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MOVE THE NEEDLE

Easter Lake Lodge  
**FEASIBILITY STUDY**

April 2018

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Submitted by  
Tyler Timko, MBA, Regional Fundraising Adviser



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April 2018

Conservation Board and Feasibility Study Committee Members  
Polk County Conservation Board  
11407 NW Jester Park Dr.  
Granger, Iowa 50109

Dear Board and Committee Members:

On behalf of AMPERAGE, thank you for the opportunity to conduct the Easter Lake Lodge feasibility study. You should feel proud of the work you do and your reputation in the area.

Objectives of this study were to ascertain:

- Awareness and image of Polk County Conservation (PCC) and its services
- Perceived strengths and weaknesses of the project
- Reaction to the proposed plan
- Reaction to the financial goal
- Perceived likelihood of achieving the goal
- Reaction to specific parts of the proposed project
- Levels of giving for the project
- Availability of large gifts
- Availability of potential leadership for the campaign
- Overall readiness of the organization



Polk County Conservation  
Page Two

Data for the study was gathered through individual interviews with leaders whose judgment is highly respected. Findings from the interviews, compilation and analysis, and our recommendations are presented on the pages that follow.

It was a pleasure to speak with people around the area about PCC. Their candid opinions enabled us to conduct a thorough study of your project.

We appreciate the work of the feasibility study committee, and Doug Romig was instrumental in coordinating meetings and interviews, as well as providing requested information. Thank you for your assistance.

Each of you plays a very important role in this process. For any fundraising initiative, the full support of the organizational leadership is imperative. You, more than anyone, understand the mission of PCC and how this project fits within that. As Teddy Roosevelt noted:

*“There is a delight in the hardy life of the open. There are no words that can tell the hidden spirit of the wilderness that can reveal its mystery, its melancholy and its charm. The nation behaves well if it treats the natural resources as assets which it must turn over to the next generation increased and not impaired in value. Conservation means development as much as it does protection.”*

Thank you again for the opportunity to assist you with the Easter Lake Lodge feasibility study.

Sincerely,

Tyler Timko, MBA  
Regional Fundraising Adviser

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# **METHODOLOGY**





# Methodology

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A feasibility study is a process to discover an organization's potential to raise funds for a project through a capital campaign. The process measures the awareness level of your organization and the willingness of the area to support the proposed \$7 million campaign. A feasibility study also provides an accurate assessment of factors that might affect success.

To assess the factors that would affect the fundraising campaign for the Easter Lake Lodge, AMPERAGE:

1. Conducted 15 in-depth interviews with those whose input was viewed as important to the campaign's success.
2. Emailed to all and received surveys from nine members of the Easter Lake Steering Committee and Polk County Conservation Board. Two additional committee/board members were interviewed.
3. Examined the organization's campaign readiness and conducted a SPOT (Strengths, Problems, Opportunities, Threats) analysis.

The substance of the interviews and surveys tested the:

1. Awareness and image of Polk County Conservation and Easter Lake.
2. Perceived strengths and weaknesses of the organization, its programs and its services.
3. Proposed \$7 million fundraising goal.
4. Perceived likelihood of achieving the goal.
5. Reaction to the proposed project.
6. Levels of giving.
7. Availability of large gifts.



8. Availability of potential campaign leadership.
9. Organizational readiness.

Prior to the interviews, each participant received a preliminary case statement—a brief description of the project and its goals.

Tyler Timko, MBA, regional fundraising adviser, 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 PCC Board and the Easter Lake Steering Committee, the level of giving needed to reach the campaign goal, possible personal and/or corporate giving level and his or her interest in campaign leadership or involvement. To maintain confidentiality, actual interviews are anonymous. Representative responses and names of persons interviewed are included in this report.

The opinions of those interviewed and surveyed—community leaders, board members and feasibility study committee members—were to provide a reasonable measure of the probability of success of the proposed project and serve as the basis for our evaluation.



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# **EXECUTIVE SUMMARY: FINDINGS**





# Executive Summary: Findings

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

- Image
- Board and administration
- Campaign proposal
- Giving capacity
- 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 dealt with the image of PCC and Easter Lake.

### **1. Are you familiar with PCC, the people it serves, its programs and services?**

Very	9
Generally	3
Somewhat	3
Not	0

### **2. How do you know about PCC?**

### **3. What are PCC's most outstanding benefits to the area?**

### **4A. How would you describe PCC's image in the area?**

Very Good	1
Good	7
Fair	4
Poor	0
Don't Know	3



**4B. If you were the director of PCC, what would you do, if anything, to improve the image of the organization?**

**5A. Are you familiar with Easter Lake?**

Very	6
Generally	7
Somewhat	2
Not	0

**5B. How often do you visit Easter Lake?**

Weekly	1
Monthly	2
Few times a year	2
Rarely	3
Never	7

**5C. Are there other parks and/or recreational areas you utilize?**

## **Observations**

Everyone who was interviewed had at least some familiarity with PCC, with 60 percent saying they were very familiar with the organization. When asked how they know about PCC, just over half of the interviewees either held a formal position connected to the organization, or have worked on projects in association with PCC.

When asked to describe the benefits PCC provides to the area, the most frequently mentioned was preservation of parks and land (6), followed by water quality (5), recreation opportunities (4) and programming (1). One interviewee said, *“Environmental education is very strong. People don’t realize the infrastructure that goes into conservation. They provide a high level of service.”*

Interviewees were asked to describe PCC’s image in the area. Forty-seven percent described the image as good, followed by 27 percent who said fair,



and 7 percent that said very good. Many of the people that were unsure said PCC doesn't have a poor image, but it also just doesn't really have high public awareness. Examples included interviewees saying, *"I don't think they really know about it"* and *"I don't really think they have an image."*

When asked what PCC could be doing to enhance their image, six people answered that they could do a better job of telling people in the area what they do and the benefit to the community. One even suggested touting economic indicators, return on investment, etc. One person did suggest that they shouldn't bother trying to promote their image, but rather the image of the individual parks.

Everyone who was interviewed had at least some familiarity with Easter Lake, with 40 percent saying they were very familiar, and the remaining 60 percent who said they were generally or somewhat familiar. Answers ranged when asked how often interviewees visit Easter Lake, with most saying never (7), with three others answering rarely, two who said monthly, two that were a few times a year, and one who visited weekly.

Interviewees were asked if they utilize other parks, lakes or recreation areas. The most frequently mentioned were Gray's Lake, Saylorville, Raccoon River, Jester Park and Water Works Park.

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

The next questions in the interview focused on PCC's board and leadership, as well as the Easter Lake steering committee.

### **6A. Do you know or recognize the members of the Polk County Conservation Board?**

All	3
Most	1
Some	3
One or Two	5
None	3
Don't Know	0



**6B. Are they recognized as leaders in their communities?**

All	6
Most	1
Some	2
One or Two	0
None	5
Don't Know	1

**7A. Do you know or recognize the members of the Easter Lake Steering Committee?**

All	1
Most	3
Some	9
One or Two	2
None	0
Don't Know	0

**7B. Are they recognized as leaders in their communities?**

All	9
Most	1
Some	4
One or Two	1
None	0
Don't Know	0

**8. Do you think they (both groups) have the ability to raise major gifts for the capital campaign?**

All	2
Most	0
Some	7
One or two	0
None	1
Not Sure	5

**Why or why not?**



**9A. Is PCC viewed as a well-run organization?**

Yes	10
No	0
Don't Know	5

**Why or why not?**

**9B. Is PCC viewed as a financially sound organization?**

Yes	10
No	0
Don't Know	5

**Why or why not?**

## **Observations**

The interviewees were given a list of PCC board members and asked how many they knew or recognized. Twenty percent of interviewees knew or recognized all the board members. Of the remaining respondents, 7 percent knew or recognized most, 20 percent knew or recognized some, 33 percent knew or recognized one or two board members, and 20 percent didn't recognize any.

