

## Memorandum

To: Honorable Mayor and Members of the City Council

From: Martin Lyons, Assistant City Manager/Treasurer  
Robert Dorneker, Interim Director Parks, Recreation & Community Services  
Karen Danczak Lyons, Library Director

Subject: Robert Crown Center Fund Raising Feasibility Study

Date: January 14, 2016

Recommended action:

Staff recommends the City Council review the Feasibility Report (Phase I of total Fund Raising Project) from CCS. At the June 15, 2015 City Council meeting, the Council approved a total contract of \$477,500. This report recommends the City and Library proceed with a fund raising campaign for the Robert Crown Community Center.

Summary:

Attached is the "Campaign Planning Study" for the Robert Crown Community Center. Representatives of the Robert Crown Committee, staff, and CCS will provide a presentation summarizing the Planning Study findings at the January 19, 2016 Council Meeting.

The Campaign Planning Study was conducted to determine the feasibility of raising funds for the renovation/replacement of the Robert Crown Center. The results of the Study show that there is sufficient evidence to proceed with a fund raising campaign for the Robert Crown Center. This evidence was based on more than 50 one on one interviews as well as over 800 responses to an on-line survey to gauge financial support for the project.

The total amount of funds that could be expected from this campaign will vary based on the amount of large gifts received in the early phases of the campaign. Another key area of the fund raising campaign will be the naming of specific facilities such as the main ice rink, gym, library, etc. Given the above, CCS has included the following as estimates for a fund raising campaign:

- \$3.0 - \$5.0 Million for gift giving based on the planning study and survey.
- This figure does not include the upward impact of a large gift which could then produce other large gifts increasing the total amount substantially.
- Capital Naming Opportunities

<b>Naming Category</b>	<b>Estimated Minimum</b>	<b>Estimated Maximum</b>	<b>Avg. Total Possible</b>
Facility	\$ 5,000,000	\$ 10,000,000	\$ 7,500,000
Ice Rink/Turf Field/Gym/Library*	\$ 1,000,000	\$ 3,000,000	\$ 10,000,000
Track/Reading Garden/Lobby	\$ 250,000	\$ 500,000	\$ 1,125,000
Other Features (Bleachers/Multipurpose rooms, etc)	\$ 250,000	\$ 500,000	\$ 375,000
<b>Average Total Possible</b>			<b>\$ 19,000,000</b>

\*This line could include six different opportunities so the Avg. Total Possible reflects this amount.

It is not likely and probably not advisable to name all other facility/features listed in the CCS report and staff is not suggesting that a total of \$19.0 million in capital naming revenue is realistic. That being said, as a part of the fund raising campaign, CCS, community volunteers and staff will be working toward fund raising efforts that come from basic gift giving, large gifts, and capital naming. Please note that major gifts could also be made along with a capital naming request, and therefore there is overlap in the three categories.

Next Steps:

Several major activities need to be accomplished over the next one to two years to be successful in raising the funds to replace the Robert Crown Center:

1. Fund Raising Campaign
  - a. 12 to 24 months in duration
  - b. Will require additional marketing materials/visioning documents
2. Creation of 501(c) 3 Corporation to hold funds
  - a. Staff has already started the creation of bylaws
  - b. Community input and creation of Board of directors
  - c. Corporation could be beneficial to future capital funding beyond the Robert Crown Center
3. Construction and Design
  - a. Design to begin at Council approved date (target 3<sup>rd</sup> or 4<sup>th</sup> Quarter 2016)
  - b. Construction Nine Months after design is initiated
  - c. Public input Phase

4. Operations and Maintenance Costs for future facility defined
  - a. Define future operating revenues
  - b. Create escrow/reserve for future maintenance

Based on City Council review, City and Library staff will begin work with CCS on the above components, bringing issues before the City Council and Library Board for approval and for critical input as needed and required. Specifically, City and Library staff will begin work with CCS on the organization of the Fund Raising Campaign and the structure of a Parks/Library Foundation to administer all funds being donated. A report will be provided to the City Council and Library Board in April.

Attachments:

CCS Report, December 7, 2015

Council Memo and CCS Approval, June 15, 2015



ROBERT CROWN COMMUNITY CENTER

# Exploring Our Future

## A Campaign Planning Study for the Robert Crown Community Center

Final Report  
December 7, 2015



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## Acknowledgements

CCS is pleased to present this Campaign Planning Study Final Report to the Planning and Advisory Committees for the Robert Crown Community Center. The City of Evanston's commitment to the study is a testament to the City leadership's dedication to continuous improvement for the benefit of Evanstonians. It has been our privilege to serve as your partner during an important fundraising planning effort. We hope this report proves to be a valuable planning tool as the City of Evanston looks toward the future of the Robert Crown Community Center.

We would like to express our sincere appreciation and gratitude for the leadership, guidance and support we have received throughout the study process. We are grateful to:

Bob Dorneker   Melissa Parker   Petra Belcher  
Stefanie Levine   Karen Danczak Lyons   Martin Lyons   Wynn Shawver  
David Hodgman   Brian Miller   Daniel Stein   Michael Tannen   Donald Wilson

CCS would like to acknowledge the generosity of the interviewees and online survey respondents who gave their time and insight to ensure meaningful study results.

### The CCS Study Team

Peter Hoskow, Corporate Vice President, Managing Director-Midwest Operations  
Travis Carley, Corporate Vice President  
Laura Aikens, Corporate Vice President  
Brooke Laskin, Associate Director  
Mari Fecarotta, Information & Special Projects Coordinator  
Kim Dooley, Executive Systems Support Manager



## Methodology and Timeline

In late summer, CCS began preparation for a comprehensive Campaign Planning Study to gauge community support for a new facility at the Robert Crown Community Center site. Specifically, CCS's engagement was guided by the following objectives:

- **Evaluate** overall perceptions of the Robert Crown Community Center, Parks and Recreation Department, and Evanston Public Library
- **Test** reactions to the proposed case elements and a campaign goal of as much as \$20 million
- **Assess** constituents' willingness to support the campaign through volunteering or making financial contributions
- **Identify** individuals willing and able to serve leadership roles
- **Reveal** obstacles to fundraising success
- **Develop** an appropriate campaign plan with an achievable fundraising goal and timetable

**To achieve our goals and provide strategic recommendations, CCS undertook the following activities:**

1. **Strategic Conversations:** Constituents were identified to be involved in a minimum of 50 interviews. A total of 145 individuals were invited to participate. CCS engaged in a total of 57 strategic conversations from September 16 through November 20.
2. **Online Surveys:** An online survey was emailed to a broader group of constituents on November 6, 2015. The 4,755 invitees included users of the Robert Crown Community Center within the past three years and a selection from Evanston Public Library's mailing list. A total of 837 individuals completed the online survey.
3. **Philanthropic Landscaping:** To further identify fundraising potential in the region, research was conducted on individual and foundation philanthropy.



## Executive Summary

The data, observations, and recommendations presented in this Campaign Planning Study Final Report are based on 57 strategic conversations conducted from September 16, 2015 through November 20, 2015, as well as 837 online survey responses received between November 6, 2015 and November 23, 2015. The results of this study are valuable for planning a potential campaign.

### Strategic Conversation Key Findings

- The Robert Crown Community Center is well regarded by interviewees, but is recognized to be in need of physical improvement.
- The most commonly cited strengths of the Robert Crown Community Center was its location and ice access.
- Seventy-three percent of interview respondents reacted either “very positively” or “positively” to the proposed plans at the site of the Robert Crown Community Center.
- Interview respondents prioritized the components of the initiative as follows:
  - 1). Increased Scope of Facilities\* 2). Expanding Current Educational Programming 3). Expanding Fitness/Recreation Programming
  - 1). Gym\*\* 2). Ice 3). Library with Reading Courtyard\*\*\* 4). Outdoor Turf Fields 5). Ball Diamonds 6). Indoor Track 7). Playground
- Sixty-five percent of interview respondents indicated they are willing to consider making a gift to the initiative.

*\*Increased scope of facilities is defined as expanding overall square footage to allow for a library with a reading courtyard, athletic spaces, educational rooms, offices, bathrooms, locker rooms, storage, etc.*

*\*\*Gym is defined as a multipurpose indoor space for basketball, volleyball, soccer, taekwondo, gymnastics, etc.*

*\*\*Percentages represent respondents’ prioritization of the library only, and are not inclusive of a response to a reading courtyard.*

*Note: All 57 interviewees did not respond to every question. Percentages are based on total number of interview respondents.*



## Online Survey Key Findings

- Ninety-five percent of online survey respondents feel the programs and services offered at the Robert Crown Community Center are either “highly valuable” or “valuable.”
- Seventy-four percent of online survey respondents reacted “very positively” or “positively” to the proposed plans for a new facility. Fifty-eight percent of online survey respondents reacted “very positively” or “positively” to the proposed plans for a renovation and addition.
- Online survey respondents prioritized the components of the initiative as follows:
  - 1). Increased Scope of Facilities\* and Expanding Current Fitness/Recreation Programming (tied for first place) 3). Expanding Current Preschool/After School Programming
  - 1). Ice 2). Gym\*\* 3). Playground 4). Library with Reading Courtyard 5). Indoor Track 6). Ball Diamonds 7). Outdoor Turf Field 8). Indoor Turf Field
- Forty-seven percent of online survey respondents are willing to consider making a gift to the initiative.

## Gift Indications

The combined gift indications from the 29 interview respondents and 717 online survey respondents total between \$557,525 and \$1,309,078.

*\*Increased scope of facilities is defined as expanding overall square footage to allow for a library with a reading courtyard, athletic spaces, educational rooms, offices, bathrooms, locker rooms, storage, etc.*

*\*\*Gym is defined as a multipurpose indoor space for basketball, volleyball, soccer, taekwondo, gymnastics, etc.*

*Note: All 57 interviewees did not respond to every question. Percentages are based on total number of interview respondents.*

## Observations and Evaluation

From the study findings, CCS made the following observations:

- While CCS did not uncover gift indications in the 7 or 8-figure range, there is significant upside to campaign potential if such lead gift(s) can be secured.
- Evanston is a community with civic pride that values the Robert Crown Community Center and the services it provides.
- A reimagined facility has been a long pursued initiative within the community and a significant portion of respondents are willing to help make the vision a reality.
- The proposed plan is unique in that the vision is reliant on private, philanthropic investment in a tax-supported entity.
- There is a need to articulate and explain the impact and value of the envisioned Robert Crown Community Center.

CCS made the following evaluations of the case for support, campaign leadership, potential prospects, and campaign plan.

- **Case:** The project should be reflective of the character and culture of Evanston by creating a platform for an improved quality of life through the legacy of Evanstonian generosity. The added value of a library branch to the site of the Robert Crown Community Center should be depicted. The urgent need for expanded and improved recreation and athletic facilities should be outlined.
- **Leadership:** Compared to traditional fundraising efforts, the Robert Crown Community Center is a unique proposal because it has no existing leadership board. In order to secure community buy-in and instill confidence that the project is moving ahead, key leadership must extend beyond City leadership and the library board. Strong leaders with a commitment to volunteerism exist in Evanston.
- **Prospects and Plan:** Great potential exists within the Evanston community, and there is a strong sense that many yet unidentified prospects exist. A foundation for this initiative needs to be developed and a 501(c)(3) status must be obtained.



## Recommendations

Based on thoughtful analysis, CCS recommends the following action items for a potential campaign.

1. Approach Top Prospects and Allow Gift Indications to Inform the Project Scope
2. Move Forward with a Campaign with a Working Goal of \$3 to \$5 Million Beyond any Lead Gifts and City Investment
3. Focus the Case for Support on Community Impact
4. Utilize a Phased Approach that is Targeted and Tailored- Top Down and Inside Out
5. Develop a Campaign Plan with a 12 to 24 Month Timeline and Activity Benchmarks
6. Recruit Campaign Leadership to Commence Planning
7. Establish and Follow a Disciplined Prospect Engagement Process
8. Provide Options for Donor Recognition through Naming Opportunities
9. Develop an Internal Campaign Infrastructure
10. Resource and Staff Campaign Properly



## Strategic Conversation Findings



## Interviewees

The Planning and Advisory Committees for the Robert Crown Community Center Campaign Planning Study, with assistance from the CCS team, invited 145 individuals to interview during the planning process. Findings from the strategic conversations that took place from September 16, 2015 through November 20, 2015 are included in this report.

