



Jefferson Public Library  
READINESS STUDY  
ABRIDGED VERSION

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# Methodology

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A fundraising readiness study is a process to discover an organization's potential to raise funds for an initiative through a significant fundraising campaign. The process measured the Jefferson Public Library's awareness level in the community and the willingness for community members to support the proposed \$10 million campaign. The readiness study also provided an accurate review of factors that would affect the campaign's success.

To assess the factors that would affect the fundraising campaign for the Jefferson Public Library, AMPERAGE:

1. Conducted 38 in-depth interviews with individuals with past and present ties to the Jefferson, Iowa community. One of the 38 interviews was recorded as two responses due to varying opinions shared by the two individuals in an interview, for a total of 39 responses.
2. Emailed and sent leadership survey links to 24 members of the Jefferson Public Library Board of Trustees, Friends of the Library Board of Directors, Jefferson City Council and library readiness study committee. Twenty-two surveys were completed.
3. Examined the organization's campaign readiness and conducted a SPOT (strengths, problems, opportunities and threats) analysis.

The substance of the interviews and surveys tested the:

1. Awareness and image of the Jefferson Public Library.
2. Perceived strengths and weaknesses of the campaign.
3. Proposed \$10 million fundraising goal over a five-year pledge period.
4. Perceived likelihood of achieving the goal.
5. Reaction to the capital campaign.

6. Levels of giving.
7. Availability of large gifts.
8. Availability of potential campaign leadership.
9. Organizational readiness.

Before the interviews, each participant received a statement of need — a brief description of the proposed campaign and its goals.

Melissa Pence, MSL, CFRE; Amy Guardado, MSL and Billie Bailey, fundraising advisers at AMPERAGE Marketing & Fundraising, conducted the interviews. The interviews were informal, and a promise of confidentiality allowed for an honest exchange of information.

Each participant was asked to comment on the members of the Jefferson Public Library Board of Trustees and Friends of the Library Board of Directors; the level of giving needed to reach the campaign goal; possible personal and/or corporate giving level and their interest in campaign leadership or involvement. To maintain confidentiality, specific interviewee content is anonymous. The names of individuals interviewed as well as verbatim comments from the interviews are provided under separate cover.

The opinions of those interviewed and surveyed — community leaders and board members — provide a reasonable measure of the proposed campaign's probability of success and serve as the basis for our evaluation.

# Executive Summary

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To present the findings in an orderly manner, the questions have been grouped into the following categories:

- Image
- Board and Administration
- The Proposed Project
- Giving Capacity
- Potential Leadership

Each section will contain a brief generalization of the findings, selected comments of those interviewed and observations related to the findings.

## Section 1. Image

The first set of interview questions focused on the image of and awareness of the Jefferson Public Library.

### 1. How familiar are you with the Jefferson Public Library and its programs and services in the community?

Very	9
Yes	20
Somewhat	9
No	1

### 2. How do you know about the Jefferson Public Library?

### 3. What are the benefits of the Jefferson Public Library in the community?

### 4. How do you perceive the image of the Jefferson Public Library to be?

Very Good	18
Good	14
Fair	4
Poor	1

Don't Know 2

**4B. If you were part of the Jefferson Public Library's leadership, what would you recommend, if anything, to improve its image?**

## Observations

All but one person interviewed for the Jefferson Public Library readiness study was at least somewhat familiar with the library and its programs and services in the community. Many that were familiar could date back to using the library as a kid growing up in Jefferson. *"I was born and raised in Jefferson. I was an avid reader in my youth. In the summers, I either spent my time at the pool or the library."*

Others interviewed did not grow up in Jefferson but shared how as current residents of the town they have utilized the library. *"I moved to Jefferson 11 ½ years ago. I'm a lifelong library user and come in about every week or every other week. When we moved, we looked at the library to determine whether it is a community we would want to live."*

When asked what the benefits of the Jefferson Public Library are in the community, many commented on the free program activities and resources for all generations and a place to gather in the community. *"The library should be a central place in the community. A community without a library is not showing its citizens the importance of learning, sharing and a gathering in a common space."*

Eighty-two percent of interviewees view the image of the Jefferson Public Library to be very good or good. *"It depends on who you talk to. They provide positive customer service. There's a lot of sunshine that comes from the children's area."* Another interviewee commented, *"Staff friendly and creative with programming. Looks professional."*

Ten percent of interviewees shared the library was perceived as fair in the community. *"Half of the community is good with the library and the other half doesn't know it exists."*

To improve the image of the Jefferson Public Library, interviewees offered suggestions such as expanding the library hours to full-time so it's accessible

to all individuals at different stages of their life. *“A full-time library with regular hours for programming and expansion needs. If we can’t afford a library with regular hours, then we shouldn’t be talking about expansion. The city needs to put the money into a full-time library from 9 am – 7 pm everyday. If we can’t afford to do that, how will we afford a new facility? That is the overarching issue. The City Council needs to fund full operations.”*

Other interviewees offered more marketing to promote the library and its programs. Another segment of interviewees shared that expanding the library collection may help improve their image in the community.

## **Section 2. Board and Administration**

The next set of questions in the interviews focused on the perceptions of the Jefferson Public Library and its leadership.

**5. How many members of the Jefferson Public Library Board of Trustees and the Friends of the Library Board of Directors do you know or recognize by name?**

<b>All</b>	<b>7</b>
<b>Most</b>	<b>21</b>
<b>Some</b>	<b>10</b>
<b>One or Two</b>	<b>1</b>
<b>None</b>	<b>0</b>
<b>Don’t Know</b>	<b>0</b>

**6. Are they viewed as leaders in the community?**

<b>Yes</b>	<b>24</b>
<b>No</b>	<b>0</b>
<b>Some</b>	<b>10</b>
<b>One or Two</b>	<b>4</b>
<b>Not Sure</b>	<b>1</b>

**7. Do you think the members of the Library Board of Trustees and Friends of the Library Board of Directors have the ability to raise major gifts for a capital campaign?**

<b>Yes</b>	<b>15</b>
<b>No</b>	<b>5</b>
<b>Most</b>	<b>4</b>
<b>Some</b>	<b>9</b>
<b>Not Sure</b>	<b>6</b>

**Why or why not?**

**8A. Is the Jefferson Public Library viewed as a well-run library?**

<b>Yes</b>	<b>29</b>
<b>No</b>	<b>4</b>
<b>Don't Know</b>	<b>6</b>

**Why or why not?**

**8B. Is the Jefferson Public Library viewed as a financially sound library?**

<b>Yes</b>	<b>14</b>
<b>No</b>	<b>3</b>
<b>Don't Know</b>	<b>22</b>

**Why or why not?**

## **Observations**

The interviewees were given a list of the Jefferson Public Library Board of Trustees and Friends of the Library Board of Directors and were asked how many of the library's leadership members they knew or recognized by name.