Of those who knew or recognized board members, 40 percent said all the members they know are community leaders. Twenty percent said most or some of the board members are community leaders, 33 percent said none were viewed as community leaders and the remaining interviewee was unsure.

The same questions regarding recognition and leadership were asked in regard to the Easter Lake steering committee. Again, interviewees were provided a list of committee members for reference. When asked how many members of the committee were recognized by interviewees, 7 percent knew all the members, 20 percent knew most, 60 percent knew some and 13 percent knew one or two.



Again, interviewees were asked if the members of the Easter Lake steering committee that they knew were viewed as leaders in the community. Sixty percent responded that all the committee members they knew are viewed as leaders, seven percent said most are, 27 percent said some, and seven percent said only one or two.

The next question asked interviewees to consider if the members of the board and committee are capable of raising major gifts for a capital campaign. The most frequent answer was that some of them had that ability (47 percent), while many interviewees answered that they were unsure (33 percent). Two people said all of the committee and board members had this ability, and one said that none of them did. Multiple interviewees responded there seemed to be much more public sector representation than private sector, and one wondered what fundraising role public sector representatives would be able to play, due to their positions.

Another interviewee noted that they did not see any potential major donors on the list, saying, *“I don’t think there’s anyone capable of making a major gift. That’s the first thing I usually ask—how much are you giving?”*

When asked if PCC is viewed as a well-run organization, two-thirds of interviewees said that it was, while the rest were unsure. No one said PCC is not viewed as well run. Most respondents simply noted the lack of anything negative, and that people likely don’t have a strong opinion one way or the other.

Responses were exactly the same when interviewees were asked if PCC is viewed as a financially sound organization, with two-thirds responding yes, and the remaining unsure. Again, many people said they haven’t heard anything negative regarding PCC’s finances, and one interviewee cited his/her connection with the county, saying, *“The county is, so yes.”*

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

Next we judged the participants’ reception to the proposed plan.



**10. Did you have knowledge of this campaign prior to receiving the materials for this interview?**

Yes	4
No	11

**11. Do you feel the scope of the project is correct, do you feel it's too large, or do you feel more should be included?**

Correct	6
Too Large	3
More Needed	1
Don't Know	5

**12A. How receptive are you to the proposed project?**

Very Receptive	2
Receptive	7
Somewhat Receptive	3
Somewhat with Exceptions*	1
Not Receptive	2
Not Sure	0

**12B. \*What are the exceptions?**

**12C. Would you consider using the lodge for a business meeting or personal outing? (Some answered yes to business and personal)**

Business Outing	12
Personal Outing	3
No	2

**12D. How supportive do you think the community will be?**

Very Supportive	0
Supportive	7
Somewhat Supportive	6
Not Supportive	0
Not Sure	2

**Why?**



## Observations

About one quarter of interview participants knew about the proposed lodge project before being invited to interview for this study, while the remaining three quarters were learning about it for the first time, or had very limited information.

Answers were fairly evenly split when asked about the scope of the proposed project. Forty percent felt the scope is correct, while 20 percent thought it is too large, and 7 percent saying more is needed. One-third of participants said they were unsure in response to this question. A few interviewees questioned the demand for a space like the lodge, with one saying, *“What market are they going after? There’s a lot of competition from hotels and convention centers.”* Others, although thinking the project looked nice, wondered about funding, saying, *“If the money can be raised, yes. What they want is nice, but can they get the money?”*

Most interviewees were receptive (47 percent) or very receptive (13 percent) to the proposed project. Twenty percent said they were somewhat receptive, and 13 percent said they were not receptive. One person said he/she was somewhat receptive with an exception, noting, *“There needs to be something there, but this scope is too much.”*

Again, interviewee’s reservations were based on the projected demand for this type of event space. One said, *“Lukewarm without understanding the demand.”* Another noted, *“Where’s the research saying this is filling a need?”* One participant noted the perception of the county being well-funded, making a difficult case in a crowded field of campaigns. They said, *“I’m not really interested. The county has a reputation of being well-run and funded. If there is a need, they can pay for it themselves.”*

Interview participants were asked if they would consider using the lodge for a business meeting or personal use. Only two said they would not consider using the lodge, noting transportation and no hotel rooms. Of the two options, most were more likely to consider the lodge for a business meeting, which isn’t surprising considering the audience being asked.

When asked how supportive the community would be of the proposed project, 87 percent said either supportive or somewhat supportive, with the remaining



13 percent unsure. Five interviewees mentioned that the surrounding neighborhood should be supportive, but it may be harder to convince those that don't live near Easter Lake.

## Section 4. Giving Capacity

The next questions were asked to determine if there is the necessary giving potential to conduct a \$7 million campaign and to assist in determining the level of support in the area.

### 13A. Do you think the \$7 million goal is realistic and attainable over a five-year pledge period?

Yes	6
No	4
Don't Know	5

### 13B. If YES, how would you rate the difficulty of raising the money\*?

Rating	Count
1 (easiest)	
2	
3	
4	
5	1
6	2
7	1
8	1
9	
10 (most difficult)	

\*Not all interviewees responded with a specific number

### 13C. If NO or DON'T KNOW, how much do you think is realistic?

### 14. Are there any existing conditions or other fundraising campaigns in the area that would affect PCC's campaign success? If yes, what?



Yes	11
No	3
Don't Know	1

**15. After reviewing the scale of giving required to raise \$7 million, do you feel there are individuals, foundations and companies who have the ability to make these kinds of gifts over a five-year period?**

Yes	12
Maybe	0
No	1
Don't Know	2

**16A. Who could be the individuals or companies most likely to make the top three to five gifts?**

Interviewees suggested 21 names. One was mentioned three times, one twice and the remainder mentioned once.

**16B. Who should we make sure we visit with about this project?**

Interviewees suggested and additional five names of people or organizations.

**17. At what level do you see your gift? And/or your company's gift?**

Answers varied from zero to \$250,000. **Self-reported giving totaled between \$347,00 and \$433,000** as a number of people or organizations indicated a possible range for their gifts.

**18A. Would you endorse this campaign?**

Yes	9
Maybe	4
No	0
Don't know	2

**18B. Who else must endorse the plan for the campaign to be successful?**



## Observations

Six out of 15 interviewees, or 40 percent, believed the goal of \$7 million was realistic and attainable over a five-year pledge period. Twenty-seven percent said the goal is not attainable and one-third were unsure.

Those who think the \$7 million is possible said that on a scale of one to 10, with one being very easy and 10 being very difficult, the difficulty of raising the money would be on average a 6.4.

Of the respondents who indicated they didn't know if the \$7 million goal was realistic and attainable, more realistic goals suggested ranged from \$1 million to \$4 million. One person suggested, *"I would do \$7 million from the county, one from private sources."*

When asked if there would be other campaigns happening in the area that could potentially affect this campaign's success, just under three-quarters of people said there were, while 20 percent said no and 7 percent said they were unsure. Seven other campaigns were specifically mentioned, with Water Works Park and the Des Moines River project mentioned multiple times.

After being shown the scale of giving required to raise \$7 million (appendix C), 12 interviewees, or 80 percent, felt there are individuals and companies with the ability to make these kinds of gifts. One interviewee said these gifts are not available and two were unsure. Many interviewees acknowledged that it would be a stretch, but there are people who have made those types of gifts in the area.

When asked to identify the people or businesses who could make the top three to five gifts, 21 specific possibilities were identified. One of these was mentioned three times, and another was mentioned twice. Another five names were shared as people or organizations with whom the project should be discussed.

Five interviewees said their gifts could fall in the leadership levels (appendix C) between \$15,000 and \$250,000. Three respondents indicated their gifts could fall within the major category of \$1,000 to \$14,999. Seven indicated that they were not likely to contribute or only contribute a nominal amount.



Sixty percent of interviewees said they would be willing to endorse this campaign. No one said they would not be willing to endorse, but the remaining interview participants indicated they were unsure or might endorse the campaign. Many of these “maybes” said they would consider an endorsement after the final plan is in place.