*Note: All 57 interviewees did not respond to every question. Percentages are based on total number of interview respondents.*



## Interviewee Background

Sixty-three percent of interview respondents began their involvement 15+ years ago. A majority of interview respondents' involvement with the Robert Crown Community Center originated from the following:

- Own use of the facility and programs during their youth (first generation user)
- Children's use of the facility and programs

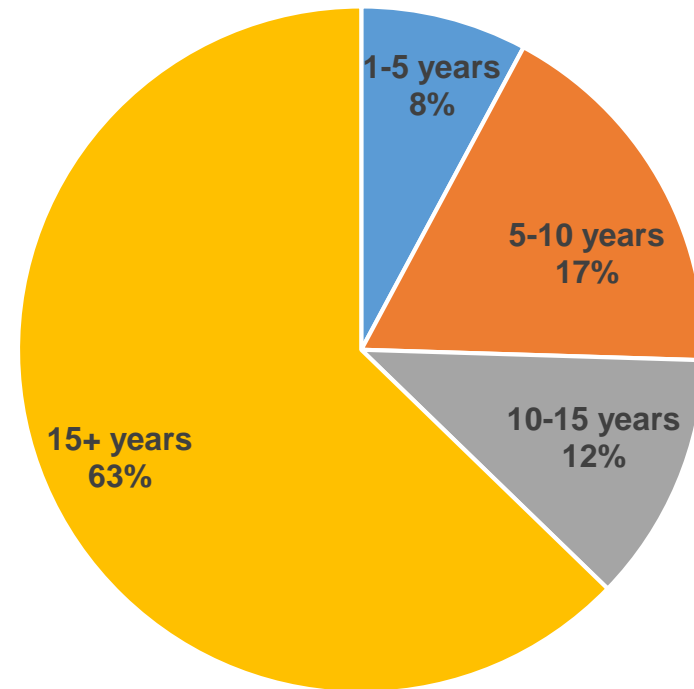
### Sample Comments

*"We used to go to Robert Crown five times a week. But, it's maybe been ten years since I was last there."*

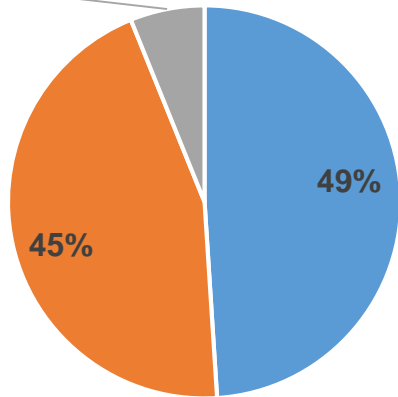
*"I grew up in Evanston and have fond memories of the place. All of my daughters learned how to skate at Robert Crown."*

*"We're not from here originally, but we enrolled our kids in taekwondo and skating classes at Robert Crown after moving to Evanston."*

When did your involvement begin?

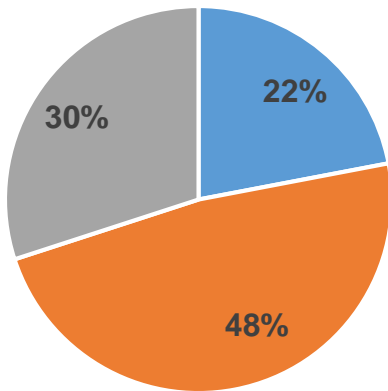


How familiar are you with the Robert Crown Community Center?



■ Very Familiar ■ Somewhat Familiar ■ Little-to-No Familiarity

How familiar were you with the proposed plans?



■ Very Familiar ■ Somewhat Familiar ■ Little-to-no Familiarity

## Interviewee Background

Ninety-four percent of interview respondents were either “very familiar” or “somewhat familiar” with the facility and its programs and services. Prior to receiving the Background Statement and interview invitation, 70% of interview respondents indicated they were “very familiar” or “somewhat familiar” with the proposed plans for the Robert Crown Community Center.

### Sample Comments

*“It’s been a point of discussion for over a decade.”*

*“I’ve read some articles in the Evanston Roundtable about the initiative.”*



## Overall Perceptions of the Robert Crown Community Center

Forty-three percent of interview respondents have a mixed perception when considering both the state of the facility and its offerings. Interview respondents indicated the programs and services provided by the Robert Crown Community Center are highly valuable; however, significant renovations to the facility are long overdue.

### Sample Comments

*"It's like a well-worn coat or shoes."*

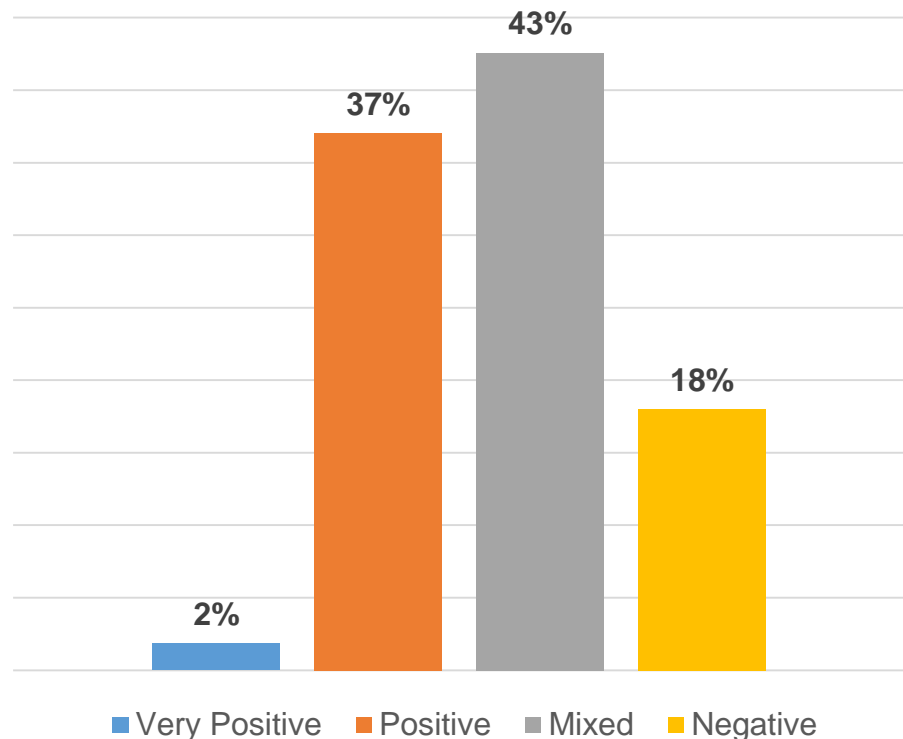
*"There's a lot of potential for great things to happen here."*

*"It's clearly needed and important for the community."*

*"Well-loved, but lacks in comparison to other facilities."*

*"It's a critical institution to maintain in that part of Evanston."*

What is your overall perception of the Robert Crown Community Center?





## Strengths and Challenges

Strengths: Robert Crown Community Center	# of Respondents
Location	16
Rink Availability	15
Athletic/Programming Options	8
Strengths: Parks and Recreation / Public Library	# of Respondents
Programming Options	11
Public Access and Support	8
Library System	8
Challenges	# of Respondents
Funding	25
Facility and Program Quality	12
City Project Competition	10

The most commonly cited strength for the Robert Crown Community Center was its location. Many interview respondents indicated that the site serves a diverse cross-section of the community. The facility offers many programming options, and it is the only facility in Evanston offering ice rinks.

Many interview respondents indicated both the Parks and Recreation Department and Evanston Public Library offer a range of programs, many of which are affordable. Overall, interview respondents seem to be impressed with the library system and the number of parks available for the community.

A large proportion of interview respondents cited resources as an obstacle for these entities. Interview respondents noted the state of the facilities and programs lacks in comparison to surrounding communities, such as Skokie and Wilmette.



## Overall Reaction to Proposed Plans

Seventy-three percent of interview respondents reacted “very positively” or “positively” to the proposed plans at the site of the Robert Crown Community Center.

### Sample Comments

*“Something has to be done.”*

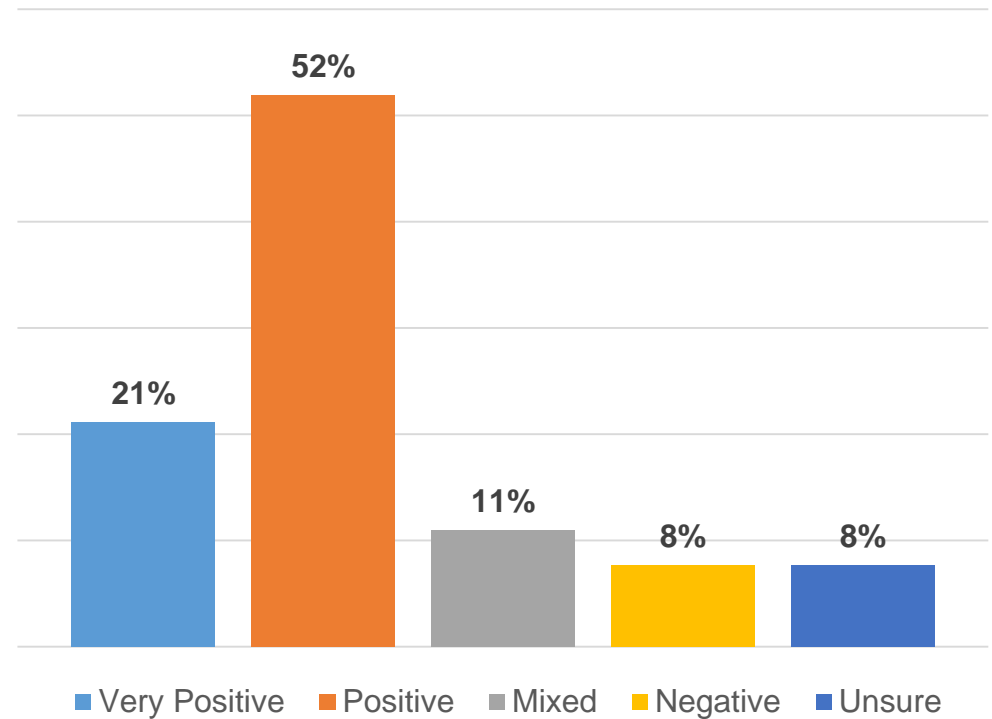
*“More community partners could be involved beyond the library.”*

*“Two rinks could make Evanston a destination– a tournament worthy city.”*

*“It’s an impressive sketch, but can we afford it?”*

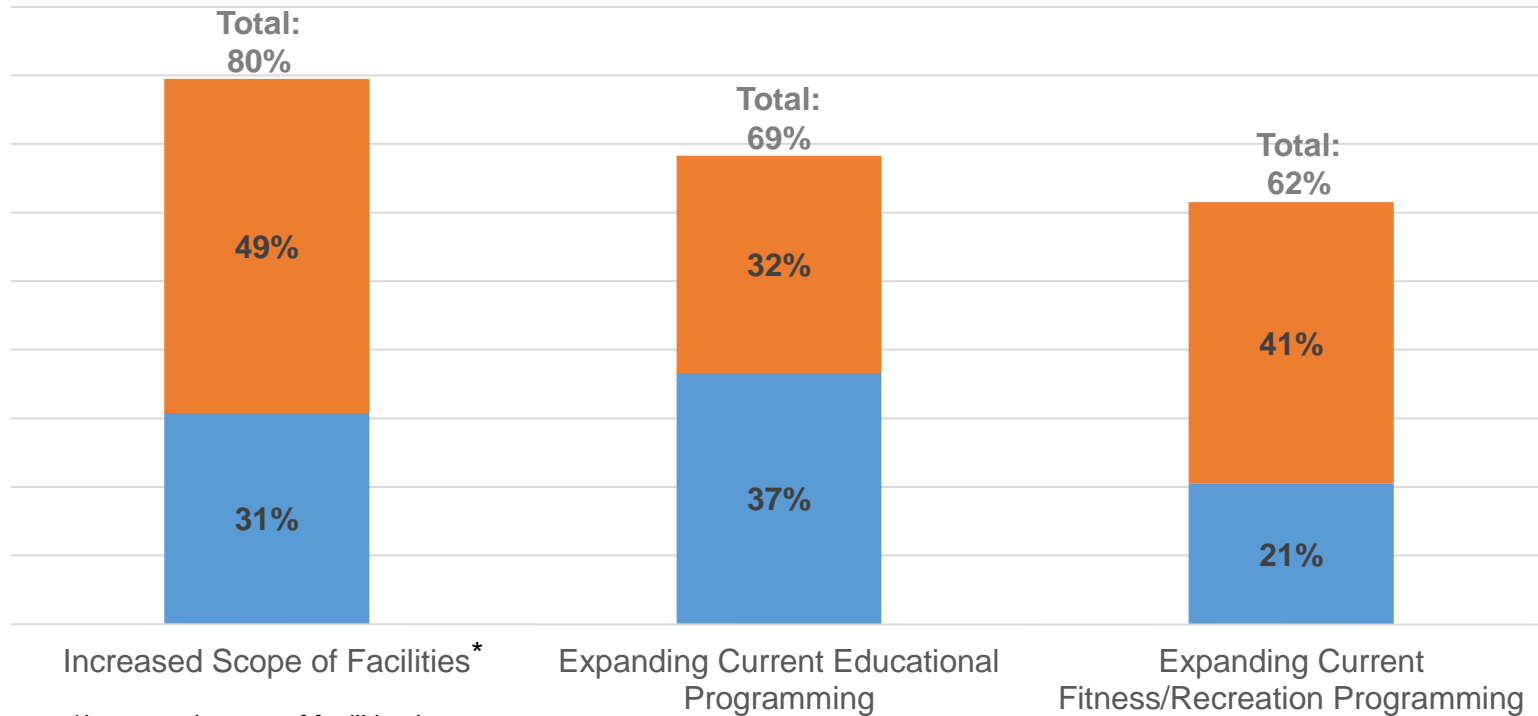
*“I always wondered why there was no library branch on the west side of town.”*

### What is your overall reaction to the proposed plans?



## Reaction to Case Elements

Please rate the following components of the initiative:



Increased Scope of Facilities\*

\*Increased scope of facilities is defined as expanding overall square footage to allow for a library with a reading courtyard, athletic spaces, educational rooms, offices, bathrooms, locker rooms, storage, etc.

