
Fundraising Feasibility Study Final Report

Prepared for the

Orillia Public Library
Orillia, Ontario

January 2006

Introduction

DVA Navion is pleased to present this Fundraising Feasibility Study Final Report to the Orillia Public Library.

The following report is an in-depth accounting of the results of the study, outlining our findings and recommendations. We have also provided details on the study process as well as a thorough description and analysis of the observations and findings in accordance with the information provided during 64 interviews with 73 individuals.

The primary goals in conducting this study were to:

- Gauge the current views of the community on the reputation and profile of the Orillia Public Library.
- Gather information on the amount of money that could be raised in support of the proposed new library.
- Assess the philanthropic intent of the community and the climate for fundraising at this time.
- Educate and engage the community about the Library as a philanthropic entity.
- Identify key issues, which might impact on a building campaign.
- Identify the potential level of volunteerism and prospective leadership for the campaign.
- Identify possible sources for lead and major gifts in the community.

Study Process

A Case Summary outlining the plans for a new library was developed by **DVA Navion** in consultation with the Study Committee. This document was mailed along with a letter of invitation to potential participants. These potential participants were identified by the Liaison Committee and selected to provide a statistically sound cross-section of key community opinion leaders. Personal interviews were then scheduled. A “discussion stimulant” was prepared by **DVA Navion** to guide the interview process and to ensure consistency in data collection.

Our recommendations are based on the themes and issues that emerged during our interviews and this information was combined with our experience in capital campaigns for a wide variety of organizations including libraries. This report represents **DVA Navion’s** professional judgement based on our extensive work in fundraising.

We have truly enjoyed our relationship with the Orillia Public Library and the Study Committee. We would like to extend a special note of appreciation to Tina for providing outstanding assistance in booking appointments. We also wish to thank all the individuals who gave freely of their time to assist the **DVA Navion** team and the Library with this study.

Respectfully submitted,
Chris Hobbs, CFRE
Senior Vice-President

Fundraising Feasibility Study Final Report

Prepared for the

Orillia Public Library
Orillia, Ontario

Table of Contents

| | |
|---|----|
| Introduction..... | i |
| Table of Contents..... | 1 |
| Executive Summary..... | 2 |
| Summary of Key Findings..... | 2 |
| Summary of Recommendations (refer to page 24 for further detail)..... | 3 |
| The Study..... | 4 |
| Findings and Observations..... | 5 |
| Background..... | 5 |
| Case for Support..... | 8 |
| Volunteer Leadership..... | 11 |
| Potential Donor Prospects..... | 12 |
| Evaluations and Recommendations..... | 19 |
| Financial Support for a Capital Campaign..... | 20 |
| Plan Evaluation..... | 21 |
| Leadership/Volunteer Evaluation..... | 22 |
| Prospect Evaluation..... | 23 |
| Plan Evaluation..... | 23 |
| Recommendations..... | 24 |
| Sample Campaign Timetable (15 months)..... | 26 |
| Appendices | |
| • List of Participants | |
| • Participation Request Letter | |
| • Case Summary | |
| • Questionnaire | |

Executive Summary

In October 2005, **DVA Navion** was contracted by the Orillia Public Library to undertake a Fundraising Feasibility Study to survey the community about plans to conduct a capital campaign for the development of a new library building to be located downtown within the Market Block, an area defined by the boundaries of West, Mississauga, Albert and Market Streets

The Study consisted of the development of a Case Summary reflecting the proposed plans. To generate feedback and discussion on these plans, **DVA Navion** met with a variety of individuals. A selection of internal stakeholders participated in personal interviews, including members of City Council, members of the Library Board, Library and City staff, Friends of the Library and other related parties. External community individuals representing community agencies, local businesses, service clubs and a selection of influential individuals participated in interviews with a **DVA Navion** representative.

In total, 73 individuals participated in the interview process and provided feedback on the plans for a new Library. Nine of those sessions were conducted with two participants. In most cases, these joint questionnaires are treated as a single participant. However, differing responses were recorded and are included in this report.

Participants provided commentary specific to the potential launch of a capital campaign as presented in the Case Summary. The results have been compiled and are presented here in this report.

Summary of Key Findings

- 78% of participants indicated that the library has a high or medium profile in the community
- 89% of study participants felt the Case Summary distributed in the study process was compelling and explained the need for a new library
- 84% of participants stated that they were in support of the plans outlined in the Case
- The Market Block/Three Jewels concept was cited as the most appealing aspect of the Case as well as its greatest strength from a fundraising point of view
- Identified concerns with regard to the Case included: the size of the facility, potential parking situation, de-shrouding of the current library and the aesthetic effect on the City
- Primary concerns regarding a potential campaign included: the MURF, hospital campaign pledge timing, donor fatigue and garnering full support of Council
- 88% ranked this as either high or medium priority in their charitable giving plans
- 90% indicated that they would financially support the program

- A total of \$589,000 in potential donations was identified from the 64 interviews
- A significant number of names were identified for potential gifts at the \$25,000+ level
- 47% indicated a willingness to volunteer for a campaign, while 52% indicated a willingness to open doors and/or make select solicitation visits
- 62 individuals were identified as potential candidates for taking on the role of Campaign Chair. Another 50 individuals were identified as potential campaign committee members
- 79% believe that a campaign of \$1.5-\$1.7 million is attainable
- The MURF was cited most often when questioned about the timing of a campaign, with most participants indicating that the campaign should not start until the MURF is completed.