Eighteen percent of interviewees knew all the Jefferson Public Library's Board of Trustees and Friends of the Library board members. Seventy-nine percent of interviewees knew most or some of the library leadership members. One interviewee only knew one or two of the individuals listed as a library board of trustee or Friends of the Library board member.



Twenty-four interviewees or 62% felt the Jefferson Public Library Board of Trustees and Friends of the Library board members were viewed as leaders in the community. *“Good cross section of people, admired, good thinkers.”*

Another 26% of interviewees felt some of the members were viewed as leaders in the community. Four interviewees felt one or two of the individuals on the two boards were viewed as community leaders and one interviewee did not think any board members were viewed as community leaders.

Fifteen or 38% felt the Jefferson Public Library Board of Trustees and Friends of the Library Board of Directors had the ability to raise major gifts for a capital campaign. *“If they want change, they will get it.”*

Four readiness study interviewees felt most of the library’s leadership had the ability to raise major gifts for a capital campaign and another nine (23%) felt some had the ability. *“The Board of Trustees, yes. I’m not sure of the Friends group.”*

Six participants or 15% did not know if the library leadership had the ability to raise major gifts for a capital campaign. *“They have the ability to raise money, but can they raise \$10 million? I’m not sure if that’s possible.”*

The remaining five readiness study participants did not think the Jefferson Public Library Board of Trustees and Friends of the Library Board of Directors had the ability to raise major gifts for a capital campaign.

Readiness study participants were asked if the Jefferson Public Library was a well-run library. Twenty-nine interviewees or 74% felt the Jefferson Public Library was well-run. *“They do all they can to make the library friendly. It’s a wealth of information for all ages. They make it comfortable for all of us.”*

Four interviewees for the readiness study did not view the Jefferson Public Library as well-run and the remaining 15% of interviewees did not know if the Jefferson Public Library was well-run.

Readiness study participants also were asked if the Jefferson Public Library is viewed as a financially sound library. Thirty-six percent or 14 interviewees do view the Jefferson Public Library as a financially sound library. *“It’s extremely well-run on the fiduciary standpoint. To make the library successful with the resources that they have.”*

Over half of the interviewees or 56% did not know if the Jefferson Public Library was financially sound. *“I don’t know about their finances.”*

The remaining three interviewees did not view the Jefferson Public Library as being financially sound. *“Their weakness is in the hours of operation. They are dependent on the City Council. Is the investment from the city there?”*

### **Section 3. The Proposed Project**

Next, we learned interviewees’ receptiveness to the Jefferson Public Library’s proposed campaign to expand the library.

#### **9. What was your level of knowledge of the Jefferson Public Library’s proposed capital campaign to expand its library prior to being contacted for this interview?**

<b>A Lot</b>	<b>9</b>
<b>Some</b>	<b>13</b>
<b>A Little</b>	<b>15</b>
<b>None</b>	<b>2</b>

#### **10. Do you feel the scope of the campaign is correct, do you feel it’s too large, or do you feel more should be included?**

<b>Correct</b>	<b>17</b>
<b>Too Large</b>	<b>8</b>
<b>Too Small</b>	<b>1</b>
<b>Need More Information</b>	<b>13</b>

#### **11A. How receptive are you to the proposed campaign?**

<b>Very Receptive</b>	<b>13</b>
<b>Receptive</b>	<b>9</b>
<b>Somewhat Receptive</b>	<b>9</b>
<b>Somewhat with Exceptions*</b>	<b>7</b>
<b>Not Receptive</b>	<b>0</b>
<b>Not Sure</b>	<b>1</b>

#### **11B. \*What are the exceptions?**

### 11C. How supportive do you think the community will be?

<b>Very Supportive</b>	<b>0</b>
<b>Supportive</b>	<b>9</b>
<b>Somewhat Supportive</b>	<b>23</b>
<b>Not Supportive</b>	<b>1</b>
<b>Not Sure</b>	<b>6</b>

## Observations

Nine readiness study interviewees or 23% knew a lot about the proposed capital campaign to expand the library. *“I was a previous trustee, so I knew quite a bit.”*

Thirteen readiness study participants knew some about the proposed plans for library expansion and another 15 interviewees knew a little about the library’s plans. *“Aware of several options and why they were ruled out. Friends on the board have discussed it with us.”*

Two readiness study participants did not know anything about the proposed plans to expand the Jefferson Public Library.

When asked if the scope of the proposed project was correct, too large or too small in size, 17 interviewees or 44% felt the scope of the project was the correct size. *“You got to think big. Something else that is new and improved in the community and that people can walk there. The location is important. The library has become an anchor in our community. I don’t know if another location will be able to serve the community in the same way.”* Another interviewee commented, *“I’m pleasantly surprised at how busy it is. They’d use it if they had it.”*

Eight readiness study participants felt the proposed project was too large. *“There is a need for the library to be updated but I struggle with updating the current facilities. There are several city buildings that are not ADA compliant. They need to look at sharing and updating buildings for several city services.”*

Other interviewees who felt the project scope was too large commented on the cost of the proposed project with the community’s shrinking population. *“Ten*

*million sounds BIG! Need to do something to reduce the size of the project a bit.” “It seems pretty big. The population of the city has not grown.”*

One readiness study participant felt the size of the project was too small.