Expanding Current Educational Programming

■ Very Important ■ Important

Expanding Current Fitness/Recreation Programming



## Reaction to Case Elements

### Increased Scope of Facilities

- Eighty percent of interview respondents believe it is “very important” or “important” to prioritize

### Expanding Current Educational Programming

- Sixty-nine percent of interview respondents believe it is “very important” or “important” to prioritize

### Expanding Fitness/Recreation Programming

- Sixty-two percent of interview respondents believe it is “very important” or “important” to prioritize

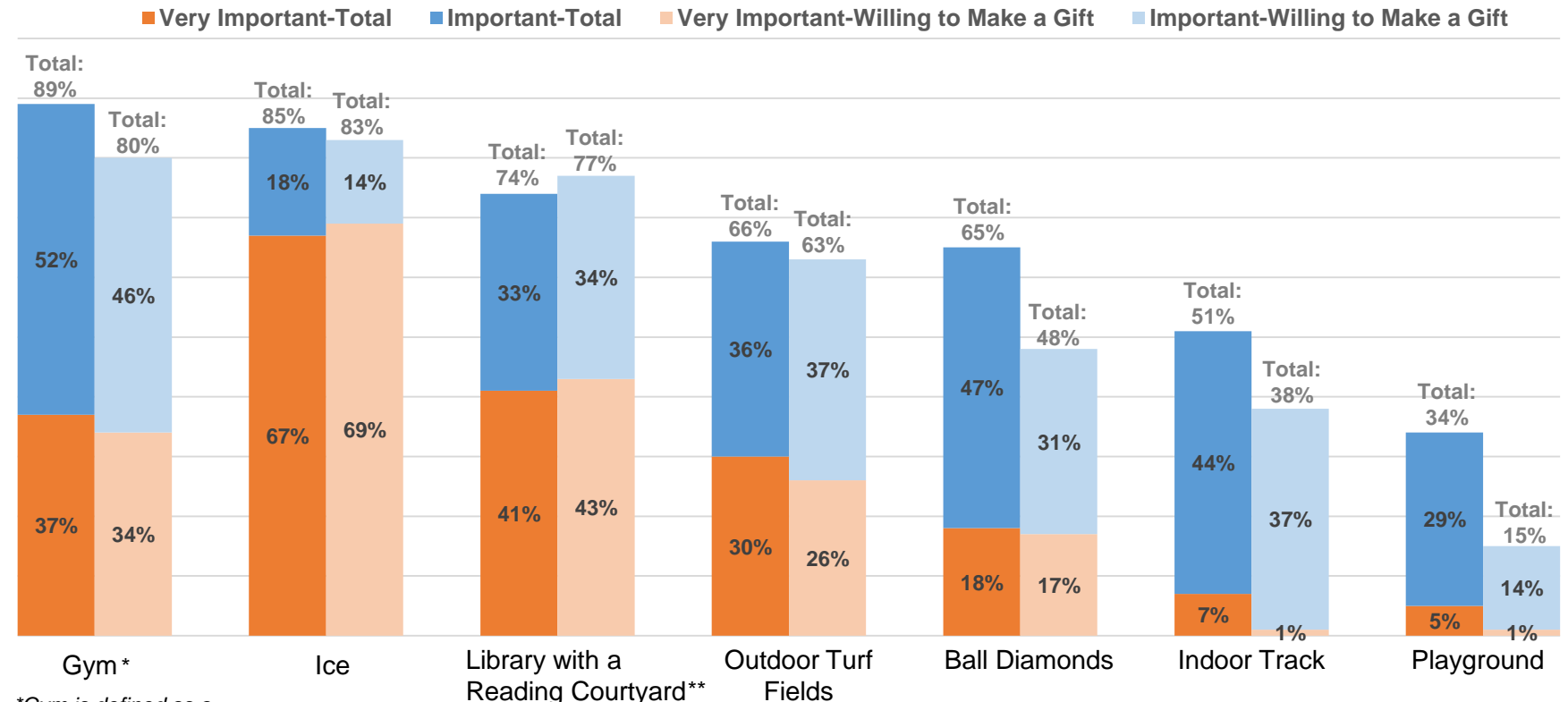
## Sample Comments

*“I need to see more information about why these needs exist.”*

*“I support increasing program offerings, but are any of the proposed programs duplicative of other community centers?”*

## Reaction to Case Elements

Interviewees were asked how they would prioritize the proposed facility features. Total interviewee responses are shown side-by-side with only those indicating a willingness to make a gift to a campaign for the Robert Crown Community Center.



\*Gym is defined as a multipurpose indoor space for basketball, volleyball, soccer, taekwondo, gymnastics, etc.

\*\*Percentages represent respondents' prioritization of the library only, and are not inclusive of a response to a reading courtyard.

## Reaction to Case Elements

Highest Priority	Middle Priority	Lowest Priority
<ul style="list-style-type: none"><li>• Gym</li><li>• Ice</li><li>• Library/Reading Courtyard</li></ul>	<ul style="list-style-type: none"><li>• Outdoor Turf Fields</li><li>• Baseball Diamonds</li></ul>	<ul style="list-style-type: none"><li>• Indoor Track</li><li>• Playground</li></ul>

### Sample Comments

*“A gym is critical to have in that area, we might even need two.”*

*“More ice would mean our players would get more practice time.”*

*“There are so many playgrounds in Evanston, and Washington Elementary has one so close.”*

*“Lighted fields are extremely needed in Evanston.”*

### Additional Areas of Need

Improved food and beverage options, beyond typical concessions, were the most frequently mentioned request. Interview respondents indicated they would like the concept to include a lounge area and healthier options.

Other Areas of Need	# of Respondents
Café/Lounge Area with Improved Food Options	16
Swimming Pool	7
Indoor Turf Field/Convertible Indoor Athletic Space	7
Retail Store	5

#### Sample Comments

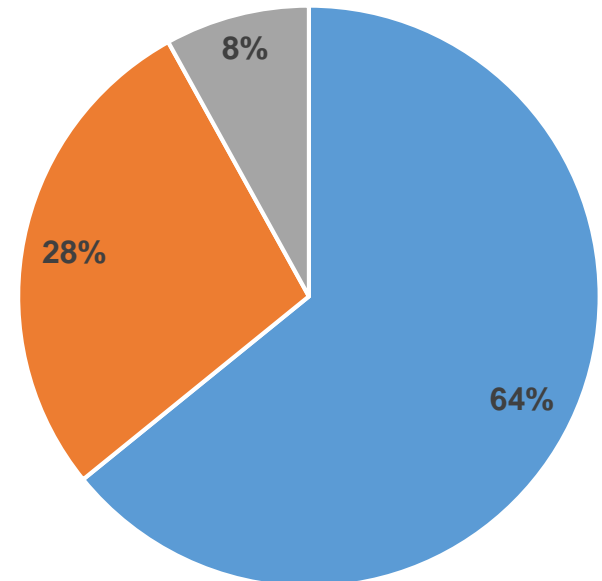
*“A pro shop could bring in revenue.”*

*“During the hockey off season, why not convert the space into something else?”*

*“Evanston needs an indoor/outdoor public pool—that would elevate my interest in this project.”*

*“Kids need healthy options, parents need a place to hang out while their kids are playing sports. A café in that area could appeal to those who don’t even use Robert Crown.”*

Are there other areas of need not addressed in the proposed plan?

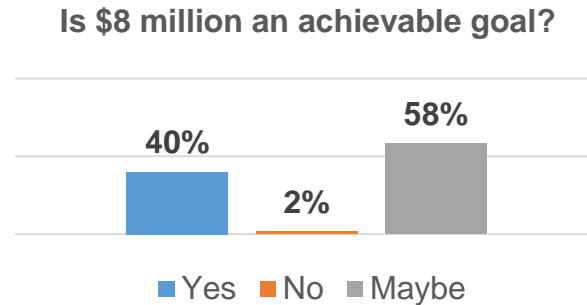
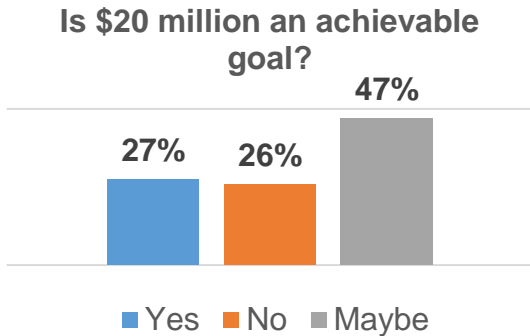


■ Yes ■ No ■ Unsure

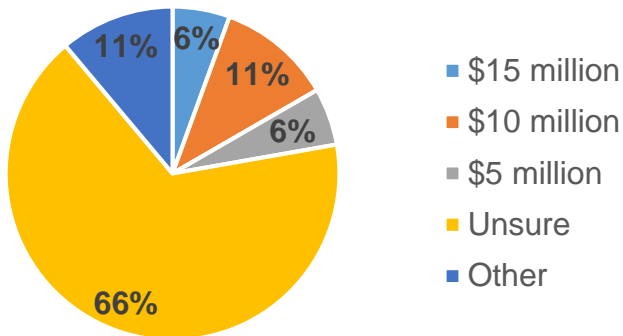


## Achievability of Goal

A majority of interview respondents are skeptical about the ability to achieve both proposed private fundraising goals.



**If not, in your opinion, what do you think is a more achievable goal?**



**Sample Comments**

*“For Evanston this an achievable goal, but I’m not sure about this project.”*

*“People are already paying taxes and may feel that is enough of a contribution.”*

*“Does this include maintenance costs?”*

*“This is a valuable investment for the City.”*



## Campaign Timing and Challenges

Fifty-seven percent of interview respondents believe now is the ideal time to move forward with a campaign for the Robert Crown Community Center.

Campaign Challenges	# of Respondents
Engaging Donors	24
Project Competition	20
Effective Case	9
Leadership	9

### Sample Comments

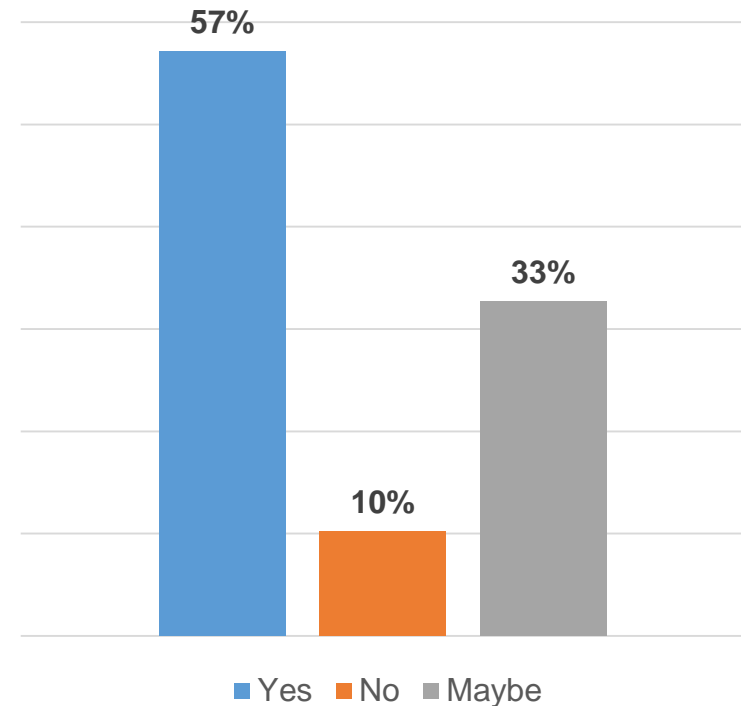
*“There are so many asks right now.”*

*“Some major campaigns are wrapping up and others are not yet positioned to begin—so yes.”*

*“The economy seems to be improving.”*

*“It’s been talked about for years—why now and will it even happen?”*

Is now the right time to move forward with a campaign for the Robert Crown Community Center?



## Personal Involvement

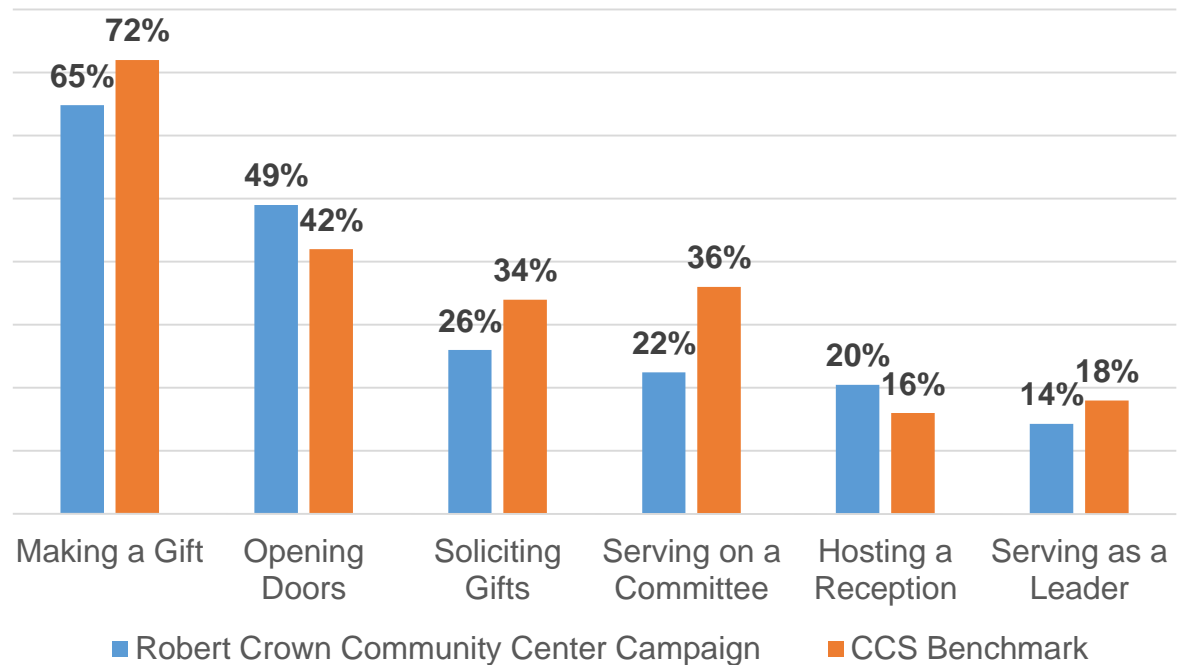
Sixty-five percent of interview respondents are willing to make a gift to a campaign for the Robert Crown Community Center.