Summary of Recommendations (refer to page 24 for further detail)

- Set campaign goal of \$1.5 million to be raised in 5-year pledges
- Time campaign to coincide with completion of the MURF campaign
- Accept a campaign timeline of 15 months
- Recruit a Task Force from the Library Board and Council to solidify Case
- Commence working on securing Provincial and Federal support
- Maintain and enhance media profile of the Library
- Put in place cultivation efforts for current donors, stakeholders and other literacy focused organizations
- Investigate potential alliances/support with Lakehead University
- Prior to campaign commencement determine (and secure where possible) all sources of funds (i.e. Federal, Provincial, Municipal and community campaign)
- Accept a phased approach to the campaign, initiating solicitation priority per financial capability
- Recruit a Campaign Director or utilize professional council on a full time basis to implement the campaign.
- Consider recruiting Campaign Co-Chairs to lead the campaign
- Send thank you and update letter to all Study participants

The Study

Findings and Observations

In this section of the Report, we provide a summary of our findings derived from 64 interviews conducted with 73 individuals. Nine sessions were conducted with two participants. In this situation answers were combined and a single common questionnaire was completed. For the purposes of compiling statistics, these joint questionnaires are treated as a single participant. Therefore, for this report there were a total of 64 participants.

Each participant was asked 22 common questions. Therefore, there were literally hundreds of views and opinions expressed. However, it should be noted that not every participant answered every question. Therefore, you will notice that the total number of responses for each question may vary depending on how many participants responded to that particular question. This will have an impact upon the results of those questions. To provide an accurate reading on each question, percentages are based on the total number of people who answered the question. These differences have been carefully factored into our calculations, observations and recommendations.

Section 1 Background

1. Background of the Interviewee

| Internal | | External | |
|------------------------|----|-----------------------|----|
| Library Board | 8 | Corporation | 1 |
| Friends of the Library | 9 | Financial Institution | 1 |
| City Council | 2 | Local Business | 9 |
| Library Staff | 4 | Service Club | 3 |
| City Hall Staff | 2 | Foundation | - |
| | | Individual | 16 |
| Committee | 2 | Government - other | 2 |
| Other | 1 | Other | 2 |
| Total | 28 | | 34 |

2. Do you or a family member currently use the services/programs/facilities at the Orillia Public Library?

| | Yes | No | Total |
|----------|----------|--------|-------|
| Internal | 24 – 92% | 2 – 8% | 26 |
| External | 29 – 91% | 3 – 9% | 32 |
| Total | 53 – 91% | 5 – 9% | 58 |

If yes, how would you describe the services/programs/facilities?

Internal Comments:

- Programs and services for children. (9)
- Over-crowded. (9)
- Excellent programs and services and resources. (8)
- Facility is old and outdated. Not up to date. (4)
- Need for databases and computers. (4)
- Under-used, under-staffed. (3)
- Good staff. (3)
- Excellent periodicals. (2)
- Positive and happy atmosphere. (2)

External Comments:

- Not enough room. (10)
- Excellent programs and services. (5)
- Need more books and other resources. Limited and out-dated collections. (3)
- Staff does an amazing job considering the difficulties they face. (2)
- Do we need this much more space.
- Under-used.
- Quick circulation.
- Not easily accessible.
- Good children's programs.
- Population is growing but library has remained the same.

DVA Navion Observations:

The sample of participants indicates a good cross-section of the community was represented in this study. An overwhelming number of participants indicated that they made use of library facilities or programs. It should be noted that the number of internal participants were weighted higher than usual and this may have some impact on the outcome of study results. However, this is balanced by the wider range of participants across community constituencies.

It is quite obvious in the comments that individuals recognize that the current library is undersized, rundown, limited and not easily accessible resources (collections) and could use significant improvements overall.

It must also be noted that individuals are quite impressed with the functioning of the library considering the limited space and environment. Strong credit should be given to the staff for this. As well, the Children's Program was cited quite often as a very positive attribute for the library.

3. How would you describe the Orillia Public Library in terms of profile in the community?

| | High | Medium | Low | Total |
|----------|----------|----------|----------|-------|
| Internal | 5 – 22% | 12 – 52% | 6 – 26% | 23 |
| External | 6 – 19% | 20 – 62% | 6 – 19% | 32 |
| Total | 11 – 20% | 32 – 58% | 12 – 22% | 55 |

Internal Comments:

- Good media coverage. (4)
- Good location. (2)
- Need to do more outreach in broader community. (2)
- Booth at mall and fairgrounds.
- Good reputation.
- Outdated facility.
- Has improved over the last few years.

External Comments:

- Good media coverage.
- Good location.
- Good connection with Opera House and Farmers Market.
- Well-used.
- Good support in city, less in surrounding communities.
- Well-regarded among seniors.
- Wait times are too long.

DVA Navion Observations

Commonly, internal participants are more likely to suggest the project has a higher profile than external participants, simply because of their familiarity. In the case of OPL, the findings are fairly consistent across the two groups. This suggests that the Library has a good profile throughout the community and this can serve as a positive indication of fundraising potential.

While excellent media coverage was often cited as a positive, it must be noted that most of this coverage is initiated by the library itself. Therefore, credit should be given to those involved in the communications and marketing efforts made to keep the library front and center in the community

Section 2
Case for Support

4. Having read the Case Summary, does it explain the need for a new main library in a compelling manner?

| | Yes | No | Uncertain | Total |
|----------|----------|--------|-----------|-------|
| Internal | 25 – 96% | - | 1 – 4% | 26 |
| External | 31 – 84% | 3 – 8% | 3 – 8% | 37 |
| Total | 56 – 89% | 3 – 5% | 4 – 6% | 63 |

DVA Navion Observations:

Reactions from participants were positive. As expected, the internal group was more supportive of the Case than external – however, the spread is not significant. Some individuals indicated the desire for more specific details and justification for the choice of location. The tone and approach, with a focus on the Market Square and Three Jewels theme, was a sound decision. The Case Summary should therefore serve as the foundation for the full Campaign Case with the addition of key details about the facility (i.e. construction, floor plans, funding budget, etc.) and rationale for location.

