December 13, 2018

To: **Stillwater County Library/County Center Steering Committee**

From: **Kevin Johnson**

RE: **Final Fundraising Possibilities Report**

As part of the committee charge I assisted committee members in helping describe community needs that could be of interest to prospective private donors and to assess whether or not there was potential for private funding of a project like this.

About a year and a half ago, we began by identifying and vetting names of people who committee and community members believed could be interested in helping in a project like this. The most effective method of fundraising for large gifts is involvement, not selling or presenting a finished idea. This principle guided our interactions.

We asked for community help to create a tool to give structure to our planned conversations with prospective supporters. This conversation guide was used in small groups and one-on-one conversations. Conversations were conducted by me in the county with committee members and by committee members individually and in teams of two.

Since this was a primarily a volunteer effort, we had to accommodate changing schedules of volunteers and interviewees. We had hoped to complete more interviews than we did but those that were conducted are sufficient to guide answers to a number of key questions.

The committee posed four questions as the basis for a report summarizing this aspect of the process in the context of private funding for a Library/county project:

1. Is there private funding capacity present in Stillwater?

Yes. There is the potential for a number of larger gifts to support this kind of community-oriented project.

2. Is there support for the project?

Based on conversations with a range of local residents, business owners, and organization representatives, the answer is yes.

3. In your professional capacity, do you think we could raise substantial funds for this project?

There is potential for a number of larger gifts and, likely, many smaller ones. We don't yet have enough data to forecast a specific amount.

4. In your opinion what is the importance of projects like this to rural communities like ours?

Having worked with groups in rural communities in Montana, Idaho, Oregon, Washington, Alaska, Arizona, New Mexico, South Dakota, North Dakota and British Columbia, the community building value of this kind of project cannot be underestimated.

Sincerely yours,

Kevin Johnson

Attachments:

1. Report
2. Sample email invitation letter to prospective supporters
3. Appointment call script sample
4. Background about author Kevin Johnson, Retriever Development Counsel, LLC
5. Conversation guide used in conversations. The guide was developed using conversations with supporters and committee members and was/is an evolving tool.

Fundraising Possibilities Report

Q. Is there private funding capacity present in Stillwater?

A. Yes. There is the potential for a number of larger gifts to support this kind of community-oriented project.

- The region has a tradition of helping neighbors. The history is deep when it comes to smaller gifts but because there is little history of local, large gifts that makes it hard sometimes to see the potential for larger gifts that does exist. This is a large project; it's large enough to be worthy of larger gifts.

- However, these larger gifts will have to be earned. By earned I mean that the project will have to reflect what community members need. It can't be seen as anyone's personal project and everyone at every giving level needs to feel as though they played an important part in the effort. In short, it has to reflect the needs and interests of the community.

- This kind of project is too large for only private support. There isn't the ingrained experience of giving larger gifts and there are social dynamics that sometimes make potential givers reticent to be viewed as one of a few who could complete a larger gift.

- Your campaign for the project won't look the same as the big university or regional hospital. Instead, focus on increasing the number of people involved and connected which is the first step toward any successful fundraising effort. Successful fundraising today is not about selling or pitching a product; it is about relationships and the impact of the gifts.

- Our interviews included the right kinds of community leaders. We asked others to vet our lists and names were added and subtracted based on advice of many. Some who were invited to participate wished to be involved but could not because of travel or other commitments.

Q. Is there support for the project?

A. Based on conversations with a range of local residents, business owners, and organization representatives, the answer is yes.

- Of course, there were questions that surfaced during the conversations but the tone and type of questions trended toward supportive interest and due diligence rather than antagonism or intent to undermine.

- Questions are to be expected. It is important to use draft plans to spur and encourage discussion and to be open to change. The combination of a public and private approach is a difficult one. Often public officials will fear they are losing too much control while private supporters feel the whole thing is going too slow and they think public officials are scared of making up their minds. This is to be expected when out of necessity you combine two different revenue development approaches. But we don't have other options short of winning a big Powerball jackpot.

- If you get sidetracked and end up discussing the details or focusing narrowly on a single aspect of the project, you will have to re-focus and return to the bigger picture of what the project means for the community. Use the details as a way to clarify the big picture "why we are doing this project" perspective. It's easy to attack the messengers but it does not serve the community to allow or accept that kind of approach.

Q. In your professional capacity, do you think we could raise substantial funds for this project?

A. There is potential for a number of larger gifts and, likely, many smaller ones. We don't have enough data to forecast a specific amount.

- As to how much or a specific estimated total, due to changes in our plans and process we did not interview enough people to confidently establish a baseline number.

