

THE BRETON GROUP

Development Consulting for Non-Profit Organizations

FINAL REPORT

FEASIBILITY STUDY REPORT FOR TRAVERSE AREA DISTRICT LIBRARY – KINGSLEY BRANCH

Prepared for:

Traverse Area District Library Board of Directors and
Friends of the Kingsley Branch Library

Prepared by:

The Breton Group, Inc.

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I. BACKGROUND INFORMATION

PURPOSE OF THE STUDY

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

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

- Awareness of the Kingsley Branch Library and the proposed construction project:
 - Knowledge of the library and the current status of its use.
 - Knowledge of current programming and services.
 - Awareness of the need for additional and improved space.
 - Knowledge of the plan to build a new library facility in the community.
 - Awareness of the different constituent groups and their support for and/or use of the Kingsley Branch Library.
- The potential to secure \$300,000 in private support and \$691,500 in millage 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 lead gifts prospects.
 - Appropriateness of campaign timing, relative to other community fund raising activities.
- Potential level of project support:
 - Assessment of the community's attitude toward the proposed campaign.
 - 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 participate in a capital campaign, to provide leadership and financial support.
- Advisability of a major capital campaign 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 Friends of the Kingsley Branch Library and TADL board members.
 - Determination of potential interview candidates representative of the Kingsley 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 Kingsley Branch Library proposed capital 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 Kingsley Branch Library *does have the potential to realize its vision for a larger library facility*. Kingsley residents appreciate the library and are generally aware of the critical need for additional and improved space. These factors, among others, have led community members to indicate a willingness to support a library project. However, continued work to revise and refine the final plan and further education in the general community are necessary prior to initiating a capital effort.

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, at this time, include:

- A “disconnect” between perceived community library needs and the size and scope of the proposed project.
- The perception that the building design is too extravagant and, therefore, the resulting project costs are too high for the Kingsley community.
 - There was concern that the community does not have the necessary experience or financial/volunteer resources to conduct a \$300,000 capital campaign.
 - There was skepticism about the broader community’s willingness to approve a bond issue/millage request due to the area’s high sensitivity to increased taxes.

It is The Breton Group’s further judgment that moving forward, at this time, with the project as currently proposed is not in the best interest of the library or the community. While current private gift potential is limited, we believe library leadership has a good opportunity to significantly raise potential support for the project by closely following the recommendations outlined in this report.

Prior to initiating a building project, it will be vital for library leadership to clearly communicate the need to the community, refine the plan to a level that is acceptable and appropriate, and communicate how the plan meets community needs. If library leadership succeeds in creating a reasonable plan, raising awareness, engaging the general community, and increasing ownership in the project, it is our belief that the community will rally to support a capital project.

In conclusion, the Kingsley community is a small rural town facing and reacting to significant growth within Grand Traverse County. A successful library project has the potential to elevate community expectations and aspirations, to show that progress is desired, and to pave the way for addressing other important community needs. In addition, both the success of the library campaign and a new state-of-the-art library will benefit area residents for many years to come.

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 Kingsley Branch 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.

COMMUNITY

Favorable Factors

1. Interviewees described the Kingsley community as a fast-growing bedroom community, characterizing it with such terms as “comfortable,” “friendly,” “close knit,” “laid back,” “simple,” “small town feeling,” and “...becoming more progressive.”
2. Many commented that the Kingsley community is very committed to its school system and that education and sports are an important part of community life.
3. Interviewees appreciated and had faith in township and village leadership.
4. Most respondents viewed the local economy as relatively good and steady.

Unfavorable Factors

1. There were a number of comments and concerns about growth in the community.
 - Some were concerned that the type of growth Kingsley seems to be experiencing appears to be oriented toward low-income or young families.
 - There was a perception among interviewees that many old-line families prefer that the community retain its simple lifestyle and small town feeling, while many newcomers would like to see progress and new, improved services in the township. This constitutes an underlying friction about new projects like the proposed library building.
 - Many were concerned about the lack of a cohesive plan for managing growth and development in the area. Some indicated that growth on the hill is threatening the potential of a strong downtown area.
2. Interviewees pointed out that most residents work outside of Kingsley and are not strongly connected to the community. Very few people have extra time to take an active interest in community projects.