### Sample Comments

*“My kids no longer use Robert Crown, but I see the value of the place and am willing to support it.”*

*“Once some of my current volunteer roles ends, I’d be willing to help out in any way I can.”*

In this campaign, would you be willing to consider the following?



## Potential Gifts

Commemorative and memorial opportunities could be well-received in the community, but Evanstonians will ultimately make a gift based on an effective case.

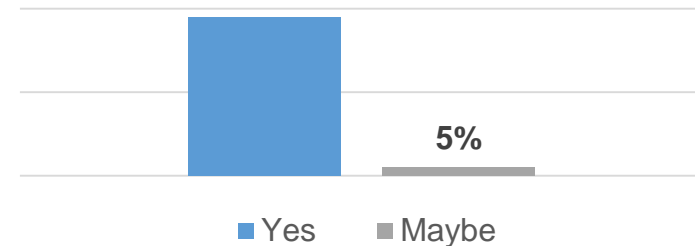
### Sample Comments

“I sometimes give anonymously, but a lot of people like to receive recognition.”

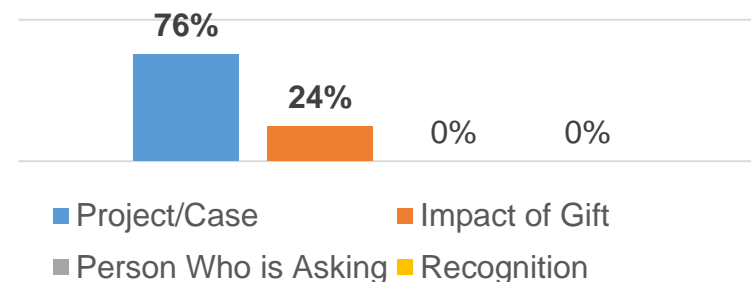
“Name everything if you can. Bricks, parking spots, benches...”

“Recognition is nice to receive, but I make gifts based on my personal interests and beliefs. I need to believe in the cause.”

Do you believe donors would be interested in possible commemorative or memorial opportunities?



If you were to consider a gift to the Robert Crown Community Center, what is most important to you?



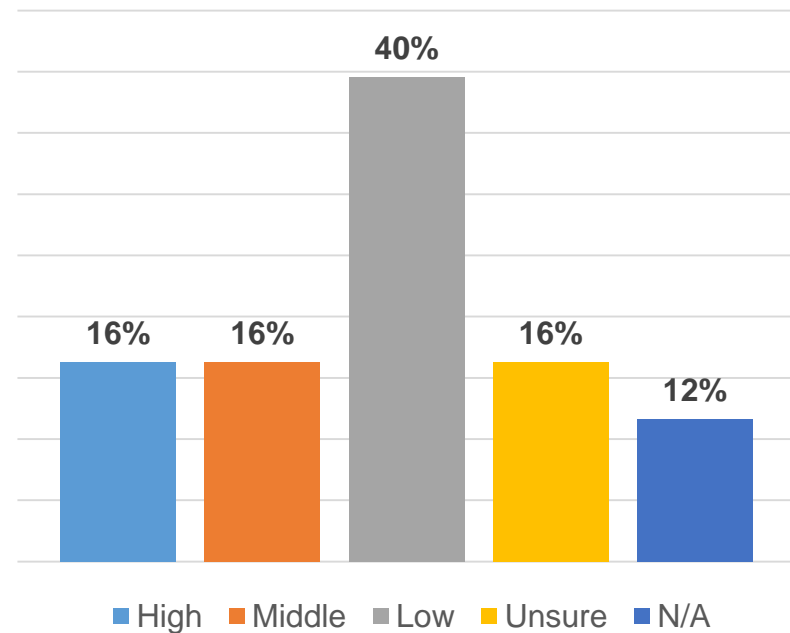
## Potential Gifts

The Robert Crown Community Center falls low in relation to a majority of interview respondents' other philanthropic priorities; however, it is important to note this philanthropic opportunity is a novel concept.

### Sample Comment

*"My passions are elsewhere— social services, youth development, and education."*

### Where do you see the Robert Crown Community Center fitting in your philanthropic priorities?



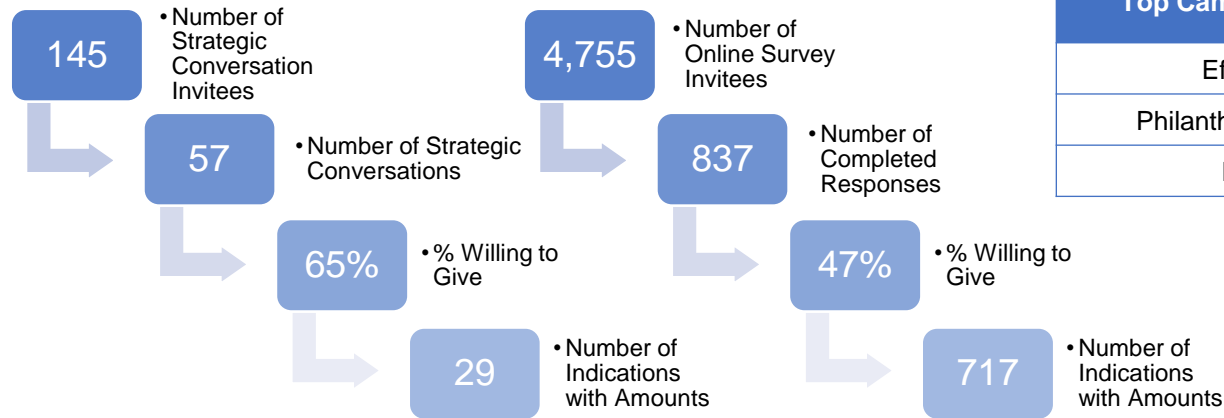
### Potential Gift Range

Thirty-five of the 57 total interviewees indicated they would be willing to consider making a gift to the campaign. Twenty-nine of these 35 respondents indicated the amount of the gift they would consider making to a campaign for the Robert Crown Community Center. A total of 717 online survey respondents indicated the gift level that would be within their capabilities over a five-year period.

The combined indications from the 29 interview respondents and 717 online survey respondents are shown in the Table of Gift Indications. The high and low-range for each indication is included.

The potential gift range at present is based off of two sets:  
 1. Strategic Conversation Invitees  
 2. Online Survey Invitees

Gift Ranges	Low Indication #	Low Indication \$	High Indication \$	High Indication #
\$100,000+	1	\$100,000	\$200,000	2
\$50,000+	1	\$50,000	\$149,999	2
\$25,000+	-	-	\$55,000	2
\$10,000+	14	\$160,000	\$140,000	13
\$5,000+	17	\$85,000	\$144,989	18
\$1,000+	80	\$86,000	\$383,426	80
Below \$1,000	633	\$76,525	\$235,664	629
Totals	746	\$557,525	\$1,309,078	746



Top Campaign Challenges	# of Respondents
Effective Case	30
Philanthropic Competition	26
Leadership	9



## Online Survey Findings

## Online Survey Overview

On November 6, a 12-question online survey was sent via email to 4,755 constituents possessing a relationship with the Evanston Public Library and/or the Robert Crown Community Center. From the number of the total invitations sent, 4,536 were successfully delivered.

By November 23, CCS received a total of 837 completed responses, amassing a response rate of 18.45%. This response rate is high compared to other online survey response rates received by CCS, indicating a very engaged constituency. Of the 837 completed responses, 107 respondents requested to have someone follow up with them regarding their feedback.

Statistical Summary: Respondents' Relationships with the Initiative	
I am a user of the programs/services at the Robert Crown Community Center.	28%
I am a former user of the programs/services at the Robert Crown Community Center.	22%
My child is a user of the programs/services at the Robert Crown Community Center.	50%
My child is a former user of the programs/services at the Robert Crown Community Center.	32%
I live within 1 mile of the Robert Crown Community Center.	33%
I am a library member.	68%
I am a library donor.	20%

## Online Survey Findings Summary

### **In general, the results of the online surveys affirm the findings of the interviews.**

- Ninety-five percent of the online survey respondents feel the programs and services offered at the Robert Crown Community Center are either “highly valuable” or “valuable.” Although many interview respondents had “mixed” overall perceptions of the Robert Crown Community Center due to the state of the facility, they had a positive perception of the programs and services offered there.
- A majority of interview respondents and online survey respondents had an overall “very positive” or “positive” reaction to the proposed plans. Seventy-four percent of online survey respondents reacted “very positively” or “positively” to the proposed plans for a new facility. Fifty-eight percent of online survey respondents reacted “very positively” or “positively” to the proposed plans for a renovation and addition.
- When asked to evaluate the importance of each aspect proposed for the plan, a majority of online survey respondents and interview respondents cited ice rinks, a gym, and a library/reading courtyard within the top four case elements.
- Seventy-one percent of online survey respondents believe now is the right time to move forward with a campaign for private investment.

### **Variance occurs largely at the importance of the other aspects proposed for the plan.**

- Seventy-four percent of online survey respondents cited the playground as being “very important” or “important” to include compared to 34% of interview respondents.
- Seventy percent of online survey respondents cited the indoor track as being “very important” or “important” to include compared to 51% of interview respondents.

### **New data was captured on the importance of outdoor versus indoor turf.**

- Fifty-nine percent of online survey respondents cited an outdoor turf field as “very important” or “important,” compared to 49% citing the same for an indoor turf field.

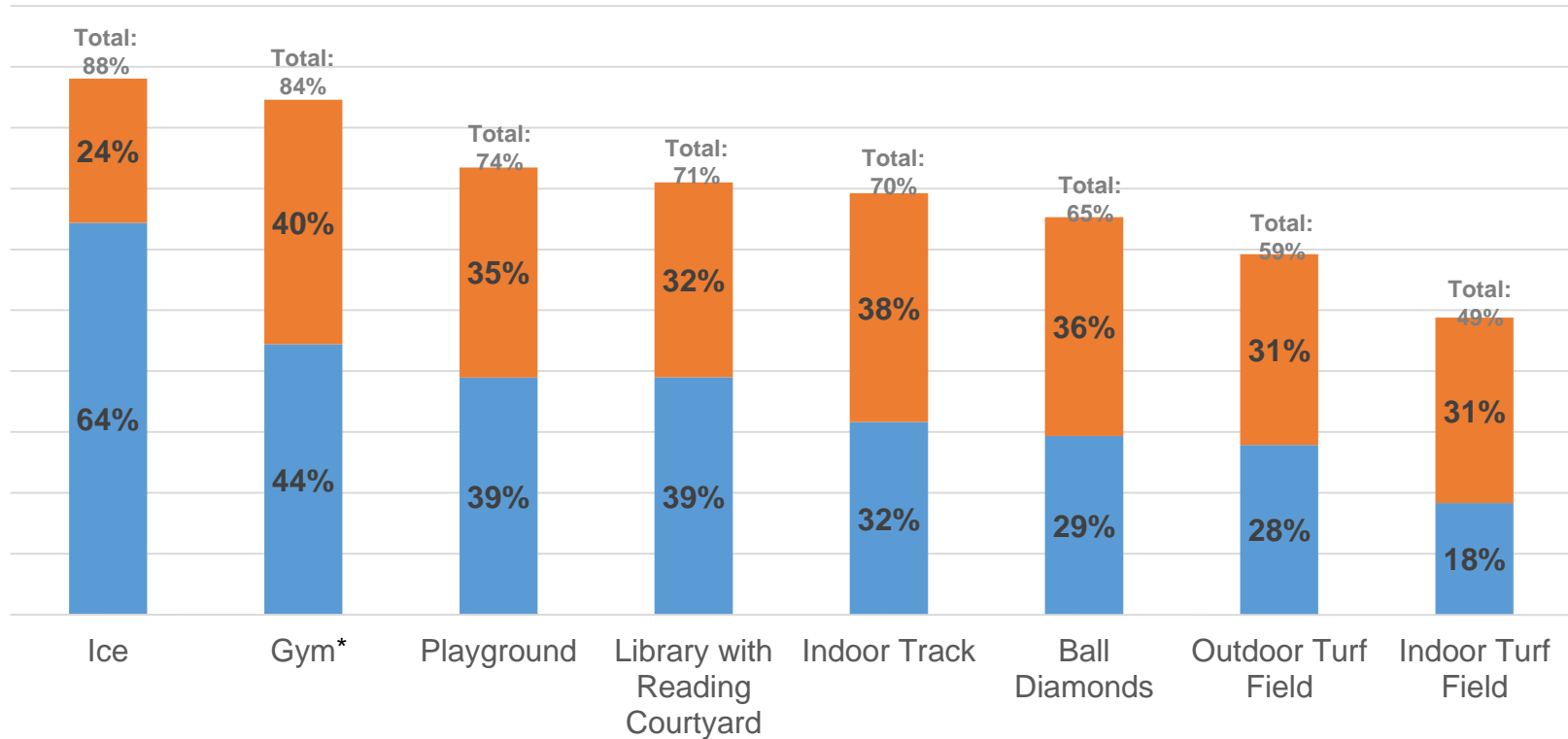
**Full results of the online surveys can be found in the appendix.**