When asked who else must endorse this campaign, interviewees suggested 14 other people/organizations. The most commonly suggested group was the Des Moines Partnership (4) and County Supervisors (4), followed by the City Council (3).

## **Section 5. Leadership**

The following questions were asked about the availability of campaign leaders and volunteers.

### **19. Who do you believe would be the top three people to lead this campaign?**

There were 10 people cited as to who would be the best and most effective campaign leaders. Of the 10, two were mentioned more than once.

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

Participants named three additional individuals or organizations who must be involved.

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

Yes	6
Maybe	3
No	6
Don't Know	0

#### **Why or why not?**



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

Yes	1
Maybe	0
No	13
Don't Know	1

**Why or why not?**

**21C. Would you consider making any campaign calls if accompanied by a board member or a member of the PCC staff?**

Yes	6
Maybe	1
No	8
Don't Know	0

**Why or why not?**

## **Observations**

When asked who would make a good leader for this campaign, 10 individuals were mentioned. Of these, two were mentioned twice. Many people offered more general characteristics of an ideal leader. Three people mentioned someone from the neighborhood, two people suggested a mix of public and private sector leaders, and one suggested someone who could make a major gift.

Regarding volunteering in some capacity for a campaign, one interviewee would serve in a leadership capacity. Six would help make campaign calls and one said they might. Six would serve on a prospect evaluation committee and three said they might. To be successful, PCC must be able to recruit dedicated volunteer leaders to serve on the campaign committee and take leadership roles. These people need to be educated and cultivated to get on board.

**Recruiting fundraising volunteers will be one of your greatest challenges.**





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# **BOARD ASSESSMENT**





# Board Assessment

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A pre-campaign assessment and survey was conducted in conjunction with the feasibility study. The purpose was to measure the level of support from the PCC board of directors, feasibility study committee and advisory committee members. One board member participated in a face-to-face interview and two completed the online survey. In addition, the survey was sent to PCC Advisory Council members and those who participated in the feasibility study committee. In total, three out of five board members participated (60 percent) and seven out of 36 committee members participated (19 percent). AMPERAGE typically sees response rates in the 65 to 70 percent range.

## Section 1. Campaign Readiness

	<b>Please rank your perceptions of PCC's readiness for a capital campaign using a scale of 1-5 (5 = strongly agree, 1 = strongly disagree).</b>	<b>Polk County Conservation Board</b>	<b>Feasibility Study Committee, PCC Advisory Committee</b>	<b>Weighted Average</b>
A.	We have a strong and positive image and reputation, and our record of service to the region is above reproach.	4.00	4.43	4.33
B.	We have a solid history of fundraising success.	3.50	3.86	3.78



C.	Our constituency supports us in an exemplary manner.	3.50	4.14	4.00
D.	Our constituency understands and supports the cause.	3.00	4.14	3.89
E.	The \$7 million we seek in private funds is available in our region.	2.50	3.43	3.22
F.	Our constituency has responded favorably in the past to campaigns similar in size and scope.	2.50	4.14	3.78
G.	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.	3.00	3.50	3.39



H.	In addition to this inner circle, we have available to us a substantial body of additional volunteers who are willing and able to work actively in support of the campaign.	3.00	3.57	3.44
I.	A comprehensive process of long-term planning has taken place, involving the board members and staff, and the capital need is a logical outgrowth of that process.	2.50	4.00	3.67
J.	Credible documentation of the capital need has been prepared that explains the details of the project and describes history and needs, but concentrates on positive outcomes and people served.	3.00	3.71	3.56



L.	A process is in place to address significant obstacles that may be uncovered prior to or during our campaign.	2.00	3.71	3.56
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.	2.50	3.43	3.22



	Respondents	2/4*	7/36	9/40
	Percent Responding	50%	19%	23%

\*One board member was interviewed, so not counted in this tabulation.

## Section 2. Profile and Involvement

Committee and board members who responded to the survey have been associated with the organization for time periods ranging from one year to 30 years. When asked why they were involved, respondents frequently cited a love for the outdoors and wanting to conserve resources for future generations.

What benefits does PCC and Easter Lake provide to the area? Six out of the nine respondents specifically cited recreation opportunities, and three more pointed to the importance of the location on the southeast side. For example, one said, *“Recreation. Gathering point of SE Des Moines.”*

## Section 3. Mission and Administration

When asked about the mission of PCC, two survey respondents cited the mission statement verbatim. In addition, issues related to conservation/preservation were mentioned five times, education mentioned four times, recreation mentioned three times and expanding and promoting parks was mentioned twice.

Answers were very similar when asked what the no. 1 priority of PCC should be. Answers focused on providing and protecting a place where people can enjoy nature. One said, *“Providing a system of parks where people can enjoy nature and learn about it.”*



Seven people, including both board members, responded yes when asked if the board was working well together and was effective in setting policy and direction. The other two said they were unsure.

All survey respondents felt the PCC is viewed as a well-run organization and financially sound. Echoing comments from the interviews, one person did say that not a lot of people know about all the things PCC does. Another referred to the passage of the bond when asked about finances.

Two people indicated that the board and/or committees have the fundraising capacity and affluence/influence to conduct a major campaign. One board member said they do not, and the rest were unsure.

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

Five of the survey participants said they approve of the proposed campaign and its funding objectives. The other four, including one board member, were unsure. One said, *“I think that there might be some difficulty considering the scope and publicity for the Nature Center and a few of the other projects that might be a priority in the community.”* Full support of the board is an important aspect of the campaign, and it will be important to address any hesitations before a final plan is approved.

Four respondents thought people in the area would donate the \$7 million and five didn't know. Those that didn't know were concerned about competing campaigns, and one suggested a goal closer to \$3 million.

When asked how they would rate the difficulty of raising the money, with one being very easy and 10 being very difficult, the average of the seven respondents was 6.7.

Six out of nine respondents said they would endorse the campaign, two said they might and one said they would not. The respondent that said he/she would not, and the two that were unsure, had concerns about viability and public interest.

A number of campaign obstacles were listed by survey respondents. Two mentioned this campaign coming fairly soon on the heels of the Jester Park campaign, and another suggested more general competition of other campaigns. Another thought there may be questions on how the money in the approved referendum was spent and yet another suggested that the vision for



the project is inadequate. Water Works and Riverview were listed as potential competing projects.

## **Section 5. Giving Potential and Leadership**

To set an example to the public, board giving often totals 10 to 15 percent of the campaign objective (\$700,000 to \$1,050,000 for a \$7 million campaign). It should be noted, however, that this level of giving is a national standard which incorporates larger boards (averaging 18 directors) and many colleges and universities. Four survey respondents said that it was not possible to raise this amount from the board and committee, four were unsure and one said this amount could be raised from leadership.

Including data from the face-to-face board interviews, the members of the board indicated their gifts over a five-year period would collectively not exceed \$6,000. Including feasibility study committee members, that maximum amount rose to \$17,500. Keep in mind this is the maximum end of ranges suggested by interviewees.

A word of caution: **Funds cannot be raised at either the board level or the community level by simple mathematics.** One cannot take the goal and divide it by the number on the board or the community at large. Everyone has a different giving potential. No one can be told what to give or how. Giving is personal and must be respected and appreciated by all. Critical to a campaign's success is the financial commitment of **every board member**. Likewise, it will also be important for PCC staff to show their support and have a high level of participation in giving to the campaign.

Working on the campaign is no less important than giving to the campaign. It is extremely important to have board members involved in one way or another. When asked about willingness to serve as a leader in the campaign, one board/committee member replied yes, five said no and three said they didn't know. One respondent said they would serve on a short-term committee to review names of donors, four said maybe and four said no. Two said they would make campaign calls, four said they might and three declined to serve in this role.

Board members don't all have to lead or serve on a major campaign committee, but their abilities to do tasks that are appropriate for their skills and talents should not be overlooked.



