

Appleton Public Library Campaign Feasibility Study Presentation of Findings and Recommendations

March 15, 2022



K.ROSE
FUND DEVELOPMENT

Methodology

- Karen Rose and Sharon Griggins interviewed **30** individuals for this study.
 - 24 potential *individual* donors
 - 6 potential *institutional funders*
- Interviews were conducted December, 2021 through January, 2022.
- 20 interviews were conducted in-person; 10 interviews were conducted via video or phone.



Findings

Perceptions of APL and FAPL

- The Library and The Friends are highly respected organizations with strong staff and governing leadership.
- Many potential donors are not active users of the Library with outdated perceptions of today's library services.

Representative Comments:

- *APL is perceived as a leader among public libraries in the area; it sets the standard and is the most active.*
- *There is a divide within the community where the library is concerned. People either use it and appreciate the resources it provides or don't use it and feel it is a waste of money.*



Findings

Need for Investment in the Library

- Most believe investment in the Library is long overdue.
- Three viewpoints:
 1. No one uses libraries anymore; they house books which can be accessed online.
 2. Libraries are necessary to provide resources to low-income citizens.
 3. Libraries are essential to a community's future development, providing education and skill building services as well as a gathering space for community building.



Findings

Vision for Downtown Revitalization

- Most interviewees are optimistic about the vision to revitalize the downtown neighborhood.
- Even amongst those who supported the “bluff site” project, all recognize that renovating the existing building is the right thing to do.

Representative Comments:

- *The Library will be a catalyst for DT development; it's an anchor and will have a multiplier effect. However, that is not the reason donors will fund this. Donors will give because of the access divide and the need to provide access, tools and resources to bridge the economic divide.*
- *The new vision is not very well-known and it has been such a long and winding story that it's hard to keep up. I'm very involved and aware and even I'm sometimes confused.*



Findings

Building Design

- Most appreciate the reuse of the existing building as a responsible approach to sustainability.
- Perceptions of the overall design are very positive.
- LEED certification is important to some but not worth the cost to others.

Representative Comments:

- *Staying and reusing the current building shows good stewardship; it feels like the responsible thing to do.*
- *LEED certification is too expensive to pursue; there are still energy efficient options without going for certification.*



Findings

Campaign Potential

- Appleton is considered a very generous community with strong philanthropic capacity.
- \$12 million is considered attainable by some but a stretch by others.
- Some raised concern about attracting donors for a municipal project.
- A significant lead gift of \$3 million alters the potential for success and makes \$12 million much more attainable.
- With 21 indicating their likely level of giving, the study identified over \$9.5 million in potential support, or 80% of the goal. This is a strong indicator of potential campaign success.
- 4 potential major donors indicated gifts over \$1,000,000.



Findings

Campaign Potential

GIFT \$

POTENTIAL DONORS

\$3,000,000

1

\$1,500,000

2

\$1,000,000

1

\$ 500,000

3

\$ 300,000

2

\$9,100,000

9



Findings

Potential Challenges

- Many were concerned about the transit center and would like to see a solution as part of this project.

Representative Comments:

- *There is some tension with the transit station; however inclusivity is important.*
- *Many people are afraid to use the library because of security issues.*



Findings

Campaign Leadership

- The study identified # potential campaign leaders. Successful campaign leaders are:
 1. Passionate about the Library
 2. Able to articulate the vision of the Library as a valuable community asset
 3. Highly respected by potential major donors and the community
 4. Able to drive the solicitation of the top 30 donors
 5. Serve as ambassadors and spokespersons for the campaign
 6. Maintain the highest levels of confidentiality, collaboration, teamwork and enthusiasm for the campaign



Recommendations

Criteria for a Successful Campaign:

- Favorable views of the institution(s)
- Compelling case for support
- Adequate source of contributable funds
- Strong and enthusiastic institutional leadership
- Influential campaign leadership
- Sense of urgency
- Campaign timing



