
- **There is significant concern over Fife Lake's future within the TADL organization.** There is uncertainty about becoming a branch library, but there is also a fear that if Fife Lake pursues a project of such magnitude without becoming a branch, it risks losing long-term operational support from TADL.
- **The size and scope of the project as presented is too large/too much.** While community members recognized the need for a larger library, the majority did not believe the need warranted a facility of the proposed size and cost.
- **Support for the project as presented is limited. However, the basis of community support to realize a larger library does exist, provided library leadership clearly communicates and educates the community regarding the needs and the project and presents a reasonable, revised plan.** Community members indicated that they will support and financially back a project that is appropriately scaled to address community needs.

- **There was substantial doubt about the community's ability to raise \$400,000 in private support.** All interviewees agreed that a combination capital campaign and millage was the best way to fund a library project; however:
 - There was an overall skepticism about the community's ability to fund a project of this size, due to its perceived limited financial resources and lack of identified pattern of major lead gifts.
 - There is concern about the broader community's willingness to approve increased millage. Area taxes are already very high and community members are particularly sensitive to tax issues, as evidenced in the recent failure to pass the school millage.
 - Private gift potential for a Fife Lake Public Library project was determined to be in the range of \$100,000 to \$150,000.
- **Major financial gifts, from outside sources, will be imperative to the success of a library project in Fife Lake.** Without significant support from an outside source, it may be impossible for Fife Lake to fund a project of the proposed size. Early major gifts from a foundation(s), individual(s), family(ies) and/or business(es), will be critical to building momentum and setting the tone for giving within the Fife Lake community.

VI. RECOMMENDATIONS

It is the opinion of The Breton Group that the Fife Lake Public Library does have an opportunity to realize its vision for a new library facility. Utilizing the information found in this report, we recommend that Fife Lake Public Library leadership follow these steps to secure funding for a new library facility:

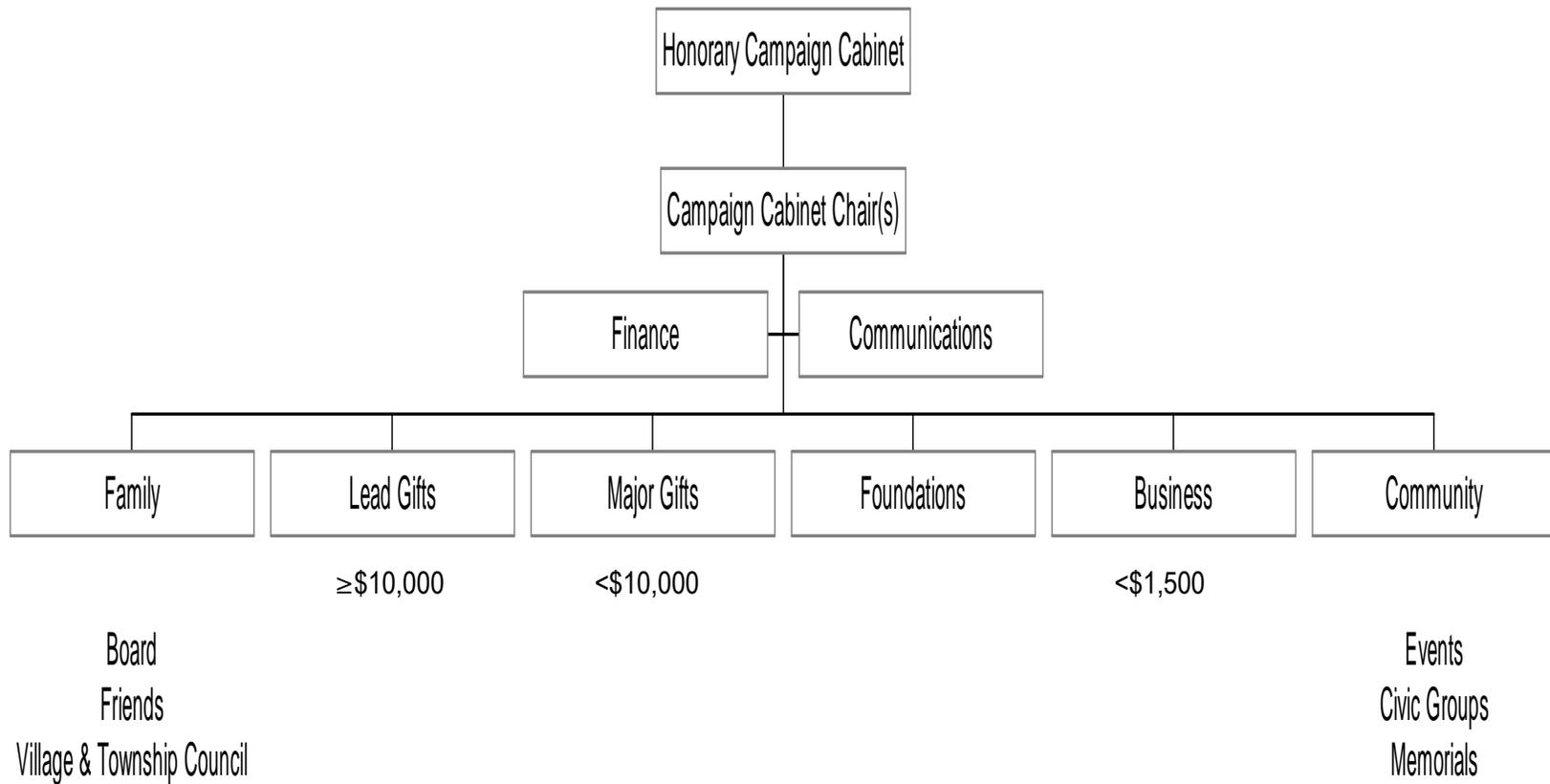
1. **Seek a long-term contract/relationship with TADL for operational support.**
Determine, with the TADL Board, the future of the Fife Lake Public Library in the TADL organization. Decide branch status and develop a detailed plan for long-term operational costs that will be provided by the district library. Retain a commitment for long-term support that will allow Fife Lake to continue planning for the future with confidence in its financial stability and funding structure.
2. **Complete the planning process by organizing a steering committee** to assist in raising visibility in the community and leading the project toward a funding campaign. The committee should be comprised of representatives from the current board, Friends of the Library as well as the broader community. The steering committee would be responsible for the following:
 - Engaging broad community involvement.
 - Initiating and maintaining communications.
 - Revising the scope of the project and reducing costs to a level perceived as acceptable and appropriate to meet current and future needs.
 - Organize a building sub-committee to review the current plan, study alternatives and make recommendations on how to move forward. Identify and evaluate alternatives to the proposed plan, including:
 - Phasing the project with a smaller initial phase and provisions for future expansion.
 - Research and evaluate other building options, including expansion of the current library and renovation of/relocation to an existing facility. Clearly communicate to the community what options have been considered, the resulting decision and the reasons behind that decision.
 - Developing a funding plan based upon the revised project costs. The funding plan should include both private and tax generated revenue. The private fund raising goal should be established after early conversations with local and regional “major gift” candidates to determine the level of support. A challenge gift or grant from a regional foundation or family in the range of \$100,000 could provide a very real catalyst to the community campaign.