The remaining 13 readiness study participants or 33% needed more information about the proposed project plans before determining whether the size of the expansion was accurate. *“What are they trying to expand and what are their needs? The questions I have are the costs to build new versus expanding. What are the construction costs for a new building versus the construction to expand and maintenance of the current building to keep it looking modern?”*

Others questioning the project scope wondered if additional meeting spaces were needed in the community. *“Jefferson has a lot of community meeting room space already around town. Is separate space needed for the Friends of the Library?”*

Twenty-two readiness study interviewees were receptive or very receptive to a proposed campaign to expand the Jefferson Public Library. *“Jefferson is up-to-date on its amenities. The library is next.”*

Sixteen interviewees were somewhat receptive with a proposed campaign including seven of the participants noting their exceptions. *“Is there potential for collaborations with several other organizations in the community? Everything is moving so quickly and evolving. How will libraries be relevant five to ten years from now.” “Even though I’m receptive, the cost will be an issue, taxes are high.”*

One readiness study participant was not sure if they were receptive to a proposed campaign to expand the library.

Readiness study participants were also asked how supportive the community would be of the proposed library expansion and potential capital campaign. No one felt the community would be very supportive of the proposed expansion and campaign but nine or 23% felt the community would be supportive. *“Supportive. If they have community buy-in. Make sure they [community members] are heard and they believe in it.”*

Twenty-three interviewees or 59% felt the community would be somewhat supportive of the library expansion and potential campaign. *“I don’t think*

*anyone will be against the library or it expanding. The pushback will be on the money it will take.” Another readiness study participant shared, “Stay away from a bond referendum to fund. Get more data out about how many are using the library.”*

One readiness study participant did not think the community would be supportive of the Jefferson Public Library’s campaign to expand. *“Not at \$10 million. They don’t see the demand for it like the Rec Center.”*

The remaining six readiness study participants were not sure how the community would perceive the Jefferson Public Library’s proposed plans for a capital campaign to expand. *“Not sure. I think they would be supportive of the idea, but not sure on how much will be funded.”*

## **Section 4. Giving Capacity**

Readiness study participants were asked to determine if there is the necessary giving potential to conduct a \$10 million campaign for the Jefferson Public Library’s proposed project.

### **12A. Do you think a \$10 million goal is realistic and attainable, utilizing a five-year pledge period to fulfill gifts?**

<b>Yes</b>	<b>14</b>
<b>No</b>	<b>10</b>
<b>Don’t Know</b>	<b>15</b>

### **12B. If YES, how would you rate the difficulty of raising the money?**

<b><u>Rating</u></b>	<b><u># Responses</u></b>
<b>(Very Easy) 1</b>	
<b>2</b>	
<b>3</b>	
<b>3.5</b>	<b>1</b>
<b>4</b>	<b>1</b>
<b>5</b>	<b>3</b>
<b>5.5</b>	<b>1</b>
<b>6</b>	<b>1</b>

6.5	1
7	2
7.5	1
8	1
8.5	1
9	
<b>(Very Difficult) 10</b>	<b>1</b>

**12C. If NO or DON'T KNOW, how much do you think is realistic?**

**13. Are there any existing conditions or other fundraising campaigns in the area that could affect the Jefferson Public Library's campaign success?**

Yes 20  
 No 16  
 Don't Know 3

If yes, what?

**14. After reviewing the scale of giving required to raise \$10 million, do you feel there are individuals, foundations and companies with the ability to make these kinds of gifts over a five-year period?**

Yes 23  
 Maybe 6  
 No 8  
 Don't Know 2

Why or why not?

**15A. Who could be the individuals, foundations or companies most likely to make the top three to five gifts?**

**15B. Who should we make sure we visit with about this campaign?**

**16A. Would you endorse this campaign?**

Yes 26

<b>Maybe</b>	<b>9</b>
<b>No</b>	<b>3</b>
<b>Don't Know</b>	<b>1</b>

**Why or why not?**

**16B. Who else must endorse the plan for the campaign to be successful?**

**17A. What are your main reasons for supporting the Jefferson Public Library, that's if you do?**

**17B. What would make you want to increase your giving to the Jefferson Public Library?**

**18. We aren't seeking a gift in this interview. However, if the Jefferson Public Library were to conduct this campaign, would you consider making a gift to it? Where could you see your gift in the gift table, knowing it could be paid over five years?**

## **Observations**

Fourteen readiness study interviewees, or 36%, believed the proposed campaign goal of \$10 million was realistic and attainable if a five-year pledge period is utilized. *"If it's possible, you go out and do it. Look at all the ways it will support the community, not just the money. Loved ones who have passed away, memorials and wills that can give to the library."*

These study participants rated the difficulty of raising the money from a scale of 1 to 10, with 1 being very easy and 10 being very difficult. The average response of difficulty to raise the funds was 6.32.

Fifteen readiness study participants, or 38%, did not know if the goal would be feasible. *"It's a heavy lift. I just completed a \$10 million campaign in Des Moines, and it was challenging and there were more people and businesses to ask for support."*

The remaining 10 interviewees (26%) did not think the \$10 million goal was realistic or attainable. *"Pull back – the animal shelter had to go from \$3 mill to \$1.5 mill. No bond. Trim the project."*

Those who did not think the \$10 million goal was realistic or attainable provided a range between \$2 million and \$8 million as a more realistic goal to achieve.

Just over half (51%) or twenty readiness study interviewees felt there were existing conditions and other fundraising campaigns in the area that could affect the Jefferson Public Library's campaign success. The majority of those stated other recent projects in the community as an obstacle and the feeling that community members were feeling tapped out. *"The biggest hurdle is that there's been a lot the last few years with the school, jail and animal shelter. Could you get enough people on board? Maybe wait a little bit before starting a new campaign?"*

The Rec Center, bike trail and pools were also mentioned as potential projects that could impact the Jefferson Public Library's campaign success.

Sixteen interviewees or 41% did not think there was anything that would impact the Jefferson Public Library's fundraising success.

Three readiness study participants did not know if there were any other campaigns or existing conditions that would impact the Jefferson Public Library's fundraising success for expansion.

After being shown the gift table required to raise \$10 million, 23 interviewees, or 59%, felt there are individuals, foundations and companies with the ability to make leadership gifts for the library campaign.

Six readiness study participants thought there may be individuals, companies and foundations with the ability to make a lead gift for the Jefferson Public Library's campaign and two interviewees did not know.

Eight readiness study participants did not think there were individuals, foundations and companies that would contribute lead gifts for the Jefferson Public Library's proposed campaign.