- Based on my observations from structure conversations, using a written conversation guide, is that there is support and interest.

  ⇒ There is an undercurrent of "who will go first." This dynamic applies to public officials as well as prospective private donors.
  ⇒ There is uncertainty about how large (or small) public and private efforts should be sized. This is ultimately a choice.

- In traditional feasibility studies of this kind we might have conducted 40-60 interviews. Due to cost constraints this scale of approach was taken off the table immediately. Our original plans called for more interviews and small group conversations with prospective supporters than our team was able to complete. Those conducted were of high quality and enough in number to confidently demonstrate support and interest regarding the project.

Q. In your opinion what is the importance of projects like this to rural communities like ours?

A. Having worked with groups in rural communities in Montana, Idaho, Oregon, Washington, Alaska, Arizona, New Mexico, South Dakota, North Dakota and British Columbia, the community building value of this kind of project cannot be underestimated.

What it means to live in a rural area is fast changing. What kind of community will thrive in the next 10-30 years? Will it end up being just a bedroom community; will it grow or wither because staying the same isn't possible?

In order to be serious about economic development, the community has to be attractive to existing employers as well as prospective employers. This kind of project shows off community spirit well. Many things we have little to no control over. What do we have control over? Some of those things include local education, making a good place to raise kids, sufficient community infrastructure, and whether local government takes good care of its all citizens.

In communities that seem to thrive, voters and leaders look to the future as citizens who care rather than victimized taxpayers. The distinction is important. What will you choose to create TOGETHER? That's the kind of spirit that will maintain community fabric and begin to attract others who want to be part of that future.

I don't see this project as a single thing or even as a collection of activities conveniently located in one physical location. This place can become a central rallying point for the entire community to declare out loud that "we see a strong future here" and others are welcome to join us as we grow and thrive in the coming years. Along with a community spirit, many things that seemed improbable could become possible.

I recall driving along Main Street in Bozeman in the early 1990s. Then I could never have imagined the kind of place it is today. I know you don't want to become Bozeman, but the point is that without focus, without strong collaboration between public officials and community leaders, you won't have choices and you may not like what you end up with.

Notes/References:

https://www.fastcompany.com/40419011/how-tiny-bozeman-montana-became-a-booming-tech-town

https://www.bozemandailychronicle.com/news/city/big-sky-crowded-growth-density-and-the-future-of-the/article_62038e76-8783-5b64-a900-466cfb0a29fd.html

https://www.hcn.org/articles/the-montana-gap-has-fort-collins-grown-too-big-too-fast

Attachment : Sample Email invitation

Email to _____

Subject line: Stillwater Cty -Can you help with advice (no money ask)?

Dear _____-,

A group of civic minded volunteers from throughout Stillwater County have been working on sketching out ideas on how best to create a new community center. We have some ideas ready to present for consideration and discussion.

We would greatly appreciate your advice and wisdom as we continue to solidify our plans for the future.

Our Committee and other community allies are thinking carefully about our next steps and have ideas on which we would appreciate your feedback. I recognize the two of you travel a great deal and we would be happy to set this up online or over the phone on a private conference line.

We estimate that it could cost about $6.5 million to build and open a center the right size to meet residents needs and interests. A combination of individuals, businesses, and state and local public sources will be combined to build the center – no one group can do it alone.

If you have the time to help, to sit down and talk with us, we will send you an outline that reveals our updated thinking.

We estimate our conversation will take about 45 to 60 minutes. If you have the time to help, we will send you an outline to help guide and make the best use of our time during the conversation.

If you know a time that works best right now, please contact Marissa Hauge (406)322-8050 or email her at mhauge@stillwater.mt.gov.

In our conversation with you, we will focus on what stands out to you about the vision and potential of this project, what you believe our top priorities could be, the degree of your potential support, and how we can best plan for the future. You will not be asked for money at this time.

Your participation will help tremendously as together, we move forward. Thank you. We look forward to hearing from you.

Sincerely yours,

INSERT NAM,

Working Group Member

P.S. This letter is about a request for advice and counsel. It is not intended as a gift solicitation and you will not be asked for a binding pledge or gift at the time of our conversation.

Attachment: Sample Calling Script

Hi, my name is _____
and I am _____ (a volunteer/staff/board member)
calling from _____

This is not a fundraising call.

I was wondering if you had just a moment to talk.

(Pause)

I am calling about the letter mailed to you from the community center committee. It was an invitation for a conversation to help _____ plan for the future.

You have supported important work in our community _____ for a number of years and a number of others thought it would be important to include your opinions and advice as we review options and opportunities.

Could you help?