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The importance of the involvement and commitment of board members in a campaign cannot be overstated. It is the **single most important criterion** of a campaign's success. Board members set the example. Their involvement will send a message to potential supporters. No one is going to care as much and no one is going to have to work any harder or longer. The training, organization and dedication of the board will see a campaign through to a successful completion.



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# **ORGANIZATIONAL READINESS**



# **Organizational Readiness**

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To gain a sense of Polk County Conservation’s readiness for a fundraising campaign, we conducted an organizational assessment of the development function, programs and attributes.

## **Section 1. Staff and Involvement**

Rich Leopold, director, has been with Polk County Conservation for four years, plus an additional year serving as deputy/interim director. It is estimated that 10 percent of Rich’s time is spent on personal solicitation of gifts and an additional 25 percent on relationship building/public speaking.

Polk County Conservation also works closely with a nonprofit partner, The Great Outdoors Foundation, which helps facilitate fundraising activities for PCC. PCC has plans to continue growing this partnership, including jointly funding an executive director position that would aid in grant writing and other fundraising activities. PCC also employs a community relations coordinator, Kami Rankin.

These key employees of PCC belong to Iowa State Association of Counties, the Iowa Association of Conservation Boards and the Des Moines Rotary Club.

## **Section 2. Development Activities and Collateral**

Polk County Conservation received approximately \$500,000 in contributions in 2017. It is estimated that \$5,000 of that amount was from annual contributions, \$5,000 was from events and the remaining \$490,000 was related to the Jester Park Nature Center campaign.

It should be noted that Polk County Conservation has completed the campaign for the Jester Park Nature Center within the last two years, although pledge payments are still being made. Prior to Jester Park, Des Moines was the only urban center in Iowa without a nature center. It features many environmental education opportunities and strong partnerships with area schools, event space and recreational opportunities. Approximately \$2.5 million was raised privately over the past four years in support of this project.



As noted above, PCC is in the process of hiring an executive director to focus on fundraising in association with the Great Outdoors Foundation. The Great Outdoors Foundation coordinated fundraising activities for the Jester Park Nature Center campaign. Specific case statements have been assembled on a project basis, but there is no general PCC fundraising brochure. New initiatives, like marketing materials and direct mail programs, will fall under the duties of the new executive director, but have not been developed yet.

PCC does have recently updated gift acceptance policies in place, but no donor database at this time.

Polk County Conservation has a few different webpages. One is more of a blog-style site with news updates at [leadingyououtdoors.blogspot.com/](http://leadingyououtdoors.blogspot.com/). There is also a subsite on the Polk County site that includes more information on staff, facilities, etc. at [www.polkcountyiowa.gov/conservation/](http://www.polkcountyiowa.gov/conservation/). These sites do not facilitate any type of online giving. The Great Outdoors Foundation site, [www.greatoutdoorsfoundation.org](http://www.greatoutdoorsfoundation.org), does offer online giving opportunities for PCC projects, such as Easter Lake and the Jester Park Nature Center.

Polk County Conservation also hosts a number of events each year, although these are not primarily fundraising events. These include educational opportunities, Glow Wild, live music and bonfires. An external newsletter is produced by PCC three times per year, and there is no internal employee newsletter.

A strategic plan was completed in 2014, aimed at addressing the following five years. As such, that plan is currently under review. This campaign is not an extension of that plan.

### **Section 3. Volunteers**

PCC has a large group of volunteers, estimated at about 130 people. This group primarily helps in restoration and maintenance projects. They also host a number of volunteer days focusing on similar projects like clearing debris and trash from trails and waterways.



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# **SPOT ANALYSIS**





# SPOT Analysis

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1. **Strengths** of PCC/Easter Lake and the Campaign
  - PCC/Polk County bring credibility to project (versus solely a neighborhood association)
  - Easter Lake Steering Committee has good recognition and leadership, particularly from the public sector
  - Large number of people who already volunteer for PCC, and good response to volunteer opportunities for campaign
  - Neighborhood/area of potential donors around Easter Lake
  - Many are supportive of the project, at least to the point of endorsement
  - Viewed as positive for southeast side of Des Moines
  
2. **Problems** PCC/Easter Lake and the Campaign Face
  - Fairly large percentage of interviewees who suggested they would not financially support this project, or their gifts would be negligible
  - Difficulty identifying and securing interviewees
  - Questions around the project:
    - Is there demand for another event venue? Is it sustainable?
    - What are the ongoing costs and how will they be funded?
    - Who will manage the venue?
    - Is it only accessible to event guests? Who benefits from this project?
    - How will this space compete with other event space options in Des Moines?
  - Campaign would likely start while pledge payments are still being made for Jester Park Nature Center
  - No current staff member dedicated to fundraising
  - Lack of coordinated donor records, giving history, notes on interactions, etc.
  - Not seen as balanced public-private partnership (proposed 88 percent private funds, 12 percent public)
  - Lack of strong support from board and committees



- 3. Opportunities** for PCC/Easter Lake and the Campaign
  - Ability to grow relationship with the Great Outdoors Foundation in order to enhance fundraising capabilities
  - Parks/conservation seen as increasingly important, especially in terms of quality of life, employee attraction/retention
  - Des Moines has giving capacity to support a campaign of this size
  - PCC can, with more research, show economic impact and return on investment projected for this project
  
- 4. Threats** PCC/Easter lake and the Campaign Face
  - Other campaigns happening in Des Moines, particularly Water Works and the Des Moines River project
  - Numerous competitors in the event hosting business
    - Again, is project financially sustainable?
    - Easter Lake Lodge would face issues of not offering lodging and having to transport people for most corporate events
  - Questions surrounding tax and bond money (i.e. why wouldn't that money pay for this project)



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# **FINDINGS AND RECOMMENDATIONS**





## Findings & Recommendations

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The study conducted on behalf of Polk County Conservation indicated a number of obstacles that would make a campaign for the Easter Lake Lodge especially difficult. The following summarizes our impressions of your fundraising capability:

- Forty percent of all interviewees believed the tested goal of \$7 million could be achieved over a five-year pledge period. In past studies conducted by AMPERAGE which ultimately raised their tested goal, an average of 64 percent responded that the proposed goal is attainable.
- Twenty-one different names of individuals or businesses were mentioned as having the capacity to give at the top leadership gift levels. This is less than the average 40 names we usually hear in response to this question. This can likely be attributed to a lower number of interviews.
- Forty-seven percent of the interviewees believed people in the area would be supportive of the proposed project, but no one suggested the community would be very supportive. Again, in studies that ultimately reached their tested goal, these responses average 12 percent (very supportive) and 36 percent (supportive).
- Sixty percent of interviewees would endorse the campaign and an additional 27 percent might endorse it. Average endorsement rates in AMPERAGE studies that raise the amount tested in the feasibility study are 74 percent who would and 9 percent who might.
- The average self-reported giving rate of AMPERAGE campaigns that met their goal is 24 to 33 percent of that proposed goal, and the average self-reported giving rate of campaigns that had to reduce their goal by at least 40 percent is 11 to 15 percent. We further examined the self-reported giving for the Easter Lake Lodge campaign from two perspectives:
  - Total self-reported giving from the interviewees ranged between **\$347,000 and \$433,000**. This represents 4.96 to 6.19 percent of the \$7 million campaign goal.



- By adding **\$17,500** to this amount based on self-rated figures from the board and committee respondents' self-assessments, this range increases to 6.43 percent of the \$7 million goal.
- The Center on Philanthropy at Indiana University conservatively recommends a capital campaign goal no higher than six times what an organization raises in its annual fund. Based on six times your organization's total of approximately \$10,000 raised in the last year, not counting Jester Park Nature Center pledges, this total would be \$60,000. Including Jester Park pledges, the total would equal \$3 million. It should again be noted that outside of the Jester Park campaign, PCC only engaged in fundraising on a very limited basis.
- Forty percent of interviewees said that the scope of the project is correct and 20 percent said it is too large. Campaigns that reach their tested goal see average responses of 66 percent for correct and 7 percent for too large.
- When asked if their personal and/or business gift would fall into the leadership category (\$15,000-\$250,000+), five interviewees indicated their gift would. Three indicated their gift would fall under \$1,000, and the rest said they were not likely to contribute, or only a small amount. **The success of securing large gifts—and any gifts to the campaign—will depend on how well the case is articulated and who is involved.**
- However the final project ends up, it is important that the board fully supports it. There still seem to be questions and concerns about the project amongst board members, which must be resolved.
- Six interviewees (40 percent) stated they would assist or might serve on a prospect review committee, and 40 percent said they would be willing to make campaign calls. These exceed averages of 16 and 20 percent for those questions, respectively.