## Reaction to Case Elements

Please evaluate the importance of each aspect:

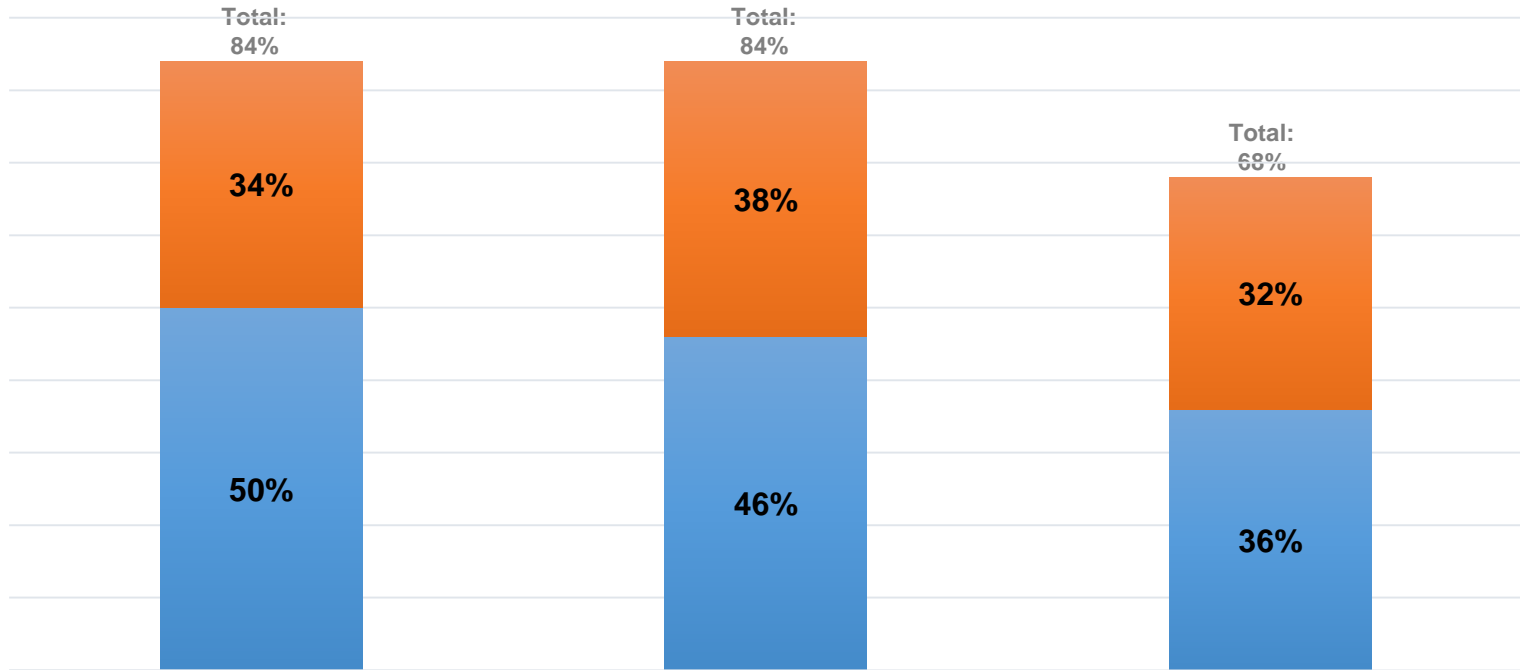


\*Gym is defined as a multipurpose indoor space for basketball, volleyball, soccer, taekwondo, gymnastics, etc.

■ Very Important ■ Important

## Reaction to Case Elements

Please evaluate the importance of each aspect:



Increased Scope of Facilities

*\*Increased scope of facilities is defined as expanding overall square footage to allow for a library with a reading courtyard, athletic spaces, educational rooms, offices, bathrooms, locker rooms, storage, etc.*

Expanding Current Fitness/Recreation Programming

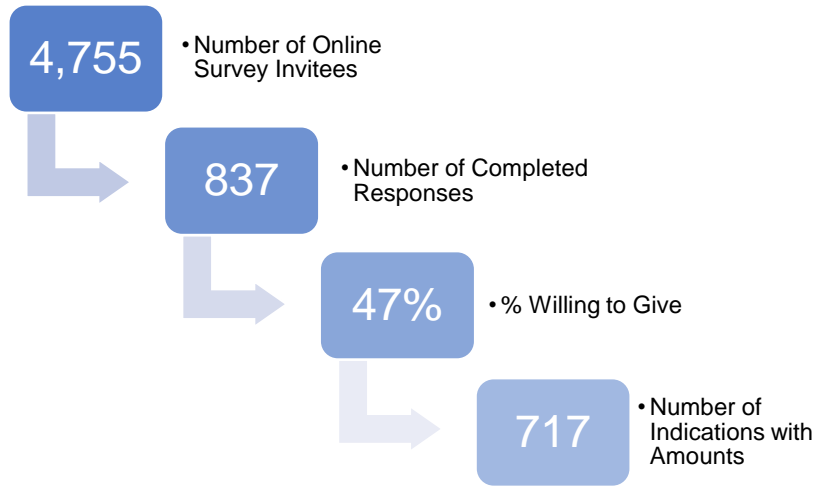
Expanding Current Preschool/After School Programming

■ Very Important ■ Important

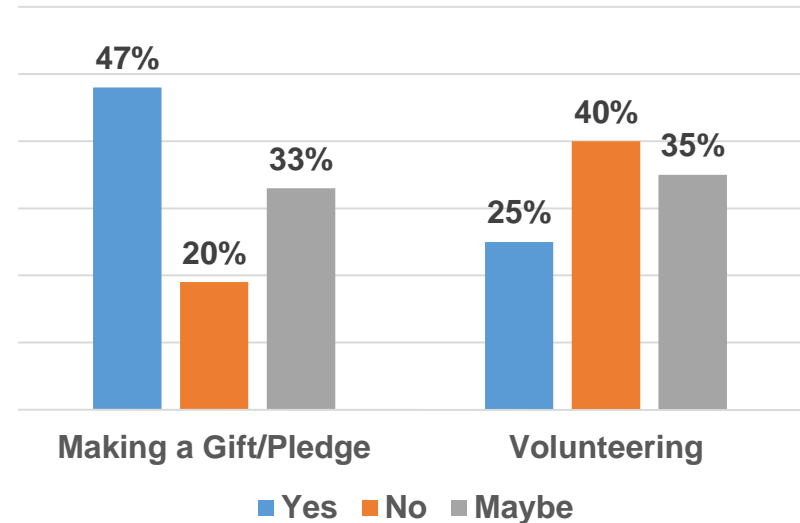


## Willingness to Support a Campaign

Of the 837 individuals who participated in the online survey, 390 indicated they would consider making a gift to the campaign. Seven-hundred and seventeen online survey respondents then indicated the gift level that would be within their capabilities over a five-year period. Seven indications are \$10,000+ and 11 indications are \$5,000 - \$9,999. A majority of indications fall in the range of \$100 - \$599. The total of the 717 indications is \$274,225 to \$780,030.



If the Robert Crown Community Center embarked on a campaign, would you be interested in:





## Observations and Evaluation

## Observations

CCS assessed the potential for a campaign for the Robert Crown Community Center by undertaking a thorough analysis of the key observations from the strategic conversations and the online surveys. Thoughtful analysis of the study findings reveals the following key observations:

### **Outlying leadership gifts will inform the scope of the project and influence the campaign significantly.**

- CCS provided engagement opportunities for 4,900 individuals throughout the course of the study. Of these 4,900 invitees, CCS received 746 indications. While CCS did not uncover gift indications in the 7 or 8-figure range, there is significant upside to campaign potential if such lead gift(s) can be secured. These gifts will influence the overall campaign goal.

### ***Evanston is a vibrant, tight knit community with civic pride that values the Robert Crown Community Center and the services it provides to the community.***

- Ninety-five percent of online survey respondents indicated they feel the programs and services offered at the Robert Crown Community Center are either “highly valuable” or “valuable.” A great proportion of total study respondents indicated they feel the Robert Crown Community Center and its offerings are community assets, but the state of the facility does not reflect the character and culture of Evanston.

### ***A facility renovation has been a long pursued initiative within the community and a significant portion of respondents are willing to help make the vision a reality.***

- If a campaign is to proceed, now is the time. Community support is present, as CCS received 746 gift indications totaling between \$557,525 and \$1,309,078. The 29 total indications from the interview respondents are between \$283,300 and \$529,048. The 717 total indications from the online survey respondents are between \$274,225 - \$780,030. Respondents pointed out discussions around renovating the Robert Crown Community Center have been present for over a decade.



## Observations

***The proposed plan is unique in that the vision is reliant on private, philanthropic investment in a tax-supported entity.***

- Numerous respondents questioned why the community should support the proposed entity beyond their tax contributions. The full funding composition of the initiative, as well as the development of a foundation, will be important to highlight in a campaign. The discussed \$12.5 million combined investment from the City and Evanston Public Library paired with the Robert Crown Community Center's philanthropic roots will offer a foundation for Evanston to continue the legacy of community philanthropy.

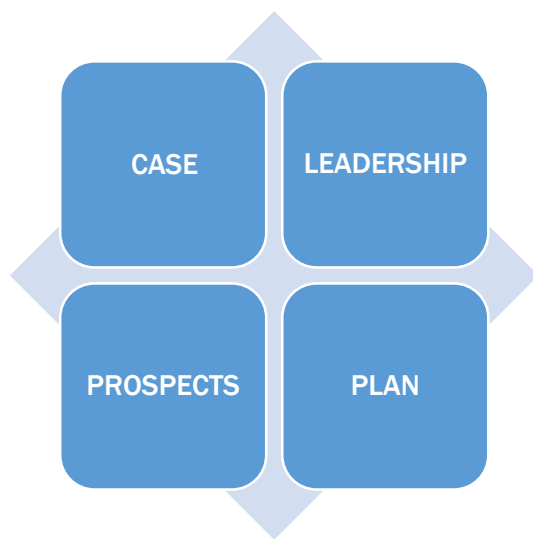
***There is a need to articulate and explain the impact and value of the envisioned Robert Crown Community Center.***

- Seventy-six percent of interview respondents cited the “project/case” as the most important influencer in determining if they will make a gift to a campaign. Forty percent of interview respondents indicated the initiative for the Robert Crown Community Center is positioned “low” in their overall philanthropic priorities. CCS believes prospects' interests could be elevated if the case for support is refined to further explain the community impact of the initiative. Numerous respondents indicated an interest in knowing more detailed user statistics when asked which facility elements should be prioritized. Respondents also consistently wanted to know how the proposed offerings might overlap or compete with other services in the community.



The evaluation of study findings provides the framework for recommendations developed by CCS. The process entails weighing the responses received during the study against what experience shows is necessary for planning a successful campaign.

The findings were used to determine the best course of action for strengthening each of the following elements CCS considers essential for a successful fundraising campaign:



**Case:** *A well-defined and compelling rationale behind the request for financial support*

**Leadership:** *The availability of influential leaders, or trustworthy advocates, who will make an early financial commitment, solicit support from others, as well as give their time for meetings and other campaign-related activities*

**Prospects:** *A sufficient number of prospective donors, or people with an interest in the case or at the very least, a general interest in Robert Crown Community Center and Evanston Public Library and who can be approached for their support*

**Plan:** *An organized and strategic fundraising plan which, when followed carefully, will result in a successful campaign*

**Institutional Readiness:** *The likeliness of a campaign to succeed depends on the combination of the campaign's infrastructure, strength of the case for support, influential leadership, sufficient prospects, and a strategic plan*

## Review: Case

Based on responses received throughout the study, it is CCS's evaluation that the case for improvements to the Robert Crown Community Center, as outlined in the Background Statement, received positive reactions from interviewees. However, a majority of interviewees expressed a desire to understand the need and anticipated impact of the project in greater detail. A comprehensive illustration of how the expansion and improvements will continue to add value to the community is critical. As the City of Evanston moves forward in refining a case for support, it will be important to address the following:

### **Qualify the project as reflective of the character and culture of Evanston by creating a platform for an improved quality of life through the legacy of Evanstonian generosity.**

- When interviewees were asked the strengths of the Robert Crown Community Center, a majority of respondents pointed to its ice rink--the newly envisioned Robert Crown Community Center will be more than a place to go skating. Rather it will represent diversity, civic pride, health and wellness, education, and community opportunities. Evanstonians understand the current value of the Robert Crown Community Center, acknowledge it is well-used and enjoyed by many, but agree it is not a destination facility. A cutting edge facility could help differentiate Evanston from other Northshore communities. The original facility was founded on philanthropy, and the community should aspire to replicate this spirit of altruism.

### **Depict the added value of a library branch to the site of the Robert Crown Community Center, and illustrate why the marriage between the Evanston Public Library and the Parks and Recreation Department makes sense.**

- Some respondents were uncertain of the demand for a library in the area and did not feel the partnership was a natural fit. Leaning on these entities' vision and mission statements for clarification, the partnership will expand community access to public services offered in a collaborative safe space. The partnership will cultivate expanded recreational activities, lifelong learning, and support users' ambitions. The branding of the library should be reflective of its services while differentiating it from other branches. The partnership will provide Evanstonians with convenience through the integration of recreation and learning in one facility-- parents can surf the web while kids play hockey, preschoolers can get a jump start on reading, and after school programs can engage kids through library technology and cutting edge athletic facilities. There is something for everyone at Robert Crown.