LIBRARY

Favorable Factors

1. Most interviewees were at least somewhat familiar with the Kingsley Branch Library and its programs and services.

2. Many respondents recognized the importance of the library in the community and noted their appreciation and fondness for the programs it offers, especially for children and seniors.
3. Library users expressed great appreciation and respect for the library director and the entire staff. Many commented on their friendly service and their willingness to go out of their way to help patrons. A significant number commented on the staff's ability to provide quality service and programs despite the cramped conditions created by the building's limited space.
4. All those who were familiar with the library recognized current space constraints and pointed out the library's need for additional and improved space.

PROPOSED PROJECT

Favorable Factors

1. Interviewees commented positively about library leadership's decision to conduct the feasibility study prior to moving forward with a project, expressing appreciation for the opportunity to have direct input into the library project.
2. Many were excited about the design of the new facility. They were also supportive of the proposed downtown location near the park and post office.
3. Many believed the new library would be a welcome addition to the community and that it would be heavily used by area residents.
4. Several thought a community meeting room in the new building could be a positive thing for the entire community. Some mentioned the hope that township and village officials would be able to take full advantage of the library's meeting room, therefore, minimizing the need for space of their own.

Unfavorable Factors

1. The majority of interviewees questioned the proposed size of the new facility (5,200 square feet) and felt it was much larger than what the community actually needs.
2. Some respondents questioned what other options, besides new construction, had been explored. A number specifically mentioned the Baptist church and wondered if the library had researched purchasing and renovating it.
3. There was some concern about the perceived lack of parking in the proposed plan.

COST AND FUNDING PLAN

Favorable Factors

1. Many thought that the combination of a capital campaign and a millage campaign was the best and only way to fund the project. They liked the "idea" of generating private support and garnering community involvement/ownership for the project prior to initiating a millage vote.

2. The majority trusted those involved in the planning process and believed they were good candidates to lead the project.

Unfavorable Factors

1. Most respondents thought the total cost was substantial and many perceived square footage construction costs to be too high.
2. While many liked the “idea” of generating private support for the project and felt it was necessary, there was some skepticism surrounding the community’s capacity to afford and raise the proposed \$300,000.
 - Many pointed out that the Kingsley community is inexperienced in raising this kind of money locally and currently is not prepared to take on such an ambitious campaign.
3. Many commented that taxes are already high in Kingsley, leading them to be skeptical about the community’s willingness to pass a capital millage.
4. The timing of library fund raising (especially the millage) in relation to upcoming infrastructure issues in the township and village would have a significant impact on its potential for success.
5. While most indicated some willingness to support the proposed project financially, estimated giving levels were exceptionally low and there was no identified pattern of major or lead gifts.
6. Interviewees indicated that volunteerism in the community is very low and many felt it might be difficult to find good an adequate volunteer base for a campaign.