5. Would you consider yourself in support of these plans?

| | Yes | No | Uncertain | Total |
|----------|----------|--------|-----------|-------|
| Internal | 23 – 92% | 1 – 4% | 1 – 4% | 25 |
| External | 28 – 78% | 2 – 6% | 6 – 16% | 36 |
| Total | 51 – 84% | 3 – 5% | 7 – 11% | 61 |

DVA Navion Observations:

The plans, as outlined, received significant support from all participants. Overall, 84% indicated they supported the plan. Only 5% did not support the plan. Additional clarity in the Case document may help shift some of the uncertain respondents and increase support even more. It is important to remember that support of the “idea” does not necessarily translate into financial support. Therefore, ultimate success will depend on the ability to show that the plan is both appealing and worthy of financial support.

6. What appeals to you most about the plans?

Internal Comments:

- The development of the entire “block”; Three Jewels Concept. (16)
- Location is key. (10)
- Need more space for technology and services. (6)
- Great design. (3)

- Renovation of Carnegie Building. (3)
- New building will be more functional and attractive. (3)
- Emphasis on technology. (3)
- The place is a dungeon – we need better climate control, more space. (2)
- We need better services and this will achieve that.
- Services for those “in need”.

External Comments:

- Downtown focus. Link between Opera House and Market. (9)
- Good location. (5)
- Cultural centre. (3)
- Need more space. (3)
- Restoring the Carnegie Building. (2)
- The “Three Jewels” concept.
- Need a bigger reading room and staff room.
- Brings people downtown.
- Too costly to renovate current building.
- Questions about the size.

DVA Navion Observations:

Whether internal or external, the feeling among participants is equally positive on the downtown location and links with the Market Square. The Three Jewels concept, downtown core focus and downtown revitalization aspect were seen as the most attractive aspects of the Case. These elements must therefore remain central to the campaign communication effort.

7. In your opinion, what are the greatest strengths of the Library in terms of launching a Campaign?

Internal Comments:

- Focal point of community. Development of Square with Opera House and Farmer’s Market and restoration of Carnegie building. (11)
- There is a lot of public support, community awareness. Good core of supporters. (10)
- Civic Square idea – revitalization. Will provide economic impact. Will draw more people downtown. (10)
- Good reputation. (4)
- Great staff. (4)
- Allow for increased programming and services. Promotion of literacy needs. (4)
- New improved library – an essential service. (2)
- Friends of the Library for strong promotion.
- Desire to keep up with technology.

External Comments:

- Great staff. (4)
- Will provide economic impact. Will draw more people downtown. (3)

- Good location. Cultural Centre concept. (3)
- Farmer's Market and new Market building. (4)
- Good collections. (2)
- Large number of "literary" people in community. (2)
- Good reputation. Good support in the community. (2)
- Access to computer and internet.
- Promote children and education.
- Library is an essential service.
- Links to Lakehead.

DVA Navion Observations:

Again, the selected location for a new facility in the Market Square and the Three Jewels concept comes through loud and clear as being most attractive and the most positive element of the proposed project. This element is seen as key to facilitating a variety of other positive impacts (drawing pedestrian traffic, maintaining heritage property, etc.). Staff, programs, reputation and having a core group of supporters were cited quite often as strengths of the library.

8. Please state any factors you may be aware of that might hinder a Capital Campaign to provide community support for the new Library?

Internal Comments:

- MURF (19)
- Other campaigns. Donor fatigue. (11)
- Need full Council support. (9)
- Need to be flexible with other options. Issues surrounding the choice of location.
- More practical to buy another building and/or build a satellite facility.
- Planning may be over-optimistic.
- Let people know Farmer's Market is part of the plan.
- Core support is aging.
- Users are quiet compared to sports supporters.
- Doesn't appeal to youth as much as it should.
- Concern about rising costs affecting city taxes.
- Maintaining profile and interest.

External Comments:

- MURF (18)
- Hospital program and outstanding pledges. (7)
- Need full support of City Council. (4)
- Internet/computers reduce the need for libraries. (2)
- Is the size rational?
- Feeling that it is a city responsibility.
- Not sure if more space for IT is a good idea.
- Consider centralizing with schools.
- What about government funding?
- Other fundraising programs.

DVA Navion Observations:

In this question and in many others, the MURF was considered a significant factor that may impact on a potential campaign. Clearly, answering any outstanding concerns or issues related to this will be an important consideration when planning for a campaign.

Donor fatigue and/or the effect of MURF and the hospital campaign were also cited quite often. It is understood that the pledge period for the hospital is coming to an end. However, these projects continue to have a very strong fundraising presence/impact in the community.

Many participants mentioned the requirement for the full support of Council. It is not that Council is unsupportive, but rather that more education and evaluation of the project is being requested. Items such as size, location and parking still need to be addressed with Council.

**Section 3
Volunteer Leadership**

9. Please suggest anyone who, because of their community stature, leadership skills or organizational ability could lead this project to success?

A total of 64 names of individuals were suggested in response to this question. Due to the confidential nature of this information the names have been provided under separate cover.

10. If you were Chair of this program, who would you want on your team?

A total of 81 names of individuals were suggested in response to this question. Due to the confidential nature of this information the names have been provided under separate cover.

11. *Without making a commitment*, is this a project for which you would see yourself volunteering?

| | Yes | No | Uncertain | Total |
|----------|----------|----------|-----------|-------|
| Internal | 17 – 63% | 3 – 11% | 7 – 26% | 27 |
| External | 12 – 34% | 10 – 29% | 13 – 37% | 35 |
| Total | 29 – 47% | 13 – 21% | 20 – 32% | 62 |

DVA Navion Observations:

Seventy-nine percent of the participants stated Yes or Uncertain when asked if they would volunteer this project. This is a good response. We find that many Uncertain responses can become Yes’s once a campaign has begun and a well-defined job description is presented.