Would you have time to sit down with one of our volunteers or staff sometime in the next couple of weeks to give us your feedback? You won't be asked for a gift at that time.

In advance of the conversation we will send you a packet of information.

We'll use that packet you got as an agenda for the conversation. You might also have some other ideas we would want to explore too. We'll report it all back to the steering committee – and then in a formal report to the County Commission. Of course, we will report what we heard, but not WHO said.

Optional:
Sometimes people don't think they have much to say – but so far, in conversations we have had to date, even the most quiet of people seem to have found a strong voice.

We want to make sure yours is heard. And that's been really helpful to the steering committee as we collect advice and ideas.

Some people like us to meet them at their home, sometimes it's a coffee shop or restaurant that's convenient. Others like to drop by at their workplace. We could meet you wherever is most convenient for you.

IF YES

We will confirm the time with you and send you the packet of information several days in advance of the conversation. We are having a number of these conversations and we are updating the materials as we talk with long time supporters to make sure we share what we learned with everybody involved.

What's the best way to stay in touch with you about this conversation?

IF NO

I'm sorry you won't be able to meet.

Would you like us to keep you up to date on the results of the conversations?

What's the best way to stay in touch with you about this conversation?

Kevin Johnson is a nationally recognized consultant serving nonprofit leaders throughout the United States and Canada. His work focuses on how to connect vision and ideas with resources – people, networks, money, media – to turn good ideas into reality.

In recent years he has helped shape and guide more than 114 strategic, capital and development projects on behalf of a range of education, social, health, and conservation causes throughout the US and Canada with initiatives with goals of a few hundred thousand dollars to those with objectives exceeding several hundred million dollars.

He is the author of *The Power of Legacy and Planned Gifts: How Nonprofits and Donors Work Together to Change the World* published by Jossey-Bass/Wiley endorsed by Bill Gates, Sr. He is author of five of the annual Philanthropy Trends Surveys published by Association of Fundraising Professionals' (AFP) .

Kevin has a mix of business and nonprofit experience. He helped start three technology-based companies in Silicon Valley and, as general partner, a service company employing 34. He also managed a mid-size consulting firm of Ph.D. psychologists providing executive leadership training throughout the United States, and later served as the acting deputy director of a national management training center serving more than 21,000 executives and managers annually. He was the executive director of a state political party leading more than 100 staff and 2,000 volunteers and, once upon a time, was multi-state award winning broadcast news reporter. He founded Retriever Development Counsel, LLC in 1998.

About his work, Kevin says, "I look for people with passion and how best to connect them and combine efforts in order to make possible larger objectives. Working together gets larger, more lasting results."

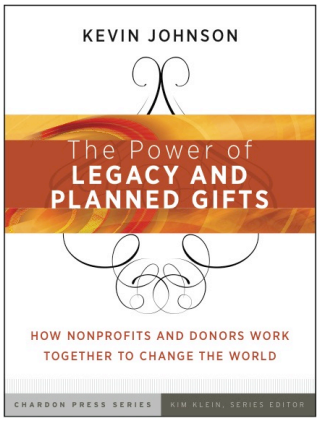
He provides training, counsel, and strategic planning assistance to nonprofit leaders and groups. His practice began with a focus on major legacy gifts. Over time, growing numbers of executive directors and board presidents asked him to coach them as they embarked on new strategic initiatives or capital campaigns, as well as to facilitate leadership retreats and planning processes.

Kevin is regularly invited to speak at regional and national conferences. The editor of a national publication described one of Kevin's workshops about linking strategic objectives and fundraising outcomes as "the best I have heard on the topic in my 17 years as an editor."

Kevin has lived and traveled all over the West. Prior to living in Oregon, he lived in California, Arizona, Washington, DC, Vermont, and in rural woods of Washington, where he built an all-solar, self-sufficient homestead complete with orchard, horses, dogs, cats, and chickens. While living in the woods, he built and chaired a 2,000 person environmental citizens action group that was acknowledged nationally for its work. Today, Kevin and his wife Stephanie live in Portland, Oregon where they have jammed as many blueberry bushes, raspberry vines, and trees as they can into what was once the lawn.

Client Comments:

"Kevin is amazing! He provided high-level expert advice that helped to guide our discussions in a very productive direction. He was able to allow free-flowing conversation while also providing guideposts to keep us on track. Most of all, Kevin's expansive knowledge base regarding fund-raising, economics and finance was invaluable!" *Nonprofit board member*



"Kevin is a great 'booster'. Not only does he make me feel like I can tackle what I need to do, he gives me to tools to do it and lets me know we can check in along the way if I need extra support." *Executive Director*

"Kevin provided advice that still guides me these many years later." *University Foundation President*

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