Other sources of campaign revenue could include the following:
 - Businesses, churches, civic groups, individuals and families.
 - Local and regional foundations.

- Gifts-in-kind donations from local trades and suppliers.
 - Townships outside the TADL district that are served by the Fife Lake Public Library. Even modest commitments from these townships would be an enormous addition to the campaign effort.
 - Balance to be determined and possibly funded through millage, after successful completion of capital campaign.
 - Developing general campaign and project timetables.
 - Obtaining formal approval from TADL, township and village leadership.
3. **Initiate a comprehensive communications effort** to educate and engage all potential library constituencies. Establish a sub-committee of volunteers who would see the project through to its completion. The goal will be to raise the library's visibility in the community and to make every Fife Lake area resident, users and non-users alike, aware of the current issues facing the library and the short- and long-term benefits associated with the project. Areas to highlight should include:
- The responsible planning, the community's participation, and the exciting vision which led to the proposed project, stressing leadership's efforts to provide necessary and quality resources and services that will meet the community's needs for many years to come.
 - The benefits that the new library will provide for all area residents, especially children, through improved programs, technology and additional resources.
 - It will be vital to include townships outside of Grand Traverse that utilize the Fife Lake Public Library in your communications efforts. Educating these townships about the need for and benefits of a new facility can be the basis for expanded operational and capital support for the effort.
 - The opportunity for the community to take a step forward, create positive change, and work together on a project that has the potential to build community pride.
4. **Authorize the Friends of the Fife Lake Public Library to initiate and lead a community-wide capital campaign** to educate the community about the library project, engage the participation of community volunteers and generate necessary financial support.
- An initial step in the capital campaign is to form a planning sub-committee comprised of current board members, Friends, library supporters and representatives of a broad cross-section of the community to:
 - Identify and recruit campaign leadership. Attention should be paid to the diversity in the area, including representation from long-time and newer members of the community, parents of young families and seniors. Other areas of the community from which to draw leadership include:
 - Agriculture
 - Government