## Review: Case

**Explain the urgent need for expanded and improved recreation and athletic facilities, and demonstrate that the project will proceed.**

- Known in the community as a long pursued project for over a decade, respondents indicated the level of urgency is not known. Respondents were skeptical if the initiative will come to fruition. In order to instill confidence in the plans and demonstrate urgency, the City of Evanston should proceed with transparency and detailed communication. The community should be aware of the following:
  - The historical decision making process, including the prior use of focus groups and why the project previously was not carried out. Some respondents were unsure if their current input would be relevant by the time the project moves forward.
  - Statistics on current facility use should be released for the community to better understand the need for the proposed features. Respondents had difficulty determining which case elements should be prioritized without knowing the current demand at the facility, and if there could be overlap with other athletic and/or community centers.
  - The worst case scenario about what will happen to the ice rinks without necessary repairs in the next few years, and how this will impact hockey players, figure skaters, and speed skaters.
  - A statement on financial feasibility with details on facility maintenance funds. Respondents indicated an interest in seeing the specific project construction plans and knowing each feature's associated cost.



## Review: Leadership

The success of a campaign for the Robert Crown Community Center will be dependent on quality, well-respected volunteers with an affinity for the proposal. Identifying influential leaders in the community who are willing to take campaign ownership will be vital in securing widespread support. From the study findings, CCS has identified the following key evaluations related to leadership:

**Compared to traditional fundraising efforts, the Robert Crown Community Center is a unique proposal because it has no existing leadership board.**

- Although the Evanston Public Library and the Parks and Recreation Department both have separate leadership boards, the leaders assembled for the Robert Crown Community Center will be pioneers.

**In order to secure community buy-in and instill confidence that the project is moving ahead, key leadership must extend beyond City leadership and the library board.**

- Many respondents were in agreement that City leadership and the library board should play an active role in the campaign through role modeling gift giving, explaining the case for support, and endorsing the campaign. Respondents felt committed volunteer leadership from the community will be necessary to keep the project on track. The City should take the lead by issuing a statement of project commencement considering the project's history of false starts.



## Review: Leadership

### **Strong leaders with a commitment to volunteerism exist in Evanston.**

- In interviews, 23 names have been mentioned more than once as potential campaign leadership. Of these 23, 10 have been interviewed and 7 of these did not express a willingness to lead. Three indicated they are either willing or might be willing to serve in some leadership capacity. Additionally, 9 of the 10 did indicated they are either willing or might be willing to contribute in some way.
- Twenty-five percent of online respondents are willing to volunteer in some capacity. Although the capacity of these individuals is not known, all levels of volunteerism are necessary to ensure campaign success.



## Review: Prospects and Plan

The Robert Crown Community Center is a broad-based initiative and has the capacity to attract a range of donors for a campaign. Prospective donors include all Evanstonians, local businesses, athletic associations, existing non-profit donors, and philanthropically minded individuals. CCS has identified the following key evaluations related to prospects for the proposed initiative:

### **Great potential exists within the Evanston community.**

- Sixty-five percent of interview respondents and 47% of online survey respondents would give a gift should the campaign move forward. CCS received 746 gift indications totaling between \$557,525 and \$1,309,078. The 29 total indications from the interviewees are between \$283,300 and \$529,048. The 717 total indications from the online survey respondents are between \$274,225 - \$780,030.
- Thirteen interviewees indicated they would consider the amount of a potential gift indication once the case for support is clear, project plans are finalized, and/or campaign leadership is appointed. As evidenced in the study, Evanstonians are an intelligent group of individuals and have detailed questions about the return on investment for this initiative. In order to elevate prospect interest and gain their attention, it will be critical to be armed to answer specific questions about user statistics, project costs, and project plans during a campaign.



## Review: Prospects and Plan

### **There is a strong sense that many yet unidentified prospects exist.**

- CCS was unable to meet with every individual and couple that was indicated as a potential leadership prospect. This means the amount of gift indications could increase significantly during a quiet phase of the campaign, which would elevate the overall goal.
- A majority of interview respondents no longer have a relationship with the Robert Crown Community Center. Although their children once actively used the programs and services offered there and they have reached a position to be able to make a significant gift, the Robert Crown Community Center is not their top philanthropic priority. Many of these interviewees suggested engaging younger Evanstonians with children. Some of these suspect families may have the capacity and interest to make a gift, but have not been presented with the opportunity to make a gift indication yet.

### **A foundation for this initiative needs to be developed and a 501(c)(3) status must be obtained.**

- There is currently no gift receipting framework for the envisioned Robert Crown Community Center. The donor base existing for the Evanston Public Library and the Parks Foundation should be engaged, although historical gift indications demonstrate this donor engagement will not be enough.
  - Evanston Public Library: \$256,977 (2014 fundraising)
  - Parks Foundation: \$150,000 (approximate present balance)

## WealthEngine: Prospect Finder

CCS conducted prospect research through WealthEngine's Prospect Finder. Prospect Finder is a database that allows for targeted prospect identification. It provides comprehensive wealth indicator profiles for each prospect, including information regarding giving history and propensity to give. Through our research, CCS identified 122 unique names with demonstrated philanthropic capacity residing in Evanston.

On November 6, 2015, CCS presented the 122 names to the Planning Committee. Further evaluation found 9 of the 122 prospects have existing relationships with the Evanston Public Library and had not been invited for a strategic conversation. A profile of the research is provided below.

Zip Code	Count of Prospects	Estimated Annual Donations	Count of Prospects	Estimated Gift Capacity Range	Count of Prospects	Net Worth	Count of Prospects
60201	84	\$100K+	9	\$5MM+	4	\$500MM+	2
60202	25	\$50K-\$100K	10	\$1MM - \$5MM	12	\$100MM-\$500MM	5
60203	12	\$25K-\$50K	18	\$500K - \$1MM	27	\$50MM-\$100MM	5
60204	1	\$10K-\$25K	27	\$300K - \$500K	79	\$25MM-\$50MM	5
		\$5K-\$10K	35			\$10MM-\$25MM	26
		\$1K-\$5K	23			\$5MM-\$10MM	56
						\$1MM-\$5MM	21
						\$500K-\$1MM	2
<b>Grand Total</b>	<b>122</b>	<b>Grand Total</b>	<b>122</b>	<b>Grand Total</b>	<b>122</b>	<b>Grand Total</b>	<b>122</b>

### WealthEngine Prospect Generator Key

Estimated Annual Donations: the amount of money a prospect gives annually to all nonprofits per year

Estimated Gift Capacity Range: a calculated amount of money a prospect can give to all nonprofits over five years

Net Worth: the difference between total assets and total debt for a household

*Giving Capacity = Income & Age + Stock + Real Estate + Pension + Charitable Giving*

FORMULA DETAILS	Matched Date	Estimate Model	% included in Giving
			Capacity
	Income & Age	Income* (Age-22)*0.1	10%
	Stock	(Holdings*Current Value)+Values of Sales Transactions	10%
	Real Estate	Low End Range of Property*Escalator	5%
	Pension	100% Plan Assets*(0.75)*5	5%
	Charitable Giving	100% Philanthropic Gifts	100%



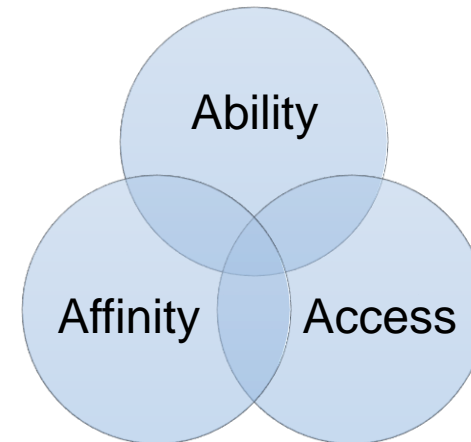
Fundraising • Development Services • Strategic Consulting

## Review: Prospects and Plan

Without a history of a donor base for this specific initiative, unknown prospects, or individuals without a present affiliation to the initiative, must be uncovered. To determine the highest quality prospects, CCS recommends answering the following questions:

- Does this individual, couple, foundation, or business have the **ability**, or wealth capacity, to make a gift?
- Does this individual, couple, foundation, or business have the **affinity**, or relationship, with the Robert Crown Community Center, Evanston Public Library, the Parks and Recreation Department, and/or Evanston?
- Does campaign leadership have **access**, or a connection, to this individual, couple, foundation, or business?

### Qualifying Prospects



## Philanthropic Landscape of Evanston, Illinois

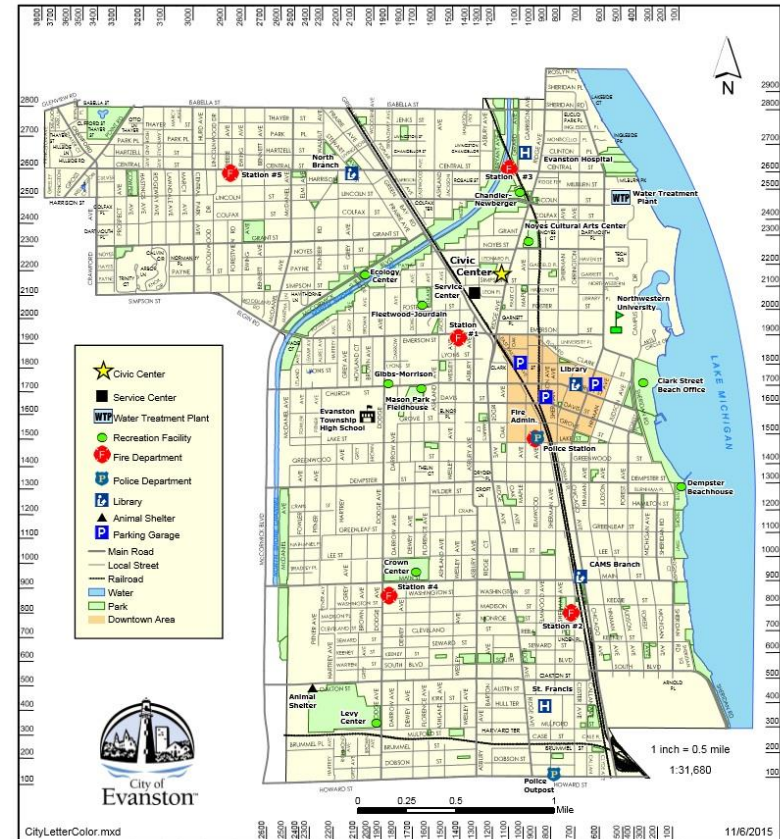
### Regional Profile and Baseline Statistics

Evanston is a suburban North Shore community in Cook County located 13 miles north of downtown Chicago, bordered by Wilmette, Skokie and Lake Michigan.

	Evanston	Illinois
Population, 2010	74,486	12,830,632
Households, 2009-2013	29,016	4,772,723
Land area	7.78 sq miles	55,518.93 sq miles
Median household income, 2009-2013	\$67,038	\$56,797
Median value of owner-occupied housing units, 2009-2013	\$353,200	\$182,300
Per capita money income in past 12 month, 2009-2013	\$41,284	\$29,666
Firms	9,259	1,123,817

Source: Census (2010)  
cityofevanston.org

### The City of Evanston

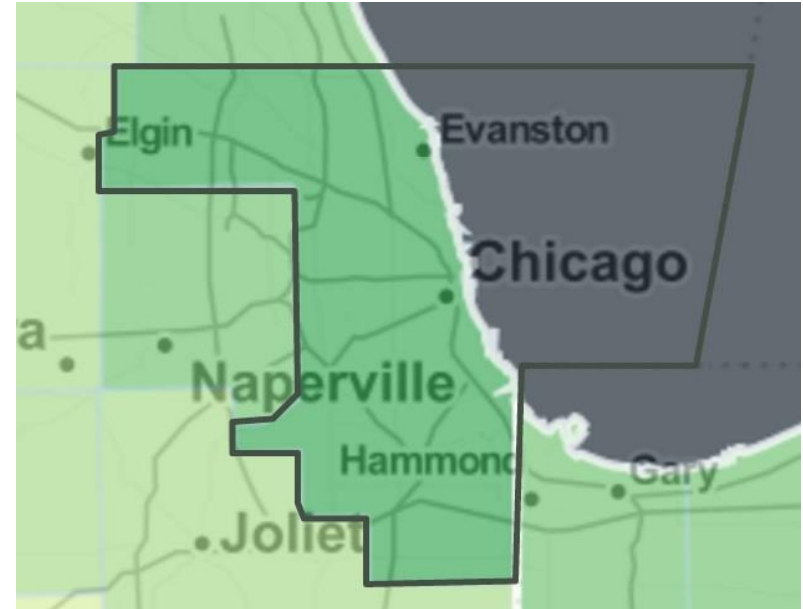


This map is provided "as is" without warranties of any kind. See [www.cityofevanston.org/mapdisc/claimers.html](http://www.cityofevanston.org/mapdisc/claimers.html) for more information.



## Nonprofit Landscape

Regional Nonprofit Sector		
	Cook County	Illinois
Total registered nonprofits	26,992	65,282
Number of nonprofits filing Form 990	12,574	27,116
Revenue of registered nonprofits	\$60,220,651,837	\$107,026,091,768
Assets of registered nonprofits	\$171,434,473,956	\$287,151,493,376



Source: National Center for Charitable Statistics, Regional Report Builder

## Charitable Foundation Landscape

Evanston is home to 74 charitable foundations. Of these 74 foundations, 18 do not accept unsolicited applications.