12. Would you be willing to visit some selected prospects or open doors to potential donors on behalf of the Orillia Public Library?

| | Yes | No | Uncertain | Total |
|----------|----------|----------|-----------|-------|
| Internal | 19 – 70% | 4 – 15% | 4 – 15% | 27 |
| External | 13 – 39% | 10 – 29% | 11 – 32% | 34 |
| Total | 32 – 52% | 14 – 23% | 15 – 25% | 61 |

DVA Navion Observations:

Seventy-seven percent (**Yes and Uncertain**) of respondents indicated that they would be willing to visit/open doors to select prospects for the campaign. Again, many Uncertain responses may become Yes’s once they are presented with clear request. These numbers are positive indicators.

**Section 4
Potential Donor Prospects**

13. Please identify any corporations, foundations or individuals whom you consider capable of making a gift of \$100,000 or more over a three to five year period?

A total of 62 names of individuals, businesses, corporations and foundations were suggested in response to this question. Due to the confidential nature of this information the names have been provided under separate cover.

- 13 a) Whom do you believe should be the “top 5” donors to this program.

A total of 20 names of individuals, businesses, corporations and foundations were suggested in response to this question. Due to the confidential nature of this information the names have been provided under separate cover.

14. Please identify any corporations, foundations or individuals whom you consider capable of making a gift of \$25,000 or more over a three to five year period?

A total of 51 names of individuals, businesses, corporations and foundations were suggested in response to this question. Due to the confidential nature of this information the names have been provided under separate cover.

15. How would you/your business/your organization look upon your overall charitable giving plans, in relation to this project?

| | High Priority | Medium Priority | Low Priority | Total |
|----------|---------------|-----------------|--------------|-------|
| Internal | 12 – 46% | 11 – 42% | 3 – 12% | 26 |
| External | 8 – 24% | 22 – 65% | 4 – 11% | 34 |
| Total | 20 – 33% | 33 – 55% | 7 – 12% | 60 |

DVA Navion Observations:

A response rate of 88% for High Priority and Medium Priority support for the project is excellent. Only 7 participants indicated a Low Priority for support.

16. Is this a Campaign you would be willing to support financially?

| | Yes | No | Uncertain | Total |
|----------|----------|--------|-----------|-------|
| Internal | 26 – 93% | - | 2 – 7% | 28 |
| External | 29 – 88% | 1 – 3% | 3 – 9% | 33 |
| Total | 55 – 90% | 1 – 2% | 5 – 8% | 61 |

DVA Navion Observations:

This is an excellent statistic as well. Only 1 individual indicated No when responding to this question.

17. In order for **DVA Navion** to accurately predict the amount that can be raised in philanthropic support for the Library, we ask each person to take a moment to reflect on the level of support they might consider for this important cause. *Without committing yourself*, is there a category on this chart that would reflect the amount of support you would consider over a period of **three to five** years?

| Category | Amount | |
|----------|---------------|----|
| A | \$ 1 million | |
| B | \$ 500,000 | |
| C | \$ 250,000 | |
| D | \$ 100,000 | 1 |
| E | \$ 50,000 | 1 |
| F | \$ 25,000 | 8 |
| G | \$ 10,000 | 7 |
| H | \$ 5,000 | 9 |
| I | Up to \$5,000 | 24 |
| | | |
| | \$1,000 | 2 |
| | \$2,500 | 1 |

DVA Navion Observations:

Although participants are often quite reluctant to express a potential gift amount when asked this question, the responses provide a good indicator of potential support for the campaign and allow us to accurately estimate a financial goal. It is very encouraging that a large number of participants in this study were willing to offer a personal response to this question. This may be a significant indicator of overall community participation potential in a campaign. In total, an amount up to \$589,000 in potential donations was identified.

**Section 5
The Plan**

18. Do you think it is possible to raise \$1.7 million in private support for the Library?

| | Yes | No | Uncertain | Total |
|----------|----------|---------|-----------|-------|
| Internal | 14 – 78% | 2 – 11% | 2 – 11% | 18 |
| External | 24 – 80% | 2 – 7% | 4 – 13% | 30 |
| Total | 38 – 79% | 4 – 8% | 6 – 13% | 48 |

DVA Navion Observations:

Study participants were fairly optimistic about the ability to raise the stated goal in a community effort with more than 90% believing it possible or uncertain. This is a very positive indication of possible community support for the project.

19. What would you recommend as the best timing for this Campaign and why?

Internal Comments:

- Not during MURF (10)
- Wait for hospital pledges finish in Spring 2006. (4)
- Start in the Fall. (2)
- Shouldn't matter – there will always be competition.
- Start now, don't show signs of hesitation.
- There is already some momentum – started in 1999.
- Too difficult to have two campaigns at the same time.
- Summer – include summer/cottage residents
- Coordinate with the city.

External Comments:

- Not during MURF (11)
- Spring of 2006. (2)
- Try to avoid other programs.
- Wait until 2007.
- Do it now. MURF and hospital attract different supporters.

DVA Navion Observations:

The concerns over the MURF and the hospital pledge period surfaces here once again, with many individuals stressing the importance of waiting for the MURF to end. However, some individuals do believe that a campaign could commence during the MURF.

20. What should the Library Steering Committee do to ensure that it has a successful Campaign?

Internal Comments:

- Raise profile and enthusiasm. Need a dynamic Leader. Need awareness of library services – develop the Case. (11)
- Coordinate with MURF. (3)
- Get endorsement of Market Board. (3)
- Endorsement of Council, Chamber & Downtown Management Board. (2)
- It would be good to get federal and provincial dollars. Need their support and endorsement. (2)
- Broad campaign, accept and seek gifts from all levels. (2)
- Need a key donor.
- Show methodology and practical process of the process from start to finish.
- Seek endorsement and partnership with university.
- Emphasis on historic value, connections to Leacock Home, etc.