- Education
 - Business
 - Potential major gift donors
- Develop a case for support that clearly articulates how the proposed project will improve library services and resources for the community it serves. Keep in mind that many of the residents who will be asked to participate are not necessarily knowledgeable about the library and its role in the community.
 - Include in the campaign plan adequate budget support, clear lines of accountability to the community, a realistic solicitation timeline, and a distinct delineation of roles for board members, Friends, campaign leadership and volunteers.
 - Concentrate early campaign activity on the cultivation and solicitation of leadership gifts from individuals, businesses and a select number of foundations. These efforts should also include cultivation and solicitation of potential funding sources outside of Fife Lake.
 - Design the plan to accommodate memorial and commemorative gift opportunities (special naming opportunities of rooms or areas in the new facility) and a gifts-in-kind strategy for local suppliers and trades people.
 - Finalize and approve a campaign plan (strategies). Consider offering a five-year pledge program.
 - Develop a variety of ways to give all members of the community an opportunity to place a family name within the new building. Variations on the theme of “buy-a-brick” can be most effective at garnering financial and emotional support for the project. With proper cultivation and ongoing education, campaign donors can become lifelong library supporters.
 - Although the new library building will be a centerpiece for library services, leadership should make every effort to present a vision for the future of the entire area. The library project could be a catalyst to additional programmatic and economic enhancements to the area.
5. **Schedule a millage vote** toward the end of the capital campaign when momentum is high, the community has been adequately educated and engaged, and constituents are excited about the project and prepared to approve the necessary millage to complete the project. Timing in relation to other community projects/issues will be key to a successful millage.

VII. PROPOSED CAPITAL CAMPAIGN ORGANIZATION CHART



VIII. PROPOSED CAPITAL CAMPAIGN TIMELINE

Given successful completion of the recommendations regarding determining a long-term relationship with TADL, revising the size and scope of the project to reduce costs and initiating a comprehensive communications effort, Friends and staff may begin campaign planning.

MONTHS 1-4

- Determine campaign plan.
- Establish campaign timeline.
- Revise case statement.
- Identify and recruit campaign leadership.
- Identify and recruit communications committee.
 - Determine campaign theme and logo.
 - Begin working on printed materials.
- Identify and recruit campaign cabinet.
- Review and approve campaign budget.
- Determine campaign goal.
- Develop campaign gift chart.
- Develop commemorative/memorial giving opportunities, a gifts-in-kind strategy, and a donor recognition policy.
- Obtain financial commitments from leadership, Friends, staff and campaign cabinet.
- Begin planning family, lead and major gift divisions' strategies.
- Identify family, lead and major gift prospects.
- Identify major challenge gift prospect (foundation or individual).
- Begin cultivation of key major gift prospects.

MONTHS 5-7

- Identify and recruit divisional committee members.
- Finalize and produce printed materials.
- Obtain financial commitments from campaign divisional volunteers.
- Train family, lead and major gift volunteers.
- Initiate family, lead and major gift strategies.

- Review foundation list.

MONTHS 8-10

- Continue communications efforts.
- Finalize family, lead and major gift divisions' solicitation.
 - Review solicitation results and determine appropriate follow-up strategies.
- Identify business prospects.
- Identify community division strategies.
- Train business division volunteers.
- Begin preparation of foundation proposals.
- Initiate business solicitation strategies and events.
- Continue communications efforts.
- Begin community division activities and events.
- Finalize business solicitation.
 - Review solicitation results and determine appropriate follow-up strategies.
- Begin submission of foundation proposals.
 - Follow-up on foundation proposals, as appropriate.
- Finalize community division activities.
 - Review results and determine the need for additional activities.
- Begin planning for a millage vote (if deemed necessary).
- Conduct appropriate volunteer/donor recognition/appreciation ceremonies.
- Verify donor records.
- Identify strategies for:
 - Staying in touch with donors and volunteers.
 - Encouraging continued financial support.
 - Communicating with the community regarding library programs and building project progress.

CELEBRATE THE SUCCESSFUL CONCLUSION OF THE CAPITAL CAMPAIGN!

156 WEEKS (3 YEARS)

- Implement and maintain donor reminder system.

IX. PROPOSED CAPITAL CAMPAIGN BUDGET COMPONENTS

A capital campaign budget should be developed for approval by library leadership. It should not exceed eight to ten (8-10%) percent of the total project goal and should include the following:

- Campaign materials
 - Printing of all campaign materials: letterhead, envelopes, pledge cards, return envelopes, brochure, Q&A, display boards, video, etc.; three issues of a campaign newsletter
- Education/awareness activities
 - Hospitality for meetings, room rental, donor cultivation, special events, special equipment, honorariums, volunteer training materials
- Campaign counsel (optional)
 - Fee for consultant retained to assist with the campaign
- Office expenses
 - Copying, incidental printing, etc.
- Postage
 - All campaign mailings, including donor acknowledgments and newsletters
- Donor/volunteer recognition
 - Permanent donor recognition and volunteer appreciation activities
- Contingency
 - Overages in other areas of the budget

X. INTERVIEW CANDIDATES

INTERVIEWEES

Mae Anderson
Ruth Ann Berry
Linda Bridson
Noreen Broering
Ron Broering
Jim Chase
Dan Ellis
Corey Geyman
Pat Gibson
Zelda Gill
Julie Gray
Jim Hayes
Maxine Houts
Betty Huff
Fred Joles
Rodney Larr
Toni Larson
John Lehn
Stacy Mathia
Lois Runkel
Chris Seeley
Julie Smith
Betty Tornow
Pastor Bruce VanDussen
Art and Bea VanEck
Marie Voice

UNAVAILABLE

Dan Morton