The combined total giving from these 74 charitable foundations, as listed on their most recently published tax filing, is \$22,609,000. (Last reported years include 2015, 2014, 2013, 2012, and 2007.)

Of these 74 charitable foundations, five of them gave over \$1 million.

1. The Rotary Foundation of Rotary International
2. Cradle Foundation
3. New Prospect Foundation
4. Sigma Chi Foundation
5. Lewis-Sebring Family Foundation

Of these 74 charitable foundations, some grant funds to specific categories.

Category Funded	Number of Foundations Granting Funds
Sports and Recreation	4
Community Development	18
Arts and Culture	25
Health	25
Education	38

Sources: Foundation Search  
 Milliondollarlist.org  
 National Center for Charitable Statistics, Regional Report Builder

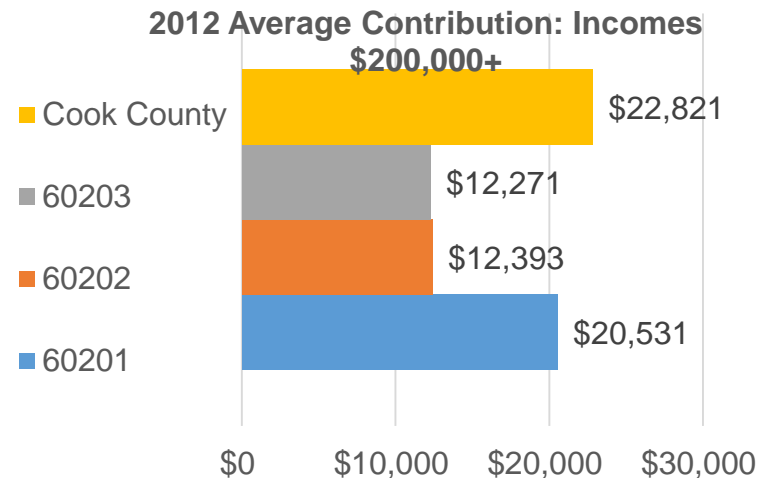
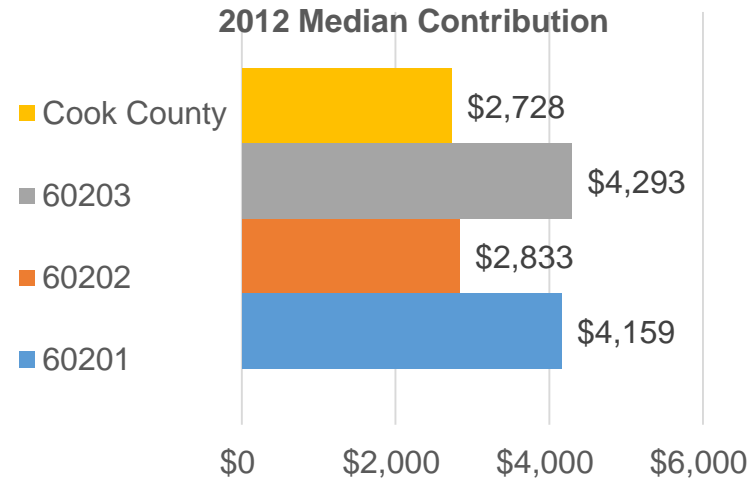
Top 20 Evanston Charitable Foundations				
Foundation	Year	Total Giving	Income	Assets
THE ROTARY FOUNDATION OF ROTARY INTERNATIONAL	2014	\$7,013,000	\$1,128,350,746	\$1,038,075,482
CRADLE FOUNDATION	2014	\$3,050,000	\$12,852,583	\$17,235,773
NEW PROSPECT FOUNDATION	2013	\$2,274,000	\$663,135	\$59,720
SIGMA CHI FOUNDATION	2014	\$1,335,000	\$11,127,580	\$23,400,096
LEWIS-SEBRING FAMILY FOUNDATION	2014	\$1,279,000	\$1,531,640	\$8,721,400
EVANSTON COMMUNITY FOUNDATION INC	2013	\$991,000	\$3,852,522	\$19,320,311
LOTUS FOUNDATION	2013	\$821,000	\$1,631,249	\$3,071,433
REINHARDT H. & SHIRLEY R. JAHN FOUNDATION TRUST	2014	\$785,000	\$2,578,636	\$5,621,265
INNOVATIONS FOR LEARNING INC	2013	\$637,000	\$4,501,186	\$814,827
ANNE AND HOWARD GOTTLIEB FAMILY FOUNDATION	2013	\$578,000		\$22,103
AVI SHAKED AND BABS WALDMAN FAMILY FOUNDATION INC	2014	\$413,000	\$200,073	\$46,853
REINHARDT H & SHIRLEY R JAHN FOUNDATION	2014	\$321,000	\$1,236,276	\$1,509,347
NEW HORIZON FOUNDATION	2013	\$275,000	\$4,250,469	\$3,662,881
HOWARD AND URSULA DUBIN FOUNDATION	2014	\$268,000	\$531,528	\$5,891,942
MUSIC INSTITUTE OF CHICAGO	2014	\$260,000	\$7,037,598	\$11,011,212
THE LEHMAN-STAMM FAMILY FUND	2013	\$236,000	\$147,500	\$2,297,472
EVANSTON TOWNSHIP HIGH SCHOOL DISTRICT 202 EDUC FOUNDATION	2014	\$212,000	\$1,194,957	\$3,718,558
KELLCIE FUND	2013	\$208,000	\$558,712	\$2,609,865
NEW DIRECTIONS FOUNDATION	2013	\$175,000	\$1,131,298	\$4,977,030
THE POTTER'S CLAY FOUNDATION	2014	\$141,000	\$445,059	\$1,725,044

## Individual Landscape

A total of 14 residents in the combined areas of Chicago, Winnetka, and Oakbrook were included on the 2015 Forbes 400 list of the country’s wealthiest billionaires.

### 2012 Giving Profiles from The Chronicle of Philanthropy

<p><b>60201 Zip Code</b></p> <ul style="list-style-type: none"> <li>Population: 42,197 people</li> <li>Median Adjusted Gross Income: \$131,151</li> <li>For Incomes of \$200,000 or more- Giving Ratio: 3.20%</li> <li>Average Contribution: \$20,531</li> </ul>
<p><b>60202 Zip Code</b></p> <ul style="list-style-type: none"> <li>Population: 32,422 people</li> <li>Median Adjusted Gross Income: \$94,027</li> <li>For Incomes of \$200,000 or more- Giving Ratio: 2.34%</li> <li>Average Contribution: \$12,393</li> </ul>
<p><b>60203 Zip Code</b></p> <ul style="list-style-type: none"> <li>Population: 4,760 people</li> <li>Median Adjusted Gross Income: \$125,326</li> <li>For Incomes of \$200,000 or more- Giving Ratio: 2.56%</li> <li>Average Contribution: \$12,271</li> </ul>
<p><b>Cook County</b></p> <ul style="list-style-type: none"> <li>Population: 5,197,677 people</li> <li>Median Adjusted Gross Income: \$81,178</li> <li>For Incomes of \$200,000 or more- Giving Ratio: 3.20%</li> <li>Average Contribution: \$22,821</li> </ul>



Sources: Chronicle of Philanthropy, How America Gives Forbes

## Million Dollar Giving Landscape

Million Dollar Giving from Evanston, Published 2012-2013

Donation	Donor	Recipient	Date
\$21.49 Million	Rotary Foundation of Rotary International	UNICEF	2013
\$1.8 Million	NorthShore University Health System	Erie Family Health Clinic	2012

More million dollar philanthropic contributions are made to Evanston organizations than are given from Evanston organizations. All but one seven-figure donation to Evanston published from 2012-2013 on the Million Dollar List was received by Northwestern University.

An overview of more current high capacity philanthropy in Evanston follows.

Million Dollar Giving to Evanston, Published 2012-2013

Donation	Donor	Recipient	Date
\$50 Million	Bill & Melinda Gates Foundation	Rotary International	2012
\$25 Million	Neil Bluhm	Northwestern	2013
\$17 Million	James Russell	Northwestern	2013
\$15 Million	J Landis & Sharon Martin	Northwestern	2013
\$10 Million	Walter and Lucienne Driskill Foundation	Feinberg School of Medicine	2012
\$10 Million	Querrey Simpson Charitable Foundation	Northwestern	2012
\$10 Million	J Landis & Sharon Martin	Northwestern	2013
\$5.25 Million	Herbert & Anne Gullquist	Northwestern	2013
\$5 Million	Kirkland & Ellis, LLP	Northwestern	2012
\$5 Million	Roxelyn & Richard Pepper	Northwestern	2013
\$2.5 Million	Andrew W Mellon Foundation	Northwestern	2013
\$2.5 Million	Andrew W Mellon Foundation	Northwestern	2013
\$1 Million	W M Keck Foundation	Northwestern	2012

## Campaign Landscape

The following chart outlines the landscape of some campaigns in Evanston. An ambitious \$17.5 million community-supported campaign would surpass any recent effort outside of Northwestern University.

Evanston Campaigns	Goal	Amount Raised
Evanston Art Center • Launched July 2014	\$2,500,000	\$2,080,107+
Evanston History Center • Launched Summer 2010 • Public phase August 2010	\$4,000,000	\$2,400,000+
Youth & Opportunity United (Y.O.U.) • Launched 2013 • Public phase began October 2015 • Ends June 2016	\$15,000,000	\$12,800,000+
Northlight Theatre • Early, formative stages • \$37,000,000 needed	-	-
First United Methodist Church of Evanston • Launched April 2015 • Three-year pledges	\$2,000,000	unknown
YMCA • Early, formative stages	-	-
North Shore Country Day School • Annual giving campaigns	\$1,300,000 for 2015/2016	\$1,285,000 raised for 2014/2015
St. Luke's Episcopal Church • Three-year pledges	\$1,800,000	unknown
Northwestern University • \$1.52 billion secured at March 2014 public campaign announcement	\$3,750,000,000	\$2,200,000,000+



## Recent Evanston Philanthropy Headlines

<p><b>Evanston Community Foundation</b> Raised \$335,000 at annual gala on Oct. 8 (300 supporters)</p>	<p><b>Y.O.U.</b> Raised 85% of \$15 million campaign goal in two years of private fundraising; Over \$2.65 million contributed by the Board of Directors</p>
<p><b>Evanston History Center</b> \$100,000 received from the Tawani Foundation; named gifts for Carol Coolidge Albertson, Frank B. Foster, William Onderdonk, and Virginia Noyes</p>	<p><b>YWCA Evanston/North Shore</b> Raised \$327,043 in the month of October for Allstate Foundation's Purple Purse Challenge in support of domestic violence services</p>
<p><b>Evanston Township High School</b> Renovated Planetarium: Leonard Schaeffer contributed \$500,000 Advanced Manufacturing Lab: ETHS Educational Foundation spearheaded a fundraising effort in 2014 generating over \$450,000</p>	
<p><b>Northwestern University's We Will Campaign Athletic Center Gifts</b> Ryan Fieldhouse in honor of the gift made by alumni Patrick G. and Shirley W. Ryan Wilson Field in honor of the \$15 million gift from alumni Stephen R. and Susan K. Wilson Walter Athletics Center in honor of the \$40 million gift from alumni Mark and Kimbra Walter Kimberly K. Querry and Louis A. Simpson Wing in the Walter Athletics Center in honor of their \$23 million gift Mitchell and Valerie Slotnick Family Atrium in honor of their \$5 million gift</p> <p><b>Other Gifts</b> Roberta Buffett Institute for Global Studies in honor of alumna Roberta Buffett's \$100 million gift Louis A. Simpson and Kimberly K. Querrey Institute for BioNanotechnology in Medicine in honor of their total contribution of \$117.8 million Northwestern Pritzker School of Law in honor of J.B. and M.K. Pritzker's \$100 million gift to Northwestern law school Holly and John Madigan made a major gift to The Campaign for the Future of the Daily Northwestern- the campaign's target goal was raised to \$2 million after reaching \$1.25 million.</p> <p><b>Catalyzer, online fundraising initiative for Northwestern</b> Added seven new campaigns for student groups as a part of the \$3.75 billion We Will Campaign</p>	

Sources: *The Daily Northwestern*  
*Evanston Roundtable*  
*Evanston Now*

## **What does this philanthropic landscape mean for Evanston and the Robert Crown Community Center initiative?**

Evanston is a highly generous community with philanthropic competition. In addition, the close proximity to Chicago, just 13 miles south, opens up a wealth of additional opportunities for Evanstonians to become donors outside of Evanston. All nonprofits in Cook County need the generosity of Evanstonians and some rely on annual support.

Considering the present philanthropic landscape, it will be critical to create customized asks to individuals based on their passions, giving histories, and relationships to the initiative. The future envisioned for the Robert Crown Community Center, a partnership between the Evanston Public Library and the Parks and Recreation Department, has a compelling case for supporting local youth development and enriching the culture and community of Evanston. Identifying leadership prospects with affinity for the project, access to larger networks, and the ability to make significant gifts will be key early on in a community-supported campaign.