V. CONCLUSIONS

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

- **Kingsley is a comfortable, growing small-town bedroom community.** While residents seem to enjoy living in Kingsley, most newcomers do not seem to have a strong connection to the community and do not take an active role in its development because of their busy lifestyles.
- **There are mixed opinions about the growth of Kingsley.** Some were supportive of change and improvement in the township, but others viewed the growth and change negatively. Regardless of opinions on community growth, there was a general concern among most about the lack of a visible cohesive plan to manage area growth.
- **Many Kingsley residents are familiar with the Kingsley Branch Library and recognize the important role it plays in the community.** Library users appreciate the library director and staff and view them as helpful and friendly.
- **Those familiar with the library recognize the need for additional library space and believe something must be done to address the need.** Most agreed that the current facility does not provide sufficient space to meet community needs and were supportive of a project to expand library space.
- **Support for the project as presented is limited.** However, community support for a larger library does exist, *provided* leadership addresses community concerns and presents a reasonable plan. Community members indicated that they will support and financially back a project that clearly demonstrates how it will address community needs.
- **The size and scope of the project as presented is perceived to be too large for the Kingsley community.** While community members recognized the need for a larger library and liked the design of the facility, the majority did not believe the need warranted a facility of the proposed size and cost. There were questions about whether library leadership explored other options to meet space needs.
- **The total cost seemed prohibitive and there was substantial doubt about the community's ability to raise \$300,000 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 doubt about the community's ability to fund a project of this size, due to its perceived limited financial resources and its lack of experience with large fund raising projects.
- **Kingsley residents have a high sensitivity to raising taxes** – Taxes are already high and residents are already paying millage to TADL. There was skepticism about the broader community's willingness to approve increased millage.
- **Current private gift potential is limited, however, it could be raised significantly** if library leadership clearly communicates the need to the community, revises the plan appropriately, and communicates how the plan meets community needs. If library leadership can raise awareness and engage the general community, increasing ownership in the project, the community will respond in turn with financial support.

VI. RECOMMENDATIONS

It is the opinion of The Breton Group that the Kingsley Branch Library has an exciting opportunity to realize the vision of a new library facility. Utilizing the information found in this report, we recommend that Kingsley Branch Library follow these steps to secure funding for a new library:

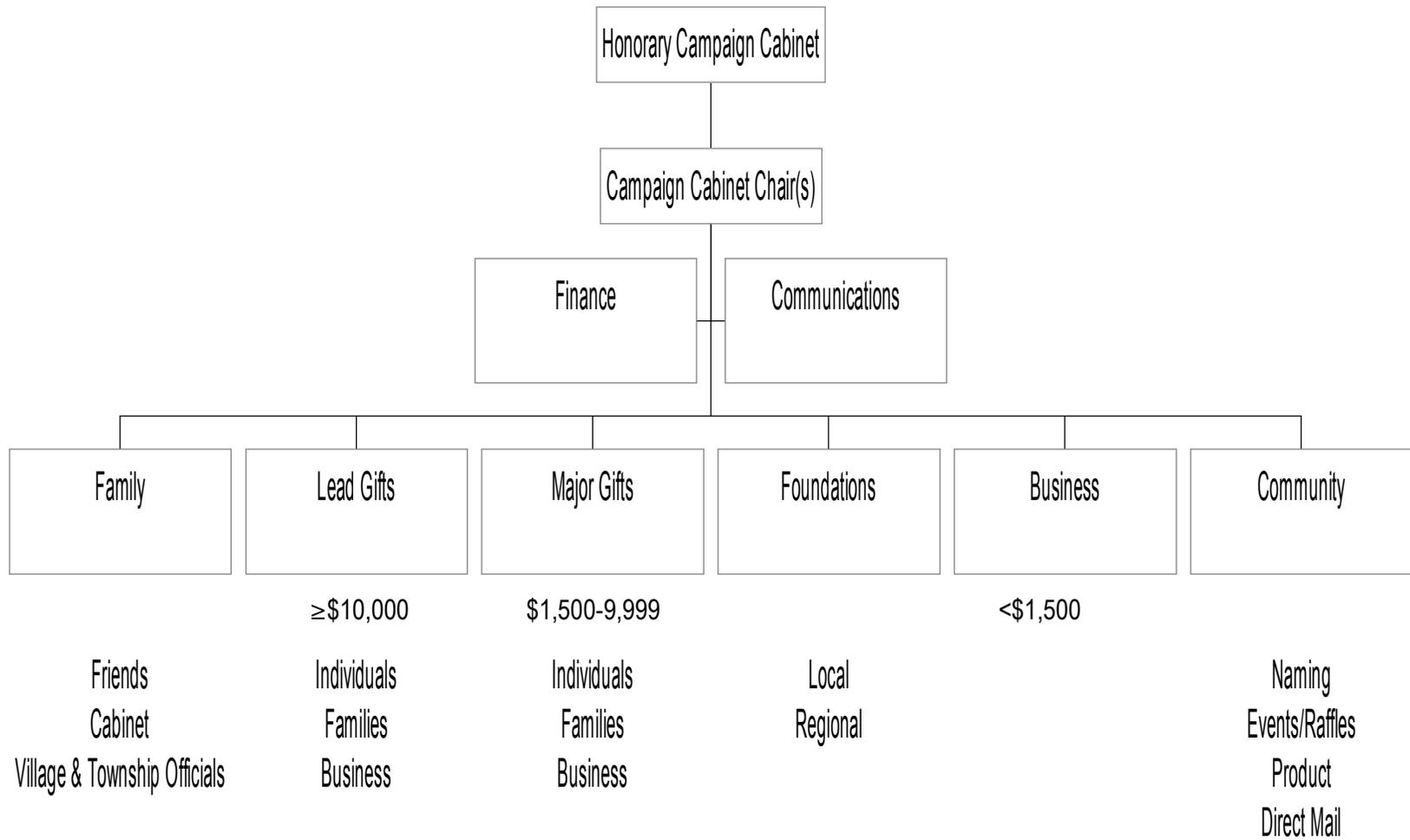
1. **Communicate to all library constituents the results of the feasibility study** and what the next steps will be. It will be particularly important to convey projected outcomes of the new library to those who participated in the feasibility study and to community leaders. Emphasize the library's accountability to the community—you have listened and are acting on the input received.
2. **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 Kingsley 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 conservative approach, 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 and additional resources.
 - The opportunity for the community to take a step forward, create positive change, work together on a project that has the potential to build community pride and *demonstrate that it can be the forerunner to other necessary community projects.*
3. **Revise the scope of the project to a level perceived as acceptable and appropriate to meet current and future needs.** Identify and evaluate alternatives to the proposed plan, including:
 - Phasing the project with the initial phase consisting of a building of approximately 3,000 square feet (with provisions for future expandability of an additional 2,000 to 3,000 square feet).
 - Consider the community room as an addition that could be underwritten by the village and townships.
 - Reevaluate the Baptist church and other options and clearly communicate to the community why these are not the most viable solutions to meet community library needs.
4. **Reduce the overall cost of the project to reflect the community's preference for a more modest approach and to enhance the project's potential for success.** Clearly communicate the details of the revised cost to all constituents and show how a larger facility will result in enhanced programs, services and resources to the community.