When asked if they would endorse the campaign, 26 interviewees, or over 67% said yes. *"It's an important amenity for the growth of the county. Great schools, health care, good for attracting young people. I support reading and activities that surround it."*



Nine readiness study participants answered that they might endorse the campaign with several of those commenting that they would support the library's expansion but unsure of the proposed plans to do so and others concerned about the cost of the proposed expansion. *"I would but it's got to make sense. If the amount makes sense and the community need is there."*

Three readiness study participants shared that they would not endorse the campaign. *"No, not in the idea they are wanting. I don't endorse at the current facility. I support the Jefferson Public Library but not a campaign to build at the current location."*

One readiness study participant did not know if they would endorse the campaign to expand the Jefferson Public Library. *"Good concept but not in present form—primarily because of the money."*

Readiness study participants shared why they support the Jefferson Public Library. Many commented on the importance of the library as a community resource, place for gathering and education. *"It's a valuable community resource, provides a sense of community, there is something for everyone's interest."*

## **Section 5. Potential Leadership**

The following questions were asked to help determine the availability of campaign volunteers.

**19. Who do you believe could be the top three people to lead the fundraising efforts for this campaign?**

**20. Are there others who must be involved for this campaign to succeed?**

**21A. Would you consider serving on a short-term committee to review names of potential donors?**

<b>Yes</b>	<b>18</b>
<b>Maybe</b>	<b>8</b>
<b>No</b>	<b>13</b>

**Why or why not?**

**21B. Would you consider serving on a campaign committee in a leadership capacity?**

<b>Yes</b>	<b>3</b>
<b>Maybe</b>	<b>4</b>
<b>No</b>	<b>32</b>

**Why or why not?**

**21C. Would you consider making any campaign gift asks for the Jefferson Public Library campaign?**

<b>Yes</b>	<b>6</b>
<b>Maybe</b>	<b>11</b>
<b>No</b>	<b>22</b>

**Why or why not?**

**22. Why did you agree to participate in this interview?**

**23. Additional comments.**

## **Observations**

Regarding volunteering in some capacity for the campaign themselves, eighteen interviewees (46%) expressed interest in serving on a committee to review names of potential campaign donors. Another eight interviewees said they may consider the opportunity to serve on a prospect evaluation committee.

In terms of serving on a campaign steering committee, three individuals expressed interest in serving in that capacity. Another four individuals would consider the opportunity to serve on a campaign steering committee.

Six individuals indicated interest to help support the campaign fundraising efforts by helping to make gift asks for the campaign. Another eleven interviewees said they would maybe consider help make gift asks.

Although adding the Jefferson Public Library Board of Trustees and Friends of the Library Board of Directors as interested in volunteering for the campaign increases some capacity, the organization must be able to recruit local leaders in the community to serve on a campaign committee and take leadership roles. These people need to be cultivated to get on board and be willing to make campaign gift asks. Recruiting and retaining fundraising volunteers is one of the greatest challenges for a campaign.

# Leadership Assessment

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A pre-campaign leadership assessment survey was conducted in conjunction with the readiness study. The purpose was to measure the level of support from the Jefferson Public Library’s Board of Trustees, Friends of the Library Board and readiness study committee members. Twenty-two of a possible 24 surveys (92%) were completed. AMPERAGE usually finds a 67% or higher response rate in campaigns that successfully move ahead.

## Section 1. Campaign Readiness

	<b>Please rank your perceptions of the Jefferson Public Library’s readiness to conduct a capital campaign using a scale of 1 – 5 (5 = the highest).</b>	<b>Average</b>
A.	We have a strong and positive image and reputation, and our record of service to the region is above reproach.	4
B.	We have a solid history of fundraising success.	3.3
C.	Our constituency supports us in an exemplary manner.	3.6
D.	The need for the campaign ranks high among total community needs.	3.7
E.	Our constituency understands and supports the cause.	3.4
F.	The \$10 million we seek in private funds is available in our region.	3.3
G.	Our constituency has responded favorably in the past to campaigns similar in size and scope.	3.2
H.	We have among our “inner circle” of friends and board members well-informed, influential and experienced leaders who are willing to work, lead and give in support of the project.	3.8
I.	We have a substantial body of volunteers who are willing and able to work actively in support of the campaign.	3.6

J.	A comprehensive process of long-term planning has taken place involving the board members, and the need is a logical outgrowth of that process.	4.1
K.	Credible documentation of the need has been prepared and explains the details of the project and describes history and needs but also concentrates on positive outcomes and people served.	4.1
L.	A process is in place to address significant obstacles that may be uncovered prior to or during our campaign.	3.2
M.	Our organization is internally ready. We have in place experienced development staff, highly accurate and retrievable records, adequate support personnel and the financial resources to conduct a campaign of the needed duration.	3.6
	<b>Percent Responding</b>	<b>22/24 - 92%</b>

## Section 2. Profile and Involvement

Leadership members surveyed have been associated with the Jefferson Public Library from 1 to 45 years. Several members have been associated with the library for more than 5 years and at least two stated they have lifetime associations with the library.

## Section 3. Mission and Administration

Half of the members of the Jefferson Public Library leadership listed lifelong learning and promoting literacy as the mission. Three stated that they didn't know and another three didn't respond. *"Provide programs and books that promote literacy in the community. (I looked for the mission statement on the webpage and could not find it...)"*

When asked what they believed to be the number one priority of the Jefferson Public Library, most respondents answered that providing services to the community is the primary role of the library. Some members looked to the future, stating, *"Morphing in the changing media landscape to still promote the general love and skill of reading while providing access to new forms of media that more and more people engage with. Also, communicating that*

*these things are available to the public.” Other respondents were focused on more traditional, immediate services, “Provide a space for the community to go and learn and/or have access to books and other basic needs that one might not have access to in home (computer, printer, copier).”*

Fifty percent of leadership respondents believed the Jefferson Public Library has a strong capacity and the affluence/influence to conduct a major campaign. *“Jefferson/Greene County, as a rural community, has resources and assets available that I believe can be accessed through a well-thought-out plan implemented in a professional and strategic manner.”*

The remaining 50% of respondents were unsure of their affluence/influence to conduct a successful capital campaign.

#### **Section 4. Project Proposal and Size of Goal**

Fifteen out of the 22 survey respondents approved of the proposed capital campaign. Another four respondents approved of the proposed capital campaign with exceptions, and three respondents were not sure.