## **Recommendations**

The study benefited Polk County Conservation in a variety of ways. Although there are a number of obstacles facing this fundraising project, it is better to identify them in this early stage. The insights provided in this report will help to advance the conversation and planning of this project, knowing what is achievable from private fundraising.



As previously stated, the feasibility study's purpose was to determine your ability to raise campaign funds for your project. **After analysis and thoughtful consideration of the information gathered from the interviews and the board and committee surveys, we recommend that you not move forward with a fundraising campaign at this time.**

We present the following recommendations as strategies for moving forward with this project.

**1. Continue to work with the Great Outdoors Foundation (or other partners) to solidify and hire someone who will focus on fundraising for PCC.**

Most of those interviewed and surveyed felt that PCC does a good job with its primary mission of protection, education and conservation. Doing so takes a lot of time and effort. Fundraising also requires a lot of time and effort. Trying to do both well means one is probably going to be shortchanged. This is why it's important to have someone who is solely focused on fundraising.

Fundraising is about building relationships, which happens over time, not overnight. Having someone that manages those relationships will dramatically increase the chance of success for future fundraising efforts. When future fundraising opportunities are presented, a successful full-time fundraiser should be able to fairly quickly compile a list of 20 or so potential major gift donors, and be able to reach out to them.

Leadership gift support is critical for a campaign. The 80/20 rule applies here, to an even greater extreme. AFP and The Fundraising Effectiveness Project recently released a study that suggested 89 percent of gifts come from the top 14 percent of donors. It is important that you have someone who is able to cultivate and manage relationships with these top donors.

**2. Build a conservation annual fund and pool of supporters.**

Although gifts at the leadership level are lacking for this campaign, people are generally supportive of the work PCC does. Many of those we discussed this project with understand the importance of conservation and the role it plays in providing a high quality of life in the area. It's important for attracting and retaining employees and residents, and the Des Moines area is projected to continue growing, providing an even



greater demand for parks and recreational areas. This suggests that although there may not be leadership gift support for this project, people would still support the work PCC does with smaller gifts on an annual basis. These gifts could be solicited through direct mail and email appeals, online and social media giving and events. These materials could highlight important initiatives, like Jester Park or Easter Lake, from year to year. Opportunities like naming plates on the Ackelson Bridge could also be highlighted.

Building a pool of donors will take investment on the part of PCC (more detail in the next recommendation). But the potential is available—just 1,000 donors (that’s less than 0.2 percent of the greater Des Moines population) giving an average of \$100 yields \$100,000 per year.

Building a base of annual donors has the benefit of helping to identify those that believe in your mission and have the potential to make a much larger gift. Des Moines is an area with great wealth, and there is the group of “usual suspects” who help in significant ways with many projects in the area. These people and businesses are a great benefit to our community, but the competition for their time and money is great. Building your annual fund allows you to identify those that still may have the capacity to make major gifts, but fly a little lower under the radar. This will put you in a much stronger position when approaching the next campaign opportunity.

### **3. Develop a fundraising plan and infrastructure.**

So how do you go about building the annual fund? Once a full-time person is hired, they will need to put into place the tools they need to be successful. While this plan will be at the direction of whoever is hired, here are a few suggestions:

First, gather support from those closest to PCC. This would include boards, committees, staff and volunteers. These are people that all already believe in the mission of PCC. Everyone has different capacities to give, so the total dollar amount isn’t *as* important, but rather participation rates, especially for any boards. Many organizations have development subcommittees that can help guide strategy, open doors to potential donors and advocate for the board to make their personal gifts.



Second, invest in a donor database system. You may be surprised how much information is collected on donors and potential donors: Demographics; contact info; giving history; visit notes, etc. Trying to track all this in Excel will get very messy, very quickly. There are a number of different options out there, many that allow you to start at a more basic model and upgrade as needs change. PCC should evaluate and invest in a database from the get-go.

Finally, PCC will need to develop marketing collateral pieces that illustrate the mission and impact of the organization. The content for these pieces can be utilized across a number of mediums. At minimum, we suggest utilizing:

- A general brochure or booklet that explains organizational mission and impact that could be left behind after personal visits.
- A section on your website that allows for online giving and provides information on what gifts are used for (many databases will have ways to facilitate this).
- Stewardship materials, including thank you letters that acknowledge gifts for tax purposes.
- Direct mail and email appeals. Although PCC should schedule at least a few appeals throughout the year, keep in mind that the majority of annual giving occurs at the end of the year.

These are a few basic building blocks to get started. As the PCC fundraising program grows, more can and should be added. Planned giving can also be a productive source of fundraising income, and a good way to grow your endowment. Building your annual fund will help you identify potential planned gift donors.

#### **4. Revise the Easter Lake Lodge project as needed (dependent on financing options).**

We do think it would be possible to raise funds, particularly from the corporate community and tied to naming opportunities (addressed in next recommendation). We believe that with a full-time fundraiser in place, \$1 million could be raised for this project, assuming a \$250,000+ naming gift. Due to the lukewarm fundraising response, we would recommend doing this as an ongoing fundraising effort, tied into the annual campaign



and focused on select corporate grants, versus a traditional capital campaign.

We understand that reducing the fundraising potential from \$7 million to \$1 million may affect project plans and scope, depending on other financing options. As multiple interviewees pointed out, at least half the money should come from public sources, with one even suggesting a complete flip, \$1 million from private fundraising and \$7 million from PCC.

While revisiting the project, there are some things that could be considered to make this a more attractive fundraising opportunity. First, anything that could be added to increase public access would be helpful. As it stands, the only way to utilize the lodge would be to host or be invited to an event there. There would be no draw for walkers/runners, bikers, boaters, etc. It is essentially a private enterprise being run on public land. This makes it an especially difficult fundraising ask for individuals—why should I give if I don't even think I would be in the lodge more than once or twice?

Second, anything that can be added in terms of programming or recreational opportunities would also increase the chances of fundraising success. This would open up more corporate opportunities, as many have specific areas of giving, such as education or wellness. Jester Park Nature Center is a prime example of this. The educational opportunities and connection with area students were heavily emphasized. Generally, a gift to the Jester Park Nature Center helps children learn about nature. As the project currently stands, the same cannot be said about the Easter Lake Lodge.

Once the final project scope is determined, it is vital that it has the full support of key stakeholders, including the board of supervisors and conservation board.

##### **5. Build a business plan for the lodge.**

The interview responses indicated businesses have a greater likelihood of donating to this project as proposed. They do, however, have a number of questions to be answered.

They want to know what the demand will be. How many people will be in and out of the facility to potentially see their named building, room, etc.?



There are a lot of event spaces in Des Moines, and the Easter Lake Lodge would face serious competition. Although it would have the unique benefit of being in a particularly scenic location, other options may be closer to preferred lodging. Many large corporations now also have their own event space. How would the Easter Lake Lodge overcome these obstacles?

Many were also concerned with upkeep and maintenance costs. If a business is going to make a significant gift and put their name on something, they want to know it will be taken care of and will not become run down. Financial projections would be beneficial. Finally, the question lingers that if there is demand for this space and it would provide a positive return on investment, why couldn't it be financed through loans or bonds?

#### **6. Create naming opportunities.**

As noted previously, most of the interest in giving to this project, particularly at the leadership level, came from businesses. One common misconception is that corporations make a lot of money, and therefore can (or should) be giving it away. The fact is that only about 5 percent of giving in the U.S. each year comes from corporations, making it very difficult to base a campaign primarily on corporate giving.