Recommendations

1. Proceed with plans to launch a \$12 million capital campaign

- A lead gift of \$3 million was identified and confirmed
- Potential to engage another \$6.5 million from individual donors and institutional grantors
- Study reveals that at least \$9.5 million, or 80% of the goal, is potentially available to the library



Recommendations

2. Define a compelling case for giving

- Develop a case for giving that encompasses the Library's multi-dimensional role in the community:
 - Equity and inclusion: access to technology, skill development and resources
 - Community center and catalyst for downtown revitalization



Recommendations

3. Create a marketing plan to update the Library's brand

- Increase the Library's visibility as a "community center" to attract donors who might otherwise not wish to engage in a library campaign.



Recommendations

4. Provide a solution to address the concerns regarding the transit center.

- Articulate a solid plan for addressing this safety issue. If possible, a solution should be embedded in the overall vision for the library project.



Recommendations

5. Adopt a campaign timeline of 12-18 months.

ACTIVITY	M	A	M	J	J	A	S	O	N	D	J	F	M	A
Campaign Organization	Grey	Grey	Grey	Grey	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue
Leadership Enlistment	Grey	Grey	Grey	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue
Materials Development	Grey	Grey	Grey	Grey	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue
Donor Mapping/Training	Light Blue	Light Blue	Light Blue	Red	Red	Red	Light Blue	Red	Red	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue
Awareness & Connection	Light Blue	Light Blue	Light Blue	Light Blue	Red	Red	Red	Red	Red	Red	Light Blue	Light Blue	Light Blue	Light Blue
Board Gifts	Light Blue	Light Blue	Light Blue	Light Blue	Yellow	Yellow	Yellow	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue
Top 10 Gifts Solicited	Light Blue	Light Blue	Light Blue	Light Blue	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Light Blue	Light Blue	Light Blue	Light Blue
Next 20-30 Gifts Solicited	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow
Community Phase	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Green	Green



Recommendations

6. Identify major donors and align giving potential with naming opportunities.

- Identify top prospective donors for the campaign
- Determine a specific gift amount for consideration by each prospect
- Recommend solicitation strategies for each prospect
- Map campaign solicitors to each donor
- Validate and/or revise the financial model as appropriate
- Provide a road map to achieve campaign objectives



Recommendations

7. Develop mid-level donor strategies for donors at \$25,000-\$100,000 range.

- Includes individual solicitations as well connecting to affinity groups throughout the community
- Personal invitations, presentations and scripted invitations to give



Recommendations

8. Build the necessary campaign management infrastructure to support the campaign.

- Build a campaign budget
- Hire part-time support staff
- Create job descriptions for volunteers and staff
- Develop campaign policies and procedures:
 - Acceptance of pledges and letters of intent
 - Acceptance of designated gifts
 - Naming rights
 - Duration of giving periods
 - Acceptance of gift types (securities, appreciated assets, deferred gifts, in-kind gifts, bequests, etc.)



Recommendations

9. Develop post-campaign donor stewardship plan.

- A campaign creates an opportunity to develop a deeper relationship with your donors. Create a plan and system to acknowledge, retain and continue to engage donors into the future.



Recommendations

Criteria for a Successful Campaign:

- ✓ Favorable views of FAPL and APL
- ✓ Compelling case for giving
- ✓ Adequate contributable dollars
- ✓ Strong and enthusiastic institutional leadership
- ✓ Influential campaign leadership
- ✓ Sense of urgency
- ✓ Campaign timing



Summary

- The results of this feasibility study indicate strong support among the potential donor population for this public-private library project.
- The identification of 80% of the campaign goal through these interviews suggests the potential for a successful \$12 million capital campaign.
- FAPL, APL and the City have done the groundwork to prepare the community for this campaign.
- Funding capacity and campaign leadership exists.
- There is a sense of urgency and energy to move forward. The timing and scope of this campaign is on target for Appleton at this time.



Thank you!

K. Rose is pleased to be part of this exciting journey for the Library and the citizens of Appleton. We are confident the community will support this vision for a transformative community space.



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