When asked if they thought the community would donate \$10 million over a five-year pledge period, ten (48%) of the responding leadership members shared that they didn’t know. Some of whom responded that they didn’t know had a more positive outlook, *“I’m not sure the expansion has been promoted enough. It’s less about the amount than awareness.”*

Eight surveyors responded yes community members would contribute \$10 million over five-years and the remaining four leadership members responded no.

When asked how they would rate the difficulty of raising money, with 1 being very easy and 10 being very difficult, the average of the twenty-one respondents was 7.1.

Seventeen leadership members who responded to the survey said they would endorse the campaign. *“The library is too cramped. They don’t have space to expand offerings. They hold programs off site. They are a community service. Other city projects have proceeded. It’s the library’s turn,”* said one respondent.

In terms of obstacles that could affect the Jefferson Public Library’s campaign success, several were concerned about communication. One respondent noted, *“Communication between entities is very important for the success of this campaign. If there is good communication, we have a good chance at this, there is also a chance that we may need help to increase communication.”* Another stated, *“Limited pool of donors in an aging, shrinking town.”*

Respondents also noted the economy and other community needs in the area could impact the success of the Jefferson Public Library’s drive. One member stated, *“There are a lot of ongoing 'needs' in the county and community – new Law Enforcement Building, city streets, etc.”* Another mentioned, *“People are currently nervous about the economy. While it was debatable if the economy was poor prior to the election, there's no doubt people will have less disposable income if high tariffs are imposed.”*

## Section 5. Giving Potential and Leadership

To set an example for the public, leadership giving often totals 10% to 15% of a campaign goal (\$1,000,000 to \$1,500,000 for a \$10 million campaign). When asked the range of dollars they would anticipate donating to the campaign, 20 respondents indicated their gifts over a five-year period would collectively range less than one percent of the campaign goal.

Giving is personal and must be respected and appreciated by all. Critical to a campaign’s success is the financial commitment of **every member of the leadership**. The Jefferson Public Library leadership will need to show the community at large 100% participation toward the campaign goal. Unanimous participation is essential **before** asking the community for support.

Working on the campaign is no less important than giving to the campaign. It is extremely important to have volunteer leadership involved in one way or another. Three survey respondents said they would be interested in serving on a campaign steering committee. Nine leadership respondents said they might consider serving on a campaign steering committee.

Not all members of the Jefferson Public Library’s volunteer leadership must serve on the campaign committee, but their abilities to do tasks that are appropriate for their skills and talents should not be overlooked.

The importance of volunteer involvement and commitment in a campaign cannot be overstated. It is the **single most important criterion** of a campaign's success. Volunteer leadership sets the example. Their involvement will send a message to the prospects and the community.



# Organizational Readiness

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To gain a sense of the Jefferson Public Library's readiness to conduct a fundraising campaign, an organizational assessment of the library's operations and fundraising activities was conducted.

## **Section 1. Personnel and Involvement**

The Jefferson Public Library has a total of ten employees who assist the adult, student and children's departments, and serve in administrative and custodian services. A full-time Library Director, Jane Millard, has served the library since 2000. Ms. Millard spends approximately 25% of her time talking about the library's budget and 10% of her time sharing the needs of the library with others. Staff members speak to service organizations once a year, these include Rotary, Kiwanis and two separate sororities.

## **Section 2. Development Activities**

The Jefferson Public Library Board of Trustees does not actively fundraise for the organization. The board spends approximately a quarter of their time on the library budget. The Friends of the Library Board of Directors currently has 10 members. One member is currently focused on writing grants for the library, one hosts book sales throughout the year, and another is responsible for securing new members.

## **Section 3. Marketing, Communications and Public Relations**

The main targeted audiences for the library are residents in Jefferson and surrounding communities in Greene County. The goal of the library is to reach all age groups from young children to adults.

## **Section 4. Marketing Collateral**

The Jefferson Public Library produces a monthly newsletter highlighting upcoming programs and news. The newsletter is mailed via USPS and sent electronically for those patrons who have listed an email address. Approximately 100-200 newsletters are mailed out monthly, and the newsletter is available at the library counter for those who visit in-person. The newsletter is also made available on the library website and delivered to various businesses around town for cross-promotion. The Jefferson Chamber promotes library events in their member e-blast send once a week. The library does not have additional fundraising collateral material such as a brochure or ways individuals can support the library.

The Jefferson Public Library is a member of the Iowa Library Association. As required by the State Library Association, the Jefferson Public Library has a strategic plan. It is a five-year plan with a year extension and will expire in 2026. The library expansion is not part of the plan but more visionary in scope and includes details on maintenance, collections, programs and services.

## **Section 5. Volunteers**

In addition to the Jefferson Public Library's leadership of the Board of Trustees and Friends of the Library, volunteers serve the library in various roles to stock books on shelves as well as assist with programs and maintenance around the library.

# SPOT Analysis

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## 1. Strengths

- Library seen as activity hub and resource for all generations from youth to seniors.
- Location of the library in town square is easily accessible to residents.
- Longevity of some members of the library's leadership.
- Jefferson and Greene County residents have supported past community projects.

## 2. Problems

- Space is not adequate to accommodate the size of the City of Jefferson's programs and needs.
- Lack of individuals volunteering to take on campaign leadership roles or make campaign gift asks.
- No fundraising policies and procedures in place for soliciting and accepting gifts for the campaign.
- Lack of City's investment in the library to support full-time hours and commitment to provide financial resources into a future expansion.
- Mixed feelings about library and City leadership to lead campaign fundraising efforts among community members.
- Few prospects identified who could make lead gifts to the campaign.

## 3. Opportunities

- Ability to update and expand space to stock more collections and host programs and events and have more age-designated spaces in the library for patrons.
- Engage community members to include the Jefferson Public Library as part of their charitable giving.
- New potential partnerships with other community organizations with an expanded library.

#### **4. Threats**

- Donor fatigue from other recent campaigns and bond referendums that have increased property taxes for Jefferson residents.
- Any downturn in the economy or workforce layoffs may lead to decreased funds and assets that community members can contribute to a campaign.

# **Findings & Recommendations**

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The study conducted on behalf of the Jefferson Public Library provided insights into how community members perceived the nonprofit organization and their proposed plans to expand the library.