External Comments:

- Need a good communication and marketing program. (4)
- Need strong leadership, team and well-structured organization for fundraising. (4)
- Sell the downtown, cultural benefits. Make connections with Arts & Heritage community. (3)
- Make use of naming opportunities.
- City must be behind it.
- Need to attract younger people.
- Use a good “recognition” program.
- Need to keep pace with modern changes – IT, internet, etc.
- Need to educate about government funding.

DVA Navion Observations:

There are many excellent comments here which follow the requirements for successful fundraising, such as leadership, communications/profile, endorsements and selling the Case.

21. Whom would you suggest we interview in the study process?

A total of 55 names of individuals or organizations were suggested in response to this question. Due to the confidential nature of this information the names have been provided under separate cover.

22. Please provide any additional information?

Internal Comments:

- MURF is an issue. (4)
- Size is an issue. (3)
- Board needs better communication with Council. (2)
- Give more thought to Market Hall ideas. (2)
- Totally in support of this.
- Approach Oro-Medonte. Make a request to mayor and council.
- Will be a hard sell in some areas.
- Sell the benefits and education aspect of libraries.
- Look to “literary” organizations.
- Find ways to engage the schools.
- Approach Opera House for support.
- It’s good this project is finally moving forward.
- Consider Planned-Giving
- Lakehead University may impact on amount that can be raised.
- Visibility will come with the library as long as it isn’t controversial.
- Focus on seniors.
- City Council will have final say.
- Parking is an issue.
- Children need to be inspired to learn.
- Engage the business and other sectors of the community.
- Does the goal cover all the costs?
- Show costs for all elements – library, market, Carnegie building.
- Downtown business community is not all favorable to Market.
- Need to get things settled before the next election.
- There hasn’t been a “cultural” campaign in city in years.
- Consider adding parking – underground or on roof.

External Comments:

- MURF is a concern. (2)
- Satellite University is coming. (2)
- Consider having 2 entrances.
- Some people on council aren’t big supporters.
- Get investments from outlying communities.
- Set an achievable goal.
- Use the election to help – candidates can put this on the “platform”.
- Will internet service be as important in the future?
- Lakehead will impact on this project.
- Put the “ducks in a row” before starting.
- Develop a “Q&A” document to help people understand.
- Find out about any “skeletons in the closet” first.
- Great relationship with newspaper.
- There’s nothing wrong with an old building with new books
- Look for interest from Lakehead and Georgian.

- Architectural design should compliment Opera House and Carnegie Library.
- Library will appeal to a large audience.
- Hospital pledges will be completed in 2006.
- Naming opportunities and recognition is important.
- Gordon Lightfoot would like to have a place to showcase memorabilia – maybe the Carnegie Building.
- Look to partnerships with University.
- Need to be innovative.
- Become a “cool” place.
- There is a big economic benefit.
- Clarify the need.
- Does the Market need a building?
- Need to have a passionate leader.
- Make connections to Opera House and Market.
- Is this too much?
- Need to answer other questions about funding and operating costs.
- Appeal to the younger generation. Sell the sizzle.

DVA Navion Observations:

This question is normally a “catch-all” to gather any final comments and/or ideas not covered in the other questions. As you can see, there is a wide variety of responses. However, common themes such as the MURF, support of Council and size of the library are further supported here.

Evaluations and Recommendations

Financial Support for a Capital Campaign

One important way to evaluate support for Library expansion is to ask people if they will make a gift to the campaign. A second important question for evaluation is to ask the participant what their priority of making a gift would be in the event of a campaign. In the following charts, we have compared the answers we received during the OPL interviews to those in studies with other organizations.

| Comparative Analysis | |
|---|---------------------------|
| Question: <i>Is this a campaign that you would be willing to support financially?</i> | |
| Other Studies | % Responding “Yes” |
| Study A | 90% |
| B | 81% |
| C | 79% |
| D | 78% |
| E | *53% |
| F | *35% |
| <i>* DVANavion recommended against a campaign</i> | |
| Orillia Public Library | 90% |

Making a gift is one of the major factors in any study for a campaign. In the case of OPL the fact that 90% of participants are willing to make a financial contribution is very encouraging. **DVA Navion** prefers this figure to be above 60% when recommending a campaign.

| Comparative Analysis | |
|--|--|
| Question: <i>How does the public library rank among your philanthropic interests in terms of your financial support?</i> | |
| Other Studies | Responding “High Priority” or “Medium Priority” |
| Study A | 90% |
| B | 81% |
| C | 79% |
| D | 72% |
| E | 60% |
| F | *53% |
| <i>*DVANavion recommended against a campaign</i> | |
| Orillia Public Library | 88% |

A second important factor to consider is the level of commitment expressed by participants for the proposed project. While a very large number suggested a willingness to contribute, their priority for doing so is also key.

Again the results are encouraging. While the external participants were not as enthusiastic in terms of a priority, they did show good support. In total, 88% of participants felt this project would rank as a high or medium priority.

Campaigns are very challenging especially if the Case for Support is not perceived to be worthy of significant philanthropic support. There was good feedback about this project and a number of significant gifts were identified during the study process. Ten gifts above \$25,000 were self-identified and this is a positive indicator for campaign success.

Plan Evaluation

People give to causes. The Case dictates who will give and to what level of support they will give. The Case For Support for the Library received excellent responses during the Study. The reputation, need, location, Market Block/Three Jewels concept, cultural and educational significance and importance to the community are all positive aspects of the Library and proposed new Library that garnered significant support for the Case.

However, there are still a number of areas that require work in order to receive full support from the community, Council and stakeholders. These are: the proposed size of the new facility, de-shrouding and use of the Carnegie Building and the parking impact on the downtown. Of these three, the size of the facility received the most comments. It will be important to develop a solid and strong case to present to Council, potential donors and the community at large in order to receive optimum support.

It is recognized that significant work and reports have been done to justify the proposed plans, however, there are still concerns from a number of key stakeholders that require a stronger rationale. Once this has been done greater support will be received.