5. **Work with community leaders to position the library project as part of a total effort to improve the community’s overall quality of life and educational opportunities.** Soliciting early public support from community and governmental leaders will lend credibility to the project and will demonstrate that community leadership is working together to make the Kingsley area a better place for everyone. Village leadership needs to articulate how the new facility and location will complement the community’s “Master Plan.”
 - Village and township leadership need to clearly articulate their facility needs and how the library plan complements those needs.
 - ***Consider positioning the project to focus on the new library as a community center.*** Work with municipalities to gain their support and backing for a community meeting room in the new facility that can be used to meet the needs of township leaders and community groups. Stress the collaborative efforts that will result from this new facility.
 - ***Emphasize the potential that this project has to serve as a catalyst for growth in the entire downtown retail area.*** Work with township leaders to make the library project a first step in an organized plan for managed growth. Position the library project as a first step in revitalization of the downtown area.
6. **Revise the funding plan** for the new library to increase the potential for success and to develop a climate of enthusiasm and positive thinking. Elements of the plan should include:
 - Private contributions from:
 - Individuals
 - Families
 - Local and regional businesses
 - Local and regional foundations
 - Contributions from village and township
 - Bond issue to fund the balance
7. **Clarify the specific details of the financial role TADL will play in the construction project and in providing future operational support.** This should include greater detail on the building lease arrangements.
8. **Review the entire building and funding plan with TADL and village and township officials and seek their formal support to proceed.**
9. **Initiate a community-wide capital campaign** to educate the community about the library and the project, engage the participation of community volunteers, generate significant financial support and set the stage for a successful millage.