The following summarizes our impressions of your fundraising capability and how the Jefferson Public Library's study results compare to other AMPERAGE studies that have moved ahead with successful campaigns.

## **Image**

- Eighty-two percent of respondents said the Jefferson Public Library has a very good or good image. This is on par with the average 82% for AMPERAGE studies that move ahead successfully with a campaign.

## **Board and Administration**

- Ninety-seven percent of respondents said they know at least some of the Jefferson Public Library's leadership from its Library Board of Trustees and Friends of the Library Board of Directors. Eighty-seven percent of interviewees also shared that at least some were viewed as leaders in the community. This ranks above the 90% and 59%, respectively we hear on average for these questions.
- Seventy-two percent of interviewees felt that all, most or some of the Jefferson Public Library's leadership could raise major gifts for the campaign. This is below the average 75% response on this question in AMPERAGE studies that successfully move forward.

## **Project Scope**

- Forty-four percent of respondents felt that the scope of the project was correct. Average campaigns that move ahead successfully report a 59% response. It should be noted that a third of the respondents wanted to learn

more information about the project before determining if the project scope was correct in size.

- Fifty-six percent of respondents were very receptive or receptive to the proposed project. This is below the 70% average in AMPERAGE studies that successfully conduct a campaign. However, 41% said they were somewhat receptive with exceptions.
- Twenty-three percent of the interviewees believed the community at large would be supportive of the proposed project. This is below our average response rate of 52% for campaigns that move ahead. It should be noted that 59% felt the community would be somewhat supportive of the project to expand the Jefferson Public Library.
- Thirty-six percent of interviewees believed the \$10 million campaign goal was realistic and attainable over a five-year pledge period. This is below the average 57% response for AMPERAGE studies that have successfully moved ahead.
- Sixty-seven percent of interviewees would endorse the campaign, and 23% might. Average endorsement rates in AMPERAGE studies that successfully move forward are 71% who would and 15% who might.

### **Giving Capacity**

- The average self-reported giving rate of AMPERAGE campaigns that have successfully raised their tested goal range from 25% to 34%. Those that have moved forward and successfully raised a slightly reduced goal (at least 60% of the tested goal) average 22% to 32% in self-reported giving. We further examined the self-reported giving for the Jefferson Public Library proposed campaign:
  - Total self-reported giving from the interviewees and library leadership members surveyed ranged between **\$524,122 and \$1,430,974 or 5.2% - 14.3% of the \$10 million tested goal.**

### **Volunteer Interest**

- Seventeen interviewees (44%) among the readiness study participants stated they would assist or might assist in making calls to ask for a campaign gift. This is above the average 29% response obtained in an AMPERAGE study.

### **Recommendations**

The readiness study benefited the Jefferson Public Library in a variety of ways. Participants developed ownership in the library by having the opportunity to voice their opinions and share their perceptions about the Jefferson Public Library, its programs and future plans. Additionally, the educational factor must not be overlooked as a valued outcome. Many learned about the Jefferson Public Library's needs to expand to accommodate current patrons and programs.

As previously stated, the readiness study's purpose was to determine your ability to raise campaign funds for your current project needs. **After analysis and thoughtful consideration of the information gathered from the interviews, leadership assessment survey and organizational assessment, we recommend that the Jefferson Public Library proceed with a capital campaign after the project scope and fundraising structure is established with a suggested campaign goal of \$3 million over a five-year pledge period.**

We present the following steps to move forward for future success.

#### **1. Finalize the project scope and timeline for campaign.**

With the campaign goal of \$3 million in mind, finalize the scope of the expansion project. Will it include purchase of additional property, renovation of existing structure, etc.? Work with a contractor to determine what items of expansion can be accomplished with the achievable fundraising goal. Additionally, a timeline for the campaign and project construction should be determined with the input from the City of Jefferson and how the library expansion project fits in with the city's improvement plan and timeline.

## **2. Ensure all City of Jefferson and library leaders are on board with the proposed project and campaign plan.**

During the readiness study, some of the interviewees and leadership of the Jefferson Public Library shared some hesitation of the library expansion without fully understanding the proposed plans and need for the expansion. Providing a clear plan for the expansion project will help others visualize the impact an expanded library can offer the community. All must be comfortable with the campaign approach and finalized project plans to successfully move forward.

## **3. Establish fundraising operations for a campaign.**

The Jefferson Public Library currently does not have consistent fundraising activities or a database of regular donors to support the library. Prospective donors will need to know that the Jefferson Public Library is an option to support with charitable gifts. Developing an infrastructure for fundraising campaign activities is essential for campaign success. To establish fundraising operations, the following should be considered:

- **Determine nonprofit entity to accept gifts on behalf of the Jefferson Public Library expansion project.** Potential entities with nonprofit designations could offer library donors a tax-deduction for gifts made to the campaign. This may be the Friends of the Jefferson Public Library or Greene County Community Foundation. If these entities are not viable options, then the library may want to consider establishing its own library foundation.
- **Designate a point of contact to oversee campaign fundraising activities.** Managing and coordinating logistics for a capital campaign can be a full-time job. Library staff cannot be expected to run a capital campaign while also performing their regular library duties. To stay focused on the campaign goal, meet with campaign prospects, and manage volunteers and campaign activities, it is recommended that one person be dedicated strictly for the capital campaign with the assistance of the library director, library board of trustees and campaign steering committee. Many aspects of a capital campaign include time-sensitive tasks requiring a person dedicated to being the point of contact for donors, volunteers and other team members related to campaign affairs. Library staff may not always be able to respond promptly to these tasks when they have other duties on their plate.



- **Create a system to track donations, pledges and acknowledgements to the campaign.** It is expected that during a capital campaign, the Jefferson Public Library will be accepting more cash donations than it has in its existence. The library may want to consider investing in CRM software or a more robust accounting system to record gifts, send pledge invoices, acknowledge gifts and prepare campaign reports to the library leadership. This will also provide those managing the campaign with up-to-date statistics of funds raised toward the campaign and the ability to pull and share campaign reports with campaign volunteers and library and city leadership.
- **Draft gift acceptance policies and procedures.** Procedures for accepting, tracking and acknowledging gifts toward the Jefferson Public Library campaign should be established to identify who will record campaign gifts, open mail with donations, oversee online giving activities, deposit campaign donations and provide gift receipts to campaign donors. There should be a separation of these duties among library personnel or volunteers so that no one person is handling the entire gift receipt process. Additionally, the library should establish policies for non-cash gifts such as IRAs, stocks and securities and gifts of grain as these gift opportunities may be appealing for gift prospects who farm or are of an older demographic in which these gifts may be more contributable than cash.