Leadership/Volunteer Evaluation

The importance of strong leadership in a fundraising campaign cannot be over-emphasized. This single ingredient determines not only who gives and how much is given, but also who is asked. Strong leadership can help to identify who will be asked and, in turn, participate in this crucial step.

In our interviews, **DVA Navion** asked study participants if they would be willing to volunteer their time for the proposed capital campaign. The following table illustrates the responses received compared to those received in other similar studies.

| Comparative Analysis | | | |
|--|------------|------------|------------------|
| Question: <i>Is this a campaign for which you would be willing to volunteer?</i> | | | |
| Other Studies | Yes | No | Uncertain |
| Study A | 75% | 5% | 20% |
| B | 72% | 14% | 14% |
| C | 62% | 31% | 7% |
| D | 50% | 11% | 39% |
| E* | 47% | 41% | 12% |
| F* | 44% | 31% | 25% |
| <i>* DVANavion recommended against a campaign</i> | | | |
| Orillia Public Library | 47% | 21% | 32% |

Only 47% of respondents indicated that they would be willing to volunteer for the campaign. There is potential to encourage more participation among the group who gave an “uncertain” response provided there is sufficient motivation and appeal. It should also be noted that the greatest support was among the internal group where 63% indicated a willingness to volunteer. However, campaign success is largely dependant upon receiving significant support in both time and resources from the broader community that is represented by the external group. In this case, only 34% were willing to volunteer. However, the “uncertain” responses are very high and therefore there is considerable potential to increase the volunteer potential for this project

These numbers may seem low and in the past we have recommended against undertaking a campaign without a high level of potential volunteers to draw upon. However, in recent years, our experience has shown that the need for large numbers of volunteers is no longer a make-or-break issue. With the trend toward more staff-driven (fundraising staff) campaigns using key volunteers in a strategic way for targeted solicitation has reduced the need for large numbers of volunteers. It does however, require the campaign to have the support and commitment of a number of key and influential leadership volunteers.

Prospect Evaluation

The purpose of the study is also to determine the potential dollars available for OPL's plan to build a new facility. Ideally, we are searching for significant leadership gifts (\$100,000 plus) to set the pace.

Multi-million dollar campaigns must receive large, pace-setting gifts to attract the many smaller contributions needed to carry them to the goal and beyond. Experience shows that the majority of successful campaigns have attracted a "lead" gift of at least 15% of the campaign goal and 60% from the top ten to fifteen gifts. The average campaign in the last five years has raised 75% of its goal in gifts of \$100,000 or more.

During this study, **DVA Navion** met with a number of key potential donors. **DVA Navion** looks for a minimum of 35% of the goal in identified gift support as one indicator of potential to determine the campaign goal. In the case of Orillia Public Library, the gifts identified amounted to approximately \$589,000. A single gift was self-identified at the \$100,000 level and another at the \$50,000 level. There were 8 gifts at the \$25,000 level and a large number of smaller gifts.

This result clearly suggests that the stated goal of raising \$1.5 - \$1.7 million is certainly a realistic and achievable amount.

Plan Evaluation

In evaluating the Plan for a campaign primary attention is given to timing, organization, fundraising methodology and staffing. Based upon the responses received from participants, the following evaluations are as follows:

- 1) The MURF campaign will have the greatest impact on a successful campaign for the Library. Two capital campaigns running at the same timeframe would affect both in a negative manner.
- 2) A Campaign Leadership Team of approximately 10-12 dedicated and influential individuals will be required to lead the Campaign. Campaign Co-Chairs should be considered.
- 3) In order to raise the campaign goal, five year pledges will need to be encouraged.
- 4) A full time Campaign Director with his/her total focus on the campaign will be required.
- 5) Professional Counsel (beyond the resources of a Campaign Director) will be required on a periodic basis. Total time required will depend upon the experience level of the Campaign Director.
- 6) A phased approach (seeking greatest potential first) will be most effective in raising the required dollars.
- 7) Person to person solicitation visits must represent the vast majority of solicitations.

Recommendations

The following recommendations are based on:

- Evaluation and information learned from the Feasibility study.
- 64 interviews with 73 individuals regarding this proposed campaign.
- Discussions with the Orillia Public Library Board and Staff, City officials and many others.
- **DVA Navion**'s experience with similar institutions.
- **DVA Navion**'s current campaign experience and understanding of philanthropic trends.

a) We recommend that Orillia Public Library set a working goal of \$1.5 million and solicit gifts for a five-year pledge period.

b) Proposed timing should be slated for commencement upon completion or nearing the completion of the MURF campaign. The campaign organization phase could commence as early as September 2006 (depending on the MURF), but most likely should be deferred to January 2007.

c) We recommend that a Task Force be recruited to review the proposed plans and address any areas of concern for both the Library and the City. This committee would be responsible for reviewing the current plans, making recommendations and/or revisions, soliciting the endorsement of Council and the Library Board. The major items to address will be:

- Justifying the size of the new Library
- Confirming the need to de-shroud the current Library
- Addressing any parking concerns
- Developing a firm annual operating budget for the new facility

d) The Library should continue to:

- cultivate relationships with its current donors and supporters
- maintain high media profile
- cultivate stronger relationships with other literary stakeholders such as the Leacock Museum and Manticore bookstore
- receive greater support/involvement/ endorsement from the Opera House
- cultivate support from the municipalities
- investigate any possibilities/potential with Lakehead University

e) Fundraising efforts should focus first on leadership gifts (\$50,000+) followed by person-to-person visits organized by sector (i.e. families, business, user groups, service clubs) and then a broad-based appeal to residents. As planning for this fundraising project begins, a key consideration will be the development of naming opportunities and donor gift clubs to excite and encourage the community to make meaningful gifts.

f) We strongly recommend identifying and recruiting Co-Chairs for the Campaign and a variety of individuals to serve on the Campaign Committee. Recruiting a single individual with the necessary network and influence, as well as the time to dedicate to this project will be challenging. Co-Chairs will allow the Campaign to address political sensitivities, spread responsibility, and allow the campaign to strategically target a wider range of potential supporters. Defining the roles of each Co-Chair will be required.