- An initial step in the capital campaign is to form a campaign cabinet comprised of current Friends, staff and representatives of a broad cross-section of the community to:
 - Identify and recruit campaign volunteers. 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
 - Create a campaign plan that focuses on completing the funding package for the new library by engaging participation and financial support from all residents of the area including potential major gift donors, businesses, and all individuals, and from local and regional foundations.
 - 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 campaign leadership, Friends and volunteers.
 - Seek a major challenge grant from a foundation or individual to serve as a catalyst for community involvement. An early challenge grant will begin to build momentum and help set the tone for a positive and successful campaign.
 - Concentrate early campaign activity on the cultivation and solicitation of leadership gifts from individuals, businesses and a select number of foundations. Their early gifts to the effort will lend significant momentum to the campaign, and give confidence to the broader community that the project will succeed.
 - Design the plan to accommodate memorial and commemorative gift opportunities (special naming opportunities of rooms or areas in the new facility).
 - Develop a gifts-in-kind strategy for local suppliers and trades people to participate.

- 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 downtown retail area. *The library project could be a catalyst to additional programmatic and economic enhancements to the area.*
10. 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.

VII. PROPOSED CAMPAIGN ORGANIZATION CHART



VIII. PROPOSED PRELIMINARY CAPITAL CAMPAIGN TIMELINE

Given successful completion of the recommendations regarding developing and implementing a communication program, revising the size and scope of the project to reduce costs and engaging early support from township and school officials, Friends and staff may begin campaign planning.

MONTHS 1-3

- 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.

MONTHS 4-6

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

MONTHS 7-9

- 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.
 - Identify challenge grant prospect (foundation or individual).
 - Request challenge grant.
 - Establish challenge grant parameters and reporting guidelines.
- Train business division volunteers.
- Begin preparation of foundation proposals.
- Initiate business solicitation strategies and events.

MONTHS 10-12

- 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 proposal, as appropriate.
- Finalize community division activities.
 - Review results and determine the need for additional activities.
- 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 GIFT CHART

\$300,000 GOAL

Gift (\$)	No. of Gifts	Subtotal(s)	Cumulative Total
<u>Tier 1</u>			
\$30,000	1	\$30,000	\$30,000
\$25,000	1	\$25,000	\$55,000
\$20,000	2	\$40,000	\$95,000
<u>Tier 2</u>			
\$10,000	5	\$50,000	\$145,000
\$7,500	8	\$60,000	\$205,000
5,000	10	\$50,000	\$255,000
1,000	15	\$15,000	\$270,000
<u>Tier 3</u>			
\$500	30	\$15,000	\$285,000
\$250	40	\$10,000	\$295,000
\$100	50	\$5,000	\$300,000
162			

X. PROPOSED CAPITAL CAMPAIGN BUDGET COMPONENTS

A capital campaign budget should be developed for approval by library leadership. It should not exceed ten to fifteen (10-15%) 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

XI. INTERVIEW CANDIDATES

INTERVIEWEES

Rod and Barb Bogart
Don and Cathie Bott
Phil and Julie Case
John Conroy
Steven and Lynn Derr
Char Doty
Sallie Hoeflin
Dick and Cindy Hood
Ardella Hoyt
Jerry and Carol Inman
Bob Mitchell

Jack and Brenda Ocobock
Bill and Maxine Revett
Debbie and Tom Schneider
Cliff and Marie Sedlacek
Heather Smith
Dave and Vivian Snyder
Don and Ruth Sterzik
Geoff Stieler
Patty Summerfield
Chum and Donna Vouge

UNAVAILABLE

Rob and Lori Bach
Bonnie Baughn
Bob Brown
Dennis and Ann Covell
Paula and Dale Dankert
Tom and Chris Durfee
Jack Gallon
Lynn and Steve Hays
Jeff and Denise Joppich
Tim Lueck

Mike and Mary McCumby
Pete and Vera Nickerson
Sterling and Karen Nickerson
Virginia Olds
Frank and Doris Rawlings
Brenda Rice
Kent Stiner
Jim and Cheri Tuller
Tim Wicksall