That being said, results of this study showed that corporate donors have a greater likelihood of contributing large gifts to this project. While some individuals may wish to give and be recognized with a naming opportunity, others may wish to simply give and not receive public recognition. Corporations, on the other hand, are much more likely to want to be recognized in this way, making naming opportunities especially important to this campaign.

The largest naming opportunity for the Easter Lake Lodge would be naming the facility itself—"the Company X Lodge at Easter Lake." This opportunity will need to be priced in accordance with the final project costs. As a benchmark, building naming opportunities are at least 25 percent of the total project cost, if not closer to half. If there is a lack of demand for the naming opportunity at that cost, PCC could also offer limited term naming opportunities, spanning 10 to 20 years.

Once the overall building naming opportunity is established, naming opportunities for other components of the project can be established. It's



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important to note that naming opportunities should be based on visibility and prominence, not necessarily the cost of each component. For the proposed project, we would recommend the deck being the second highest naming opportunity, followed by the great rooms, then the reception hall. Again, we would recommend these naming opportunities be rolled into an ongoing fundraising effort for PCC, versus a traditional campaign.



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**VERBATIM**



# Verbatim

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## Section 1. Image

- 1. Are you familiar with Polk County Conservation, the people it serves, its programs and its services?**
- 2. How do you know about Polk County Conservation?**
  - *We've held funds for them and made a leadership grant for Jester Park.*
  - *I used to work for a nonprofit and one of our volunteers was involved with them.*
  - *Do they have a booth at the Fair?*
  - *I serve on the board.*
  - *Lived in Iowa. My wife is a science teacher and involved in some of the programming.*
  - *I used to work there, right out of high school.*
  - *We've worked on a number of projects with them.*
  - *We've worked with them on some quality of life initiatives, capital crossroads.*
  - *County supervisor.*
  - *I've been involved with a number of projects.*
  - *I've lived in Des Moines my whole life.*
  - *County supervisor.*
  - *I've worked with them, produced some videos.*
- 3. What are Polk County Conservation's most outstanding benefits to the area?**
  - *They bring credibility to this project, instead of it just being run by a neighborhood group.*
  - *Upkeep of public lands like parks and trails.*
  - *Restoration and preservation of land.*
  - *Watershed, work with DNR.*
  - *Green space, recreation, watershed/quality engagements.*
  - *Parks, land, recreational opportunities, educational programming, stewards.*

- *Family recreation opportunities for sure.*
- *Great organization for conservation. Provides parks, open space. Serves a lot of unincorporated areas. Helps with quality of life, economic development.*
- *Strategic capital project investments, good programming.*
- *Outdoor activity for Polk County residents. Watershed and water quality initiatives.*
- *Environmental education is very strong. People don't realize the infrastructure that goes into conservation. They provide a high level of service.*
- *Parks. They're strong in conservation. They do a great job. Lots of water projects.*
- *Conserving and overlooking things for the public. Trails, soil, water conservation.*

**4A. How would you describe Polk County Conservation's image in the area?**

- *It's a non-image.*
- *Jester Park heightened the awareness.*
- *I don't think most people really know about it.*
- *I don't really think they have an image.*
- *Not what it should be, but it's hard to let people know everything they do. It's not bad.*
- *I don't think they're very publicly known. People don't understand what they do.*

**4B. If you were the director of Polk County Conservation, what would you do, if anything, to improve the image of the organization in the area?**

- *It's hard. There's a lot of good causes in our community.*
- *I remember something happening with Jester Park, it may have been due to a transition in leadership. I seem to recall they had to go back to some donors and ask for more.*
- *More visibility is always good.*
- *Focus on events, displays, that complement their work.*
- *More funding for more people and resources.*
- *Tell their story, explain the value they bring to the community.*
- *Could probably be more proactive in talking about their work, facilities.*
- *Can always be better at storytelling, conveying success.*

- *Educating the community more about return on investment, how it helps real estate, talent retention, other economic factors.*
- *They don't really need an image. The parks and golf courses do. They should be in the background.*
- *I suppose let people know what they are doing through advertising.*
- *Get the word out more. I realize funding is hard. They are a little understaffed right now, they could have more of a presence.*

**5A. Are you familiar with Easter Lake?**

**5B. How often do you visit Easter Lake?**

**5C. Are there other parks and/or recreational areas you utilize?**

- *I'm probably not their target, my utilization is lower. I do believe strongly that parks are a value for the community. It's a quality of life issue. Need public investment to attract and retain employees, better our communities.*
- *Gray's Lake, Waterworks, Lake Panorama, Saylorville.*
- *Gray's Lake, Saylorville, Raccoon River.*
- *Saylorville, Sun Valley, Clark County.*
- *Yellow Banks, Fort Des Moines, Jester Park.*
- *Classic autos are more my thing. But occasionally Gray's Lake, Iowa Great Lakes, Des Moines Riverfront, Raccoon River.*
- *Bike trails, Jester Park Nature Center.*
- *Lake Greenwood, Ashworth Park.*
- *City parks.*
- *Raccoon River, Waterworks, bike trails.*
- *Jester Park.*
- *I'm all over the state fishing walleye. This could be a premier location.*

**Section 2. Board and Administration**

**6A. Do you know or recognize the members of the Polk County Conservation Board?**

**6B. Are they recognized as leaders in the community?**

**7A. Do you know or recognize the members of the Easter Lake steering committee?**

**7B. Are they recognized as leaders in the community?**

**8. Are the members of the board and steering committee capable of raising major gifts for a capital campaign?**

- *I recognize the county and parks and rec people. I don't know if they would be able to fundraise with their positions.*
- *Some have some good business connections, have done this type of thing before.*
- *There's not a lot of corporate representation.*
- *Not a lot of big private sector people, lots of public.*
- *I don't think there's anyone capable of making a major gift. That's the first thing I usually ask—how much are you giving?*

**9A. Is Polk County Conservation viewed as a well-run organization?**

**Why or why not?**

- *I don't think people have an opinion one way or the other.*
- *I haven't heard otherwise.*
- *I don't know them well. They're not a very public organization.*
- *I haven't heard anything negative.*
- *I would guess so.*
- *I don't hear anything negative.*
- *No view one way or the other.*
- *There's been some cuts, hurting them and conservation around the state overall.*

**9B. Is Polk County Conservation viewed as a financially sound organization?**

**Why or why not?**

- *I haven't heard otherwise.*
- *They've been around for awhile.*
- *People don't really know.*
- *There's some distrust of government. Always 20-30 percent that will be skeptical.*
- *The county is, so yes.*

- *I wouldn't say they are above average with recent cuts. They do well with what they have.*

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

**10. Did you have knowledge of this campaign prior to receiving the materials for this interview?**

**11. Do you feel the scope of the project is correct, do you feel it's too large, or do you feel more should be included?**

- *I would look at the Windsor Heights Community Center, compare it to that. How much did that cost and what was raised?*
- *It looks impressive.*
- *There's lots of different venues. If this were where I lived, I would ask what the tax impact is? For business, it can be a benefit to have an option that also includes lodging.*
- *It's a big number.*
- *What market are they going after? There's lots of competition from convention centers and hotels.*
- *It appears to be adequate. I don't have the knowledge, it depends on the demand.*
- *It's a good project from what I know. That region could use a project.*
- *It's a significant amount of money to raise. It would depend on what else is going on.*
- *Compare it to Jester Park Nature Center. Three million was very tough there, and that was the only resource of its kind in Polk County. It had broader appeal. It's utilized by kids. Is this sustainable and what is the community impact?*
- *I don't know the demand.*
- *If the money can be raised, yes. What they want is nice, but can they get the money?*
- *The seating capacity is a little small for the clientele they are going after. They would likely need more than just a movable wall if there are two meetings happening at once.*