g) **DVA Navion** strongly recommends that this effort be supported by a dedicated Campaign Director who has strong fundraising expertise specifically in conducting community capital campaigns.

h) Strong communications efforts must be made to prospective donors to clearly articulate the need and answer a variety of outstanding questions about the project. This will be particularly important in the municipalities surrounding Orillia that will benefit from the new facilities.

i) The capital campaign should follow the timeline as outlined on page 26. This plan includes an organizational readiness phase that will last approximately three months. This will be followed by campaign activity conducted in stages that correspond with the levels of gift solicitation and last approximately 12 months. Therefore, the full timeline for the campaign will be 15 months.

j) Sufficient funds should be secured to fund the fundraising costs for the campaign. The primary costs will be for the Campaign Director, professional counsel and an operating budget (printing, recognition, travel, technology etc.). The operating budget for the campaign should be set at approximately \$50,000. This is not paid to professional counsel.

The costs for the Campaign Director and professional counsel will vary depending upon the experience of the Campaign Director and the amount of service required by professional counsel. **DVA Navion** has prepared, under separate cover, various staffing models and respective costs for review by the Library.

All effort should be taken to limit the total costs to between \$150,000 - \$200,000 (10%-13%) of the total goal.

Sample Campaign Timetable (15 months)

| | Month 1 | Month 2 | Month 3 | Month 4 | Month 5 | Month 6 | Month 7 | Month 8 | Month 9 | Month 10 | Month 11 | Month 12 | Month 13 | Month 14/15 |
|--|---------|---------|---------|---------|---------|---------|---------|---------|---------|----------|----------|----------|----------|-------------|
| Pre-Campaign Activity <ul style="list-style-type: none"> Finalize Project Details, Building Design, Seek Other Public Funds, Formal Council Approval | | | | | | | | | | | | | | |
| Campaign Readiness Phase <ul style="list-style-type: none"> Prepare Case for Support Develop Campaign Materials Prepare Cultivation Plan Identify/cultivate Top 10 Prospects Recruit Leadership Set up Campaign Operations Develop donor recognition & in-kind systems and levels | | | | | | | | | | | | | | |
| Cultivation & Solicitation Activity | | | | | | | | | | | | | | |
| Leadership/Major Gifts | | | | | | | | | | | | | | |
| Divisional Campaigns <ul style="list-style-type: none"> Businesses Community Groups Families | | | | | | | | | | | | | | |
| Community Campaign | | | | | | | | | | | | | | |
| Building Awareness and Support | | | | | | | | | | | | | | |
| Community Launch | | | | | | | | | | | | | | |

Appendices

- List of Participants
 - Participation Request Letter
 - Case Summary
 - Questionnaire
-

List of Participants

| Name | | Organization | Constituency |
|------------------|-----------------|-------------------------------------|--------------|
| | Anonymous | | Internal |
| Jane | Ball | | External |
| Lori | Beresford | Board | Internal |
| Bob | Brown | Thor Motors | External |
| Ian | Brown | City Manager | Internal |
| Suzanne | Campbell | Library Staff & BSC | Internal |
| Stephen/Mark | Carroll/Bissett | Packet and Times | External |
| Barry | Chapman | Friends of the Library | Internal |
| Anderson | Charters | Publisher | External |
| Ralph | Cipolla | Orillia City Councilor | Internal |
| Jay & Joan | Cody | | External |
| Colin | Couper | Councilor – Severn | Internal |
| John | Crawford | Councilor – Oro-Medonte | Internal |
| Susan | DePiero | Physician | External |
| Catherine | Dowd | Board Chair | Internal |
| Garfield | Dunlop | M.P.P. | External |
| Lynda | Dyball | Friends of Library | Internal |
| Carl | Garland | Lib. Board/City Councilor | Internal |
| Jim | Harris | Friends of Library | Internal |
| Pat | Hehn | | External |
| Lorna | Irwin | | External |
| Sheryn | Jeffries | Farmers Market | External |
| Bob | Johnson | Lakeland Rotary | External |
| Dr. Dick | Johnson | | External |
| Evelyn | Johnstone | Friends of the Library | Internal |
| Harvie | Johnstone | Friends of the Library | Internal |
| Jacqueline | Koza | | External |
| Frank | Kreisz | OPP, Library Board | Internal |
| Tim | Lauer | Orillia City Councilor/BSC | Internal |
| Susan | Lang | Chamber of Commerce | External |
| Sherry | Lawson | Casino Rama | External |
| Doug | Lewis | Lewis, Downey, Tornosky & Lassaline | External |
| Jim | MacDonald | Library Board | Internal |
| Pat | MacMillan | | External |
| Michael Helen | & Mallon | | External |
| Josie | Manna | Real Quest Realty | External |
| John | Mayo | Kiwanis | External |
| Sharon | McBride | Farmer's Market | Internal |

| Name | | Organization | Constituency |
|---------------|--------------|---------------------------|--------------|
| Ken | McCutcheon | Farmer's Market | Internal |
| Mary | McEvoy | Friends of the Library | Internal |
| Roy | Menagh | | External |
| Craig | Metcalf | City – Culture & Heritage | Internal |
| Sue | Mulcahy | | External |
| Joanna | Rolland | Past Board | External |
| Phil | Hull | | External |
| Mary | Rose | Consultant/BSC | Internal |
| Don | Ross | | External |
| David | Rowe | Library Staff/BSC | Internal |
| Mike | Saddy | Library CEO | Internal |
| Mary/Bill | Silk/Belfour | Lions Club | External |
| Paul | Spears | Orillia City Councilor | Internal |
| Bruce | Stanton | Past Board/Past Councilor | External |
| Cathy | Stephenson | TD Bank | External |
| Ron | Stevens | Mayor of Orillia | External |
| Jack & Betty | Stewart | | External |
| Dr. John | Strathearn | | External |
| Gini & Trevor | Stringer | Sunshine Carpets | External |
| Pat | Thor | Downtown Mgnt. Board | External |
| Kirk | Thornton | Friends of the Library | Internal |
| Bruce | Waite | | External |
| John | Waite | Coldwell Banker | External |
| Gail & Martin | Ward | Library Staff/BSC | Internal |
| Ruth & Jim | Watt | | External |
| C.V. | White | | Internal |
| Jim | Wilson | Jim Wilson Car Dealership | External |

Participation Request Letter

Dear _____:

Since 1911 the Orillia Public Library (OPL) has played an important role in improving the quality of life of this community.