#### **4. Organize a campaign steering committee to oversee direction of fundraising activities and make gift asks on behalf of the library expansion project.**

A campaign steering committee should be recruited and formed as soon as the finalized project scope, plans and timeline are known. This includes campaign co-chairs and possibly an honorary chair that can help lead the campaign efforts alongside the Jefferson Public Library's leadership. Although nearly half of the interviewees from the study indicated they may help identify potential campaign donors, there were few that offered to serve on a campaign steering committee or shared they would help in making gift asks for the campaign. Many volunteers will be needed to fulfill campaign duties and reach a larger network of potential campaign donors. People give to people who they know and trust.

### **5. Secure and promote endorsements from key community players.**

Prospective donors will want to know if area communities, schools and nonprofit organizations are behind your project. Seek involvement from city, school and community leaders to help spread the word and promote the exciting expansion of the Jefferson Public Library. Leaders in these areas are key as prospective donors will see them as a barometer of a worthy project.

Note: An endorsement is the first step to securing a gift.

### **6. Develop messaging about the need for the library's expansion and demonstrate numbers of residents impacted by increasing the library's footprint in the community.**

Some residents may need to be educated about the current relevancy of libraries; how libraries have changed over the last 30, 20, 10 years; types of programs and services offered at the community library and the number of patrons served each year. The more community residents know about the impact the library has on Jefferson's social and economic attributes; the more residents will be convinced that the library is worth the investment.

### **7. Develop a case for support and other campaign marketing materials.**

The Association of Fundraising Professionals defines the case statement as, "The centralization or documentation of all information describing the organization: needs, goals, objectives, strategies, tasks, facilities, budget, institutional plans, financial history, personnel and staff competence to serve the mission or the cause the organization presents."

A case statement must inform, inspire and induce action. When creating your final case for the campaign, you will need to explain specifically what's included in the campaign and provide a rationale that will encourage prospects to support the campaign. Illustrating a clear and specific need, and how parts of this campaign address those needs, will be essential in motivating donors to stretch their gifts beyond what they might typically give.

The case for support should be its own separate campaign marketing piece that can be left behind after a prospect visit or distributed electronically to a funder considering financial support.

A campaign theme and logo can provide identity and recognition of the project to your campaign prospects. The theme and logo should be carried throughout all your campaign marketing materials, including pledge sheets, envelopes, letterhead and note cards, to name a few.

In addition to your campaign case statement, naming opportunities for the project need to be created. Your case statement can include these donor recognition opportunities and how they will be promoted, or a separate collateral piece may be developed and updated as naming opportunities are secured. Donors are often motivated to stretch their campaign gift if there is a naming opportunity designated for major gift levels.

You may also consider creating a campaign video to convey your message and case for support. No other medium can tell your story as well as video. The combination of sight and sound creates an emotional experience for the potential donor. Giving decisions come from the heart as well as the head. Well-produced videos for use at different stages of the campaign can cover the details while creating that emotional bond between the organization and the donor.

## **8. Identify, cultivate and solicit your leadership and major donors.**

Begin building your donor and prospect list based on past donations, names mentioned from the readiness study and donors who have given to other campaigns in the area. You may also consider including a list of your library card holders or purchase a list of residents in Jefferson and the surrounding area and have the list(s) screened for gift interest and capacity to give toward your campaign. For those on your lists that may have the potential to make a lead gift to your campaign, start the cultivation by sharing the readiness study in private meetings, along with the steps you've implemented from the recommendations. Securing advance gifts from a small, select group of people adds credibility and enthusiasm. It also sets a benchmark for other prospects. Securing more than half of your goal before the public portion of the campaign begins will put you well on your way to campaign success.

### **9. Host community meetings highlighting future library expansion plans.**

Invite the public to meetings or Open House to share the latest library expansion plans, architectural renderings and updates as they relate to the campaign. This is also a good chance for community members to share their feedback and feel as if they are contributing toward the library's expansion project.

### **10. Identify and seek grant opportunities.**

A few grant opportunities were identified during the readiness study process. Connection to these grant funders should occur early in the campaign to learn of each grant funders' priorities, guidelines and timeframe for which they will review your grant application. Some funders only accept applications once a year. Others may only consider your project if over half of the campaign funds have been raised. Understanding each grant funders' guidelines can help you determine where to apply within your campaign timeline.

### **11. Seek challenges and matches.**

Remember to utilize matching and challenge gift opportunities when seeking gifts from individuals. Matching gifts from employers can double or even triple donations given to the campaign. Some area employers may not contribute toward a campaign, but they will support their employees' philanthropic interests by matching gifts contributed to a nonprofit organization.

### **12. Retain fundraising counsel.**

The size of the undertaking, the need for professional education and training, the ability to organize and coordinate steps along the way and addressing issues that come up along the way point to a partnership between your organization and outside fundraising counsel.