**12A. How receptive are you to the proposed project?**

- *I don't think this would be competitive for a leadership grant.*

- *We have a customer base in the Easter Lake area. We've worked with contractors, realtors.*
- *Lukewarm without understanding the demand.*
- *Outdoors people like fishing, etc. Will they use this? Where's the research that says this is filling a need?*
- *Don't discount other options for the project. There's some strong feelings about the location of the lodge. With some of the infrastructure in place, a different location would lower the cost. I understand some of the neighbors are opposed to this.*
- *I'm not really interested. The county has a reputation of being well run and funded. If there is a need, they can pay for it themselves. The city, in contrast, is seen as broke. County has money and stream of cash from Prairie Meadows. There's just so many campaigns and needs out there.*
- *Easter Lake is like a quiet village now. This would bring a lot of new people through. How will staffing, like rangers, change? I'm for it, but a bit apprehensive.*

**12B. \*What are the exceptions?**

- *There needs to be something there, but this scope is too much.*

**12C. Would you consider using the lodge, either for a business meeting or personal outing?**

- *If we are bringing people in, lodging is a must.*
- *I would have questions about transportation.*

**12D. How supportive do you think the community will be?**

**Why?**

- *People on the South East side should be supportive, but I don't think you can raise it from them alone. Companies who have employees there may pitch in.*
- *People in the area would probably support it. Otherwise it's kind of out of sight, out of mind. There's nothing drawing me there.*
- *Depends on if they have to pay for it.*
- *The location is a positive. I think it would be utilized.*
- *There's lots of good recreation projects happening. The demand will grow.*



- *Supportive if it can be paid for. There's a shortage of mid-sized facilities.*
- *I would hope they would support it.*
- *It's a government agency, and they have an incredible bonding capacity. That can make it harder to ask.*
- *You need to educate people. Why don't taxes just cover this?*
- *A lake in urban areas like this is pretty unique.*
- *The key is the Easter Lake community. Private money will come from there.*
- *People who live in that part of the county should be more supportive.*
- *If you're not living there, not supportive.*

## **Section 4. Giving Capacity**

### **13A. Do you think the \$7 million goal is realistic and attainable over a five-year pledge period?**

- *It will be very hard without a major gift.*
- *It's a stretch.*
- *It's a stretch. Something like Waterworks, everyone can use it. For this, you have to be invited.*
- *Need to show sustainability, have pro forma financial statements.*
- *It's an easier ask if it's a 50/50 split between public and private.*

### **13B. If YES, how would you rate the difficulty of raising the money?**

### **13C. If NO or DON'T KNOW, how much do you think is realistic? Amount \$\_\_\_\_\_**

- *You would need to secure half from gifts of \$500,000 and up.*
- *Half.*
- *\$4 million.*
- *\$2-3 million.*
- *I would do seven from the county, one from private.*

**14. Are there any existing conditions or other fundraising campaigns in the area that would affect this campaign success?**

**If yes, what?**

- *Lots. That's the great thing about our community. Look for people that have some connection to the area.*
- *Lots of event spaces are opening in the East Village.*
- *About 25 of them. The good projects rise to the top.*
- *Always so many.*
- *Always a lot, although I'm not sure there's direct competition.*
- *Need to go to new sources, have a targeted fundraising effort.*
- *Groups are still paying pledges for Jester Park.*
- *Yes, everywhere.*

**15. After reviewing the scale of giving required to raise \$7 million, do you feel there are individuals, foundations and companies with the ability to make these kinds of gifts over a five-year period?**

- *It would be a stretch. I don't know that this is compelling.*
- *Naming opportunity would be important. \$1 million is a stretch.*
- *With the ability? Yes.*

**16A. Who could be the individuals, foundations or companies most likely to make the top three to five gifts?**

- *Wealthy companies and families on SE side.*
- *Large corporations. It would depend on their priority areas for giving.*
- *Focus on residential and commercial development potential.*
- *\$50,000-\$100,000 are more plausible.*
- *Usual suspects.*
- *Big corporations.*
- *Big companies.*
- *There's a lot of wealth in the city. Retirees from the big companies.*

**16B. Who should we make sure we visit with about this project?**

- *People in the neighborhood.*

**17. We are certainly not seeking a gift in this interview. That is not our role. However, if Polk County Conservation were to conduct a**

**capital campaign, where would you see your gift knowing it could be made over five years?**

**And/or your company's gift (including in-kind)?**

- *We would look at what other companies are doing and benchmark from that. Need to tie value to how it benefits agents, policy holders, etc.*
- *They need more public money. Fifty percent should be bonded.*

## **Section 5. Leadership**

**18A. Would you endorse this campaign (i.e. would you say you're in favor of it if someone asked you)?**

**Why or why not?**

- *If they can make it happen, I would support it.*
- *Maybe once it's more finalized.*
- *Maybe further down the road.*
- *If I agree with the final project.*
- *If its filling a need and is funded.*
- *Falls into line with Capital Crossroads, quality of life initiatives.*
- *Publicly, yes. Privately, I think its too large.*
- *I'm neutral. Not against it.*

**18B. Who else must endorse the plan for the campaign to be successful?**

- *The Des Moines Partnership, back to the quality of life idea. Des Moines Parks and Rec; municipalities; nonprofits in the area.*
- *Business leaders.*
- *Southside business leaders.*
- *Corporate leaders.*
- *Corporate community.*
- *Significant business leader for corporate money.*

**19. Who do you believe would be the top three people to lead this campaign?**

- *Someone who can make a major gift.*
- *People with a strong connection to the neighborhood.*
- *Someone involved in parks.*
- *Someone from public sector and corporate leader.*
- *People from the committee. One public and one private.*
- *Someone from the area.*
- *Someone from south side.*

**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?**

**Why or why not?**

- *Too many other commitments right now.*

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

**Why or why not?**

- *Time commitment.*
- *I would probably be involved because of my position.*
- *As long as it doesn't eat up too much of my retirement time.*

**21C. Would you consider making any campaign calls if accompanied by a steering committee member or a member of the PCC staff?**

**Why or why not?**

- *I'm not not interested, you just need someone who will be more committed.*
- *I can't because of my position.*
- *If there are a few I could be helpful with, yes.*
- *I'm too involved with Hunger Free Polk County.*

## 22. Why did you agree to meet with us today?

- *I strongly believe in quality of life initiatives.*
- *They followed up the letter. It was a personal ask. We support the community.*
- *We have a number of customers in the area.*
- *Doug asked me.*
- *The concept is interesting. Is there a need? What is the market?*
- *I'm familiar with Polk County Conservation. My grandfather was on the original board.*
- *These projects are important for both the environment and economic growth, attracting younger workers.*
- *Looks like a good project. Good for the south side.*
- *It's an important project, I would like to see it get done. It would be a nice feather in the cap after the renovations.*
- *I've been involved with conservation projects and Polk County Conversation. It's important to make the right ask at the right time. Seven million is a big lift.*
- *I like Iowa, Polk County, Des Moines. I like to see projects move forward if economically feasible.*
- *I'm very familiar with Easter Lake and have been involved from day one.*
- *Stan called.*

## 23. Additional Comments:

- *Will this include any funds set aside for maintenance? People won't want to give to something that's falling apart in a few years.*
- *Define your users, determine who they are. They can help spread the word about the project.*
- *There's a lot of meeting facilities out there. Hy-Vee just invested in their own.*
- *It would be a good addition, its just a big number. If you get the right people behind it, it could go. Key is finding passionate people who can connect with the right people.*
- *There's lots of questions. This will generate a lot of wear and tear, how is that funded? How is technology kept up to date? Is alcohol allowed? Who is managing it?*
- *There's a lot of people out there asking for money.*
- *Need to answer how this serves the everyday user, like kids, families. Projects like Waterworks provide space for programming, but then*



*others, like the YMCA, come in and provide the actual programming. Without programming you're limiting grant and foundation opportunities.*

- *Gray's Lake is going through a master plan. There will be some big players involved with that.*
- *Will the upkeep fall on taxpayers?*
- *Is there a need? Has there been a study on that? There's a million places to do weddings, what makes this worth the investment?*