Over the last five years a steering committee of library and community individuals has been investigating viable expansion options to assist the library in meeting the growing demand for library services in our region. Our library has a rich history and while there have been many renovations over the years, space and design restrictions seriously limit the service the Orillia Public Library can provide to local residents. This community deserves better. We must build a new facility that will serve the library needs of our growing area now and into the future.

Our vision is of three jewels in a crown: the new four story Orillia Public Library, the Orillia Opera House, and an expanded Farmers' Market and open space for community events and pure enjoyment.

In total, we expect the costs to be just under \$13 million. Funding for this will come from all levels of government and a community fundraising campaign.

Prior to initiating the fundraising campaign, we have engaged **DVA Navion**, a Canadian fundraising consulting firm with experience in the library sector, to conduct a feasibility study. The study will seek the advice of our library board and staff, library users, supporters, businesses, government and community leaders to determine the direction the fundraising campaign should take.

A representative of OPL will contact you within the next week to request a 30 to 45 minute face-to-face interview with a representative of **DVA Navion**. This will be scheduled at a time most convenient to you in order to hear your comments on the proposed plans and options. This is a confidential information gathering session only and you will not be asked to make a financial commitment at this time.

The attached *Case Summary* outlines our proposed project in greater detail. We hope you will take some time to read it prior to this interview.

We believe that your feedback will be essential in helping us to determine our fundraising potential in order that we may realize this vision of a crown with three jewels.

Sincerely,

Catherine Dowd
Chair, Orillia Public Library Board

Michael Saddy
CEO, Orillia Public Library

Case Summary

NOTE:

Due to the size and format of the Case document, it is only included in the full printed version of this report.

Study Questionnaire

Section 1 Background

1. Background of the Interviewee

| Internal | | External | |
|------------------------|--|-----------------------|--|
| Library Board | | Corporation | |
| Friends of the Library | | Financial Institution | |
| City Council | | Local Business | |
| Library Staff | | Service Club | |
| City Hall Staff | | Foundation | |
| | | Individual | |
| Committee | | Government - other | |
| Other | | Other | |

2. Do you or a family member currently use the services/programs/facilities at the Orillia Public Library?

| Yes | No |
|-----|----|
| | |

If yes, how would you describe the services/programs/facilities?

3. How would you describe the Orillia Public Library in terms of profile in the community?

| High | Medium | Low |
|------|--------|-----|
| | | |

Section 2 Case for Support

4. Having read the Case Summary, does it explain the need for a new main library in a compelling manner?

| Yes | No | Uncertain |
|-----|----|-----------|
| | | |

5. Would you consider yourself in support of these plans?

| Yes | No | Uncertain |
|-----|----|-----------|
| | | |

6. What appeals to you most about the plans?

7. In your opinion, what are the greatest strengths of the Library in terms of launching a Campaign?

8. Please state any factors you may be aware of that might hinder a Capital Campaign to provide community support for the new Library?

Section 3 Volunteer Leadership

9. Please suggest anyone who, because of their community stature, leadership skills or organizational ability could lead this project to success?

10. If you were Chair of this program, who would you want on your team?

11. *Without making a commitment*, is this a project for which you would see yourself volunteering?

| Yes | No | Uncertain |
|-----|----|-----------|
| | | |

12. Would you be willing to visit some selected prospects or open doors to potential donors on behalf of the Orillia Public Library?

| Yes | No | Uncertain |
|-----|----|-----------|
| | | |

Section 4
Potential Donor Prospects

13. Please identify any corporations, foundations or individuals whom you consider capable of making a gift of \$100,000 or more over a three to five year period?

Whom do you believe should be the “top 5” donors to this program.

14. Please identify any corporations, foundations or individuals whom you consider capable of making a gift of \$25,000 or more over a three to five year period?

15. How would you/your business/your organization look upon your overall charitable giving plans, in relation to this project?

| High Priority | Medium Priority | Low Priority |
|---------------|-----------------|--------------|
| | | |

16. Is this a Campaign you would be willing to support financially?

| Yes | No | Uncertain |
|-----|----|-----------|
| | | |

17. In order for **DVA Navion** to accurately predict the amount that can be raised in philanthropic support for the Library, we ask each person to take a moment to reflect on the level of support they might consider for this important cause. *Without committing yourself*, is there a category on this chart that would reflect the amount of support you would consider over a period of **three to five** years?

| Category | Amount | |
|----------|---------------|--|
| A | \$ 1 million | |
| B | \$ 500,000 | |
| C | \$ 250,000 | |
| D | \$ 100,000 | |
| E | \$ 50,000 | |
| F | \$ 25,000 | |
| G | \$ 10,000 | |
| H | \$ 5,000 | |
| I | Up to \$5,000 | |

Section 5
The Plan

18. Do you think it is possible to raise \$1.7 million in private support for the Library?

| Yes | No | Uncertain |
|-----|----|-----------|
| | | |

19. What would you recommend as the best timing for this Campaign and why?
20. What should the Library Steering Committee do to ensure that it has a successful Campaign?
21. Whom would you suggest we interview in the study process?
22. Please provide any additional information?