## **Appendix A**



### **Library Board of Trustees**

Adam Pedersen, President

Tom Yepsen, Secretary

Hollie Roberts

Alexis Stevens

Clancy Clawson

### **Friends of the Library Board of Directors**

Jennifer Powers, President

Wendy Taylor, Vice President

Sarah Erickson, Secretary

Kathy Marshall, Treasurer/Membership Chair

Ada Ross, Historian

Ginny Showman, Promotions Chair/Director

Renee Carhill, Volunteer Coordinator/Director

Barb Labate, Book Sale Chair

Connie Boyd

Tori Riley

### **Library Director**

Jane Millard

# Appendix B



## Jefferson Public Library Campaign Goal of \$10,000,000

	# Gifts	# Gift	Gift	\$ Amount	Cumulative
	In Range	Prospects	Value	in Range	Total
<b>Leadership</b>	1	4	\$ 1,000,000	\$ 1,000,000	\$ 1,000,000
	2	8	\$ 500,000	\$ 1,000,000	\$ 2,000,000
	4	12	\$ 250,000	\$ 1,000,000	\$ 3,000,000
	6	18	\$ 100,000	\$ 600,000	\$ 3,600,000
	16	48	\$ 50,000	\$ 800,000	\$ 4,400,000
	30	90	\$ 25,000	\$ 750,000	\$ 5,150,000
	52	156	\$ 15,000	\$ 780,000	\$ 5,930,000
	<b>111</b>	<b>336</b>		<b>\$ 5,930,000</b>	
<b>Major</b>	68	204	\$ 10,000	\$ 680,000	\$ 6,610,000
	98	294	\$ 5,000	\$ 490,000	\$ 7,100,000
	200	600	\$ 2,500	\$ 500,000	\$ 7,600,000
	400	1000	\$ 1,000	\$ 400,000	\$ 8,000,000
	<b>766</b>	<b>2098</b>		<b>\$ 2,070,000</b>	
<b>General</b>	All Others	Below	\$ 1,000	<b>\$ 2,000,000</b>	<b>\$ 10,000,000</b>

## Appendix C



### **We love a good story. This one is special.**

Imagine you have been gifted a box that is both beautiful on the outside and perfect for storing a special collection on the inside. That collection is priceless, and yet, you share it with anyone who asks. Time passes, and more and more precious items — some the same kind of treasure, some different, all equally valuable — join the collection. More and more people want to access the box and its treasures. Sometimes even groups of people would like to use those treasures together. But the box, like all but the most magical of containers, is limited in size. If you are going to continue making its amazing contents available to one and all, there is really only one solution. You are going to need a bigger box.

### **Plot twist: It's the story of the Jefferson Public Library.**

The Jefferson Public Library was founded in 1901, and like so many libraries of the time, construction of its building was funded by the Carnegie Foundation in 1903. In 1966, an addition was built to house the library's growing collection of books and other resources. Other renovations over time have improved the building's accessibility to users, allowed for the acquisition and sharing of more resources, and helped address changing trends in library usage and services.

Today, nearly 125 years after its founding, the library is an essential and vibrant place that provides the community with access to many treasures:

- Books (print, audio, and digital)
- Computer and internet access
- Meeting spaces
- Study areas
- Early literacy resources for children and students
- Hands-on learning resources
- An innovation station
- Educational programs for all ages
- Resources for local history and genealogy research
- Exam proctoring
- Device charging stations
- A photo printing kiosk

That's a lot to fit into a building that was built in the early 1900s for a limited collection. And so, the Jefferson Public Library is seeking funding to increase the size of the library from 8,000 square feet to 24,000 square feet, as recommended by an architectural feasibility study conducted in 2022.

### **The Jefferson Public Library is an economic engine.**

Because so many library services are provided at no cost to community members, it might seem odd to think of the Jefferson Public Library as a powerful force in the local economy, but it's true. The library's economic impact is no fairytale.

A review of multiple studies shows that:

- Libraries serve as a catalyst for job creation and skills development (American Library Association)
- Well-equipped libraries can positively impact property values (Urban Land Institute)
- Libraries serve as incubators for small businesses and the entrepreneurs who create them (Brookings Institution)
- Library programs can build community engagement and tourism (Knight Foundation)
- Resources available at a public library help to bridge the "digital divide" (Digital Inclusion Survey)
- Libraries provide educational and development support to young people that can improve their long-term economic success (National Bureau of Economic Research)

Libraries are much more than a place to check out books. They are community hubs connecting individuals of all ages through educational programming, technology and creative resources, social gatherings and more.

### **Some other stories you may have heard ...**

These days, the value of a strong public library is not as immediately obvious to everyone as it has been in the past. In fact, many people have misconceptions about libraries and their role today. We want to address some of these storylines here.

*The current library is fine, especially since no one checks out books anymore.*

More than 31,000 items (books and more) were checked out from the Jefferson Public Library last year. We believe that number would be even higher if the library were less crowded and more inviting. After all, a 2019 Gallup poll found that Americans are more likely to visit a library than go to a movie theater, attend a sporting event or go to a concert.

*With digital resources, no one actually goes to the library anymore.*

It is true that our substantial digital collection means that some library users do not need to come to our physical space as they would have in the past. And yet, over 30,500 visits were logged (or almost 57,000 uses) last year at the library. That number jumps to almost 64,000 when you include residents who attended one of the 267 programs offered at the library last year.

*Well, if all these people are coming to the library and using its services already, why does it need to be expanded?*

Based on the architectural study conducted by renowned library planner George Lawson, the Jefferson Public Library should be at least 12,000 square feet just to offer the level of programming and resources we offer now. That's 4,000 square feet more than we currently have.



We want to be useful to our community not just today, but long into the future. So, to meet evolving needs and continue to serve as a treasure trove for patrons for years to come, the plan is to more than double in size to 24,000 square feet.

As it is today, the building is not compliant with the Americans with Disabilities Act, which means it's not accessible to everyone. It also lacks adequate workspace for staff and is not well positioned for continued growth and change over time.

*It would be terrible if the Carnegie building were torn down! It's so lovely.*

We agree, and we want to be clear that there are no plans to tear down the original library. Expansion of the Carnegie building is one option among several, but no one is proposing the destruction of this treasured community landmark.

*And how are you going to pay for all of this?*

We are leaning on multiple funding sources. This fundraising feasibility study is largely funded by a grant to the City of Jefferson from Grow Greene. The building project itself will be funded by private donations, grant funding, possible TIF dollars, and city and county contributions as available. A bond referendum would be pursued only if necessary.

### **To make a long story short ...**

The Jefferson Public Library is a community treasure. To ensure that it continues to be a vibrant and vital part of the fabric of Jefferson and the surrounding region, we need to look to the future and acknowledge the clear need for more space, enhanced educational programs that will provide more access to technology and innovative literary programs that will serve all ages and add to the quality of life of local residents.

### **Help us write the next chapter.**

Our library positively impacts the quality of life and social well-being of residents of Jefferson and the surrounding area, and an appropriately sized facility will enable the library to continue to provide its vital, community-building services for another 125 years.

The Jefferson Public Library has asked AMPERAGE Marketing & Fundraising to assess the organization's readiness to raise \$10 million in private funding to create a larger, up-to-date library. Your participation in this study will help the library find the best path forward.