**AMPERAGE**

MARKETING & FUNDRAISING

MOVE THE NEEDLE

# APPENDIX





**AMPERAGE**

MARKETING & FUNDRAISING

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## **Appendix A**

# **Polk County Conservation Board of Directors**

Jill Altringer

Dianna Barrata

Jim Cataldo

Tom Levis

Lance Northway



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## **Easter Lake Steering Committee**

Stan Thompson

Jim Bollard

Barry Vosler

Tom Hockensmith

Sarah Boese

Ben Page

Joe Gatto

Jim Cataldo

Brenna Finnerty

Lisa Baker

Randy Bray

Sadie Trytten

Abbey Gilroy

Rich Leopold



**Appendix B**

**Easter Lake Lodge  
 Number of Gifts at Various Levels  
 Required to Reach the Campaign Goal of \$7,000,000**

		# Gifts In Range	# Gift Prospects	Gift Value	\$ Amount in Range	Cumulative Total
	<b>Leadership</b>	1	6	\$ 1,000,000	\$ 1,000,000	\$ 1,000,000
		2	6	\$ 500,000	\$ 1,000,000	\$ 2,000,000
		3	18	\$ 250,000	\$ 750,000	\$ 2,750,000
		5	30	\$ 100,000	\$ 500,000	\$ 3,250,000
		10	60	\$ 75,000	\$ 750,000	\$ 4,000,000
		16	96	\$ 50,000	\$ 800,000	\$ 4,800,000
		20	120	\$ 25,000	\$ 500,000	\$ 5,300,000
		<u>27</u>	<u>162</u>	\$ 15,000	\$ 405,000	\$ 5,705,000
		<b>84</b>	<b>498</b>		<b>\$ 5,705,000</b>	
	<b>Major</b>	40	160	\$ 10,000	\$ 400,000	\$ 6,105,000
		55	220	\$ 5,000	\$ 275,000	\$ 6,380,000
		90	360	\$ 2,500	\$ 225,000	\$ 6,605,000
		<u>250</u>	<u>625</u>	\$ 1,000	\$ 250,000	\$ 6,855,000
		<b>435</b>	<b>1365</b>		<b>\$ 1,150,000</b>	
	<b>General</b>	All Others	Below	\$ 1,000	\$ 145,000	\$ 7,000,000
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## Appendix C

### Statement of Need

#### **Polk County Conservation Board Easter Lake Lodge**

*“The purpose of the proposed Easter Lake Lodge is to provide the Metropolitan area with an exceptional Events Center that provides a unique venue for meetings, gatherings and events.” – Mission Statement*

#### **Polk County Conservation Board**

For over 60 years, the Polk County Conservation Board has embraced a long-term vision of protecting, preserving and restoring local natural areas. The voters of Polk County created the PCCB in 1956 – on the heels of the enabling 1955 County Conservation Law that was passed by the Iowa State Legislature.

Today, the board manages 20 park and wildlife areas which are visited by more than 1.8 million people annually. These public recreation areas cover more than 14,000 acres in the state’s most populous county.

The mission is carried out by full-time and seasonal staff, including natural resources specialists, foresters, rangers, environmental educators, administration and support staff. Hundreds of volunteers with interests in protecting the county’s natural spaces and providing outdoor recreation opportunities are also involved.

The board is governed by five members, appointed by the Polk County Board of Supervisors. The board selected Richard A. Leopold as the latest director of the PCCB in 2014. Prior to being appointed director, he served as the deputy and interim director since spring 2013.

Prior to his employment with Polk County, Leopold was the Director of the Iowa Department of Natural Resources from 2007-2010. Following the Iowa DNR, he served as the Assistant Regional Director for Science Applications of the Midwest Region of the U.S. Fish and Wildlife Service.

#### **Easter Lake Park**

Easter Lake Park has been one of central Iowa’s favorite outdoor recreation areas since 1967. The area is currently undergoing a \$22 million renovation that includes the completion of a 10-kilometer trail around Easter Lake, new restroom facilities, water quality improvements (dredging) and upstream watershed improvements.

Dredging the nearly 180-acre lake will be ongoing this year, increasing the water capacity by 30 percent. Dredging will also improve water clarity, creating better habitat for fish, and



making the lake more attractive for fishing, boating and swimming. These improvements address the algal blooms and low oxygen levels that have plagued the lake for decades.

The Easter Lake Park Lodge project will be the crowning achievement to these combined improvements, which all play a part in increasing tourism, environmental education and outdoor recreation opportunities.

The Easter Lake Lodge will serve the metropolitan area with an exceptional events center that provides a unique venue for meetings, gatherings, weddings and other social events.

### **Where We Are Now**

Once renovations are completed, Easter Lake Park is projected to attract 1.5 million visitors a year. With lake water quality improvements and a new trail, it is anticipated that this venue will be highly sought after for organized events such as runs, walks and triathlons. Family activities such as hiking, picnicking, swimming or relaxing are expected to increase.

The proposed site for the Easter Lake Park Lodge is situated within the interior of the park on the peninsula across from the swimming beach. The 13,000-square-foot facility will serve as the capstone for the park's renovations, and it will provide a venue just minutes away from downtown Des Moines, easily accessible by bike or car.

The unique location provides a quiet and scenic atmosphere, conveniently located just five miles from the heart of downtown Des Moines. The park setting along the lake, combined with downtown vistas, creates a picturesque backdrop for any type of function.

Work on improvements to the park began in 2013. The park averages nearly half a million visitors a year. That number is expected to triple after the five-year plan is complete.

The Lodge will provide opportunities for quiet and reflective moments, as well as joyous and celebratory ones, with the backdrop of the scenic expanse of the lake and park. It will be the focal point for Easter Lake Park and a regional draw for the City of Des Moines, improving quality of life for area residents and visitors alike.

### **Where We Need to Go**

The Lodge requires a new level of public-private partnership to secure funding resources to build, and to ensure successful ongoing maintenance and operations for decades to come. Preparing for the Easter Lake Lodge and Events Center with both initial capital and ongoing funding sources will ensure the facility can fulfill its promise to the people of Central Iowa.

The Easter Lake Park Lodge will be more than a state-of-the-art facility with beautiful views. The Lodge is designed as an event center rental facility with interior seating for 300 and an exterior deck overlooking the lake that can hold 250 people. The surrounding area will



include walking trails, woodland gardens, native landscapes, an outdoor amphitheater and parking for 200 vehicles. The lodge will be used by area businesses and residents for social and business gatherings such as business meetings, reunions, weddings, retreats and more and by Polk County Conservation for environmental education classes.

The Lodge will be highly functional for, and beneficial to, the community, businesses and private groups. It will aid the entire property by attracting additional tourism and provide an additional revenue stream for park upkeep and future initiatives.

### **Why We Need You**

The cost of building the Easter Lake Park Lodge is approximately \$8 million. The Polk County Conservation Board will need the support of the many generous people and businesses in our community to reach the fundraising goal of \$7 million.

The cost breakdown of the project is as follows:

- Building construction (including site development): \$6,391,873
- Design: \$575,269
- Other professional services: \$119,325
- Contingency: \$639,187
- Furniture, fixtures and equipment: \$187,177

To date, Polk County has secured \$650,000 in funding for the Easter Lake Lodge project. The Polk County Water & Land Legacy bond referendum will provide \$400,000 in funding, in addition to the \$250,000 that Polk County currently plans to invest. Additional bond funds may be considered if needed to match or leverage private contributions, but are recommended not to exceed a combined total of \$1 million.

The Polk County Conservation Board asked the consulting firm of Amperage Fundraising Advisers to assess the feasibility of generating private funding for this project. Your insights regarding this project and your perception of public support are needed as the Polk County Conservation Board prepares to offer education and recreation options to the surrounding community through the Easter Lake Park Lodge. Working together, we can move this project from vision to reality.

(Project renderings also included)