## Recommendations



## Recommendations Summary

Based on our analysis, conversations, and feedback from the 57 strategic conversations and online surveys, CCS recommends that the City of Evanston advance with a comprehensive campaign. We recommend the following actions steps be implemented to guide fundraising activity moving forward:

1. Approach Top Prospects and Allow Gift Indications to Inform the Project Scope
2. Move Forward with a Campaign with a Working Goal of \$3 to 5 Million Beyond a Lead Donor Gift and City Investment
3. Focus the Case for Support on Community Impact
4. Utilize a Phased Approach that is Targeted and Tailored- Top Down and Inside Out
5. Develop a Campaign Plan with a 12 to 24 Month Timeline and Activity Benchmarks
6. Recruit Campaign Leadership to Commence Planning
7. Establish and Follow a Disciplined Prospect Engagement Process
8. Provide Options for Donor Recognition through Naming Opportunities
9. Develop an Internal Campaign Infrastructure
10. Resource and Staff Campaign Properly



## 1. Approach Top Prospects and Allow Gift Indications to Inform the Project Scope

Knowledge of the top prospects' engagement will help set the pace for the campaign. CCS advises developing a tailored strategy for approaching all top prospects. This plan of action should include the presentation of final project plans and specific gift range requests with corresponding naming opportunities.

CCS advises prioritizing the determination of the project scope, or mapping out the construction plans and total project costs. Defining the project plan for the Robert Crown Community Center with its associated costs will provide clarity and direction for developing campaign goals and tasks. In addition, a clearly defined project scope will set expectations and outline the parameters of the project. Engagements with prospective donors and key community stakeholders will be more successful with a clearly articulated plan demonstrating project outcomes. CCS recommends evaluating the following questions when finalizing the project scope:

- Is the project plan realistic considering current community support?
- Are the construction details specific and logical given the facility's intended use?
- Do the selected facility components meet the needs of Evanstonians?
- Does the chosen project have the necessary infrastructure in place to come to completion?
- Will key stakeholders agree on the terms of the project scope?



## **2. Move Forward with a Campaign with a Working Goal of \$3 to \$5 Million Beyond a Lead Donor Gift and City Investment**

The Robert Crown Community Center, as a partnership between the Evanston Public Library and the Evanston Parks and Recreation Department, demonstrated potential for a successful campaign; however, CCS did not receive the number of leadership gift indications necessary to justify a \$17.5 million campaign for private investment. During the study, no seven-figure indications were received. Based on the gift indications received and the findings from the study, CCS recommends a 12 to 24 month campaign with a working target of \$3 to \$5 million beyond a lead donor gift and the City's discussed investment.

The initial focus of the campaign should be placed on select donors who have made the largest indications during the study, as well as have the capacity and historical record to consider gifts of \$25,000 and above. Feasibility in surpassing the goal will require donor generosity, likely fueled by project affinity, at both the high five-figure and six-figure level. A public goal should not be announced until the returns on leadership gift efforts are known.



### 3. Focus the Case for Support on Potential Community Impact

The Planning and Advisory Committees provided valuable information for use in the Background Statement and Viewbook. During the strategic conversations, it was evident that interviewees were not certain of the urgency of the initiative. A refined, compelling case will provide prospects with the information necessary to determine their support of the project. CCS recommends the City of Evanston work to focus the case for support on the potential community impact of the Robert Crown Community Center.

The case should utilize user data from Evanston Public Library, the Parks and Recreation Department, and user groups, such as athletic associations, to support the need for investment. The narrative should maintain a thematic focus on providing Evanstonians with top-of-the-line programs and services. Additionally, it should demonstrate the impact of the case elements now and into the future.

CCS recommends a comprehensive case for support that articulates:

- A clear campaign theme rooted in the Robert Crown Community Center's founding based on philanthropy and the facility's impact for Evanstonians over the past forty years
- The specific need for additional facility features to accommodate user growth and demand
- A statement of urgency as it relates to the necessary repairs and renovations
- An outline of the decision-making process and other options that were explored historically
- A detailed illustration of the specific plans for the facility
- Explanations on how the facility will be staffed, maintained over time, and funded by the City



A sample of additional considerations for producing a compelling case for support are listed in the chart below:

Case Component		Supporting Detail		
	Why this Need?	Impact	Questions to Answer	Next Steps
Adding a new library branch	<ul style="list-style-type: none"> <li>-Underserved area</li> <li>-Meet shifting demands for technology-based research</li> </ul>	<ul style="list-style-type: none"> <li>-Provides valuable meeting spaces</li> <li>-Facilitates personal and professional development</li> <li>-Provides technology access</li> </ul>	<ul style="list-style-type: none"> <li>-What is the demand?</li> <li>-How does this fit in with the master plan for the library?</li> <li>-How does this affect other branches?</li> </ul>	<ul style="list-style-type: none"> <li>-Solidify construction plans and details</li> <li>-Secure final cost estimates and plans</li> <li>-Determine City bonding</li> </ul>
Increasing the scope of recreation facilities	<ul style="list-style-type: none"> <li>-Provide indoor track for runners to use during inclement weather</li> <li>-Allow for more practice time on the ice</li> <li>-No women's locker room</li> <li>-Convert classrooms into multi-purpose rooms to maximize populations able to be served</li> </ul>	<ul style="list-style-type: none"> <li>-Allows for necessary features essential to user satisfaction</li> <li>-Provides increased opportunities for athletic activities and user practice</li> <li>-Safe, central public space</li> </ul>	<ul style="list-style-type: none"> <li>-What is the demand?</li> <li>-How will the facility be maintained over time?</li> <li>-How will this impact users during construction?</li> <li>-How much will each component cost?</li> </ul>	<ul style="list-style-type: none"> <li>-Solidify construction plans and details</li> <li>-Secure final cost estimates</li> <li>-Determine City bonding</li> </ul>
Expanding current fitness/recreation programming	<ul style="list-style-type: none"> <li>-Expand opportunities available within Evanston</li> </ul>	<ul style="list-style-type: none"> <li>-Increased options to improve health and wellness</li> <li>-Provides additional leisure opportunities locally</li> </ul>	<ul style="list-style-type: none"> <li>-What is the demand?</li> <li>-How will this overlap or complement other community programming?</li> <li>-Who will use this programming?</li> </ul>	<ul style="list-style-type: none"> <li>-Secure final cost estimates and plans</li> <li>-Develop a portfolio of the expanded programming</li> </ul>
Expanding current preschool/after school programming	<ul style="list-style-type: none"> <li>-Strengthen program quality</li> <li>-Provide enhanced opportunities for community youth</li> </ul>	<ul style="list-style-type: none"> <li>-Library access will help prepare youth for school</li> <li>-Increased convenient options for neighborhood families</li> </ul>	<ul style="list-style-type: none"> <li>-What is the demand?</li> <li>-Who will use this programming?</li> <li>-How will it be staffed?</li> </ul>	<ul style="list-style-type: none"> <li>-Secure final cost estimates and plans</li> <li>-Develop a portfolio of the expanded programming</li> </ul>

### 3. Utilize a Phased Approach that is Targeted and Tailored- Top Down and Inside Out

From CCS's experience, campaigns are most successful when conducted in strategic phases. Developing a phased approach over 12 to 24 months for the campaign will build momentum during its early stages. Later on, this approach will provide the opportunity to lean on prior successes to generate additionally productive activity. A phased approach ensures all constituency groups are given the chance to become involved through volunteerism and/or gift giving.

In a phased approach, prospects with the financial capacity and giving history to consider larger gifts are approached initially during a quiet phase. Early, significant leadership gifts are essential for building campaign energy. Leadership gifts will inspire others to evaluate their own giving capacity and create confidence in campaign success. A public phase should be announced during the final six months of the campaign.

Every phase should have a dedicated committee responsible for the gift solicitations to each phase's prospects. In addition, prospects in each phase of the campaign should be provided the opportunity to consider gifts in the form of a pledge, payable over three to five years. A designated pledge period allows donors the opportunity to make larger gifts than they would otherwise be capable of through a one-time donation.

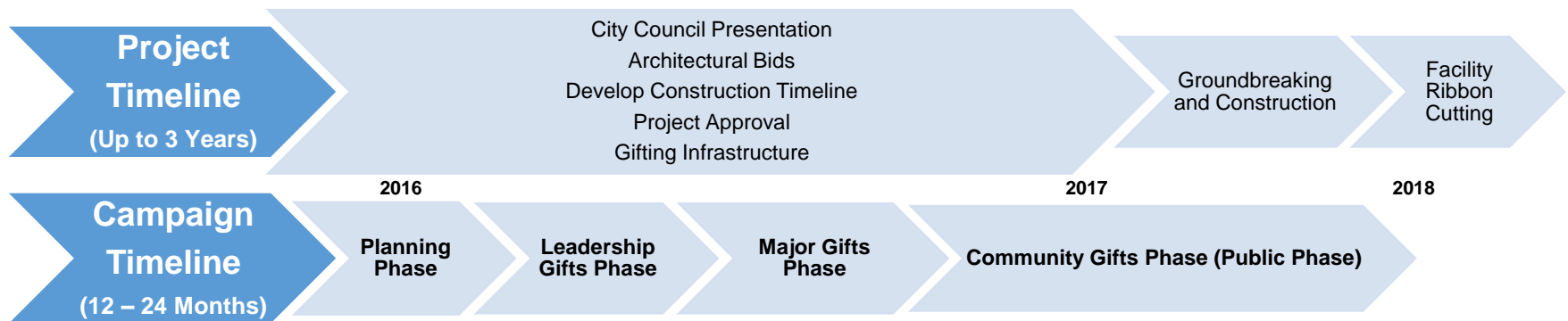
The campaign should use Evanston Public Library and the Park Foundation's existing fundraising strategies, as well as consider new tactics. Effective practices include personal visits, proportionate gift requests, tailored asks, and an emphasis on early leadership gifts to set the pace for the remaining phased solicitation process.

CCS's Recommended Campaign Phases		Months (Overlapped)
1. Planning Phase		6 months
2. Leadership Gifts (\$100,000+)	QUIET PHASES	18 months
3. Major Gifts (\$25,000+)		12 months
4. Community Gifts (below \$5,000)	PUBLIC PHASE	Last 6 months



#### 4. Develop of a Campaign Plan with a 12 to 24 Month Timeline and Activity Benchmarks

CCS recommends that the City of Evanston continue moving forward with the planning phase of a 12 to 24 month campaign effort, building on the momentum created from the feasibility study. Total potential available funds must be considered in advance of embarking on a campaign, as a finalized project scope must be set. An illustrative timeline developed by CCS, subject to change, is presented:



CCS recommends presenting prospects with the option for three to five year pledged gifts. A pledge redemption timeline, subject to change, is presented below.

<b>Leadership Gifts Phase Pledge Redemption Timeline \$1.3 - \$2.2 Million</b>	<b>3 Years Cumulative</b>	1 <sup>st</sup> Year \$433,333- \$733,333	2 <sup>nd</sup> Year \$866,666- \$1,466,666	3 <sup>rd</sup> Year \$1,300,000- \$2,200,000		
	<b>5 Years Cumulative</b>	1 <sup>st</sup> Year \$260,000- \$440,000	2 <sup>nd</sup> Year \$520,000- \$880,000	3 <sup>rd</sup> Year \$780,000- \$1,320,000	4 <sup>th</sup> Year \$1,040,000- \$1,760,000	5 <sup>th</sup> Year \$1,300,000- \$2,200,000

<b>Major Gifts Phase Pledge Redemption Timeline \$1.2 – \$2 Million</b>	<b>3 Years Cumulative</b>	1 <sup>st</sup> Year \$400,000- \$666,666	2 <sup>nd</sup> Year \$800,000- \$1,333,333	3 <sup>rd</sup> Year \$1,200,000- \$2,000,000		
	<b>5 Years Cumulative</b>	1 <sup>st</sup> Year \$240,000- \$400,000	2 <sup>nd</sup> Year \$480,000- \$800,000	3 <sup>rd</sup> Year \$720,000- \$1,200,000	4 <sup>th</sup> Year \$960,000- \$1,600,000	5 <sup>th</sup> Year \$1,200,000- \$2,000,000

<b>Community Gifts Phase Pledge Redemption Timeline \$500,000 - \$800,000</b>	<b>3 Years Cumulative</b>	1 <sup>st</sup> Year \$166,666- \$266,666	2 <sup>nd</sup> Year \$333,333- \$533,333	3 <sup>rd</sup> Year \$500,000- \$800,000		
	<b>5 Years Cumulative</b>	1 <sup>st</sup> Year \$100,000- \$160,000	2 <sup>nd</sup> Year \$200,000- \$320,000	3 <sup>rd</sup> Year \$300,000- \$480,000	4 <sup>th</sup> Year \$400,000- \$640,000	5 <sup>th</sup> Year \$500,000- \$800,000





A phased 12 to 24 month timeline, subject to change, is outlined below.

Timeline/Phase	Campaign Activities	Project Activities	Financial Goal
December – March 2016  <b>Planning Phase</b>	<b>Recruiting &amp; Training</b> <ul style="list-style-type: none"> <li>Develop leadership recruitment plan</li> <li>Identify potential Campaign Leadership</li> <li>Identify and recruit Campaign Executive Cabinet</li> </ul> <b>Operational</b> <ul style="list-style-type: none"> <li>Material Production (refined Background Statement and Viewbook, gift request letter, gift prospectus, thank you letter)</li> </ul>	<ul style="list-style-type: none"> <li>Present study findings at January City Council meeting</li> <li>Request and receive architectural bids</li> <li>Develop construction timeline</li> <li>Receive project approval</li> </ul>	Phase Goal  N/A
	<b>Gift Requests</b> <ul style="list-style-type: none"> <li>Identify and prioritize the top 20 potential donors</li> <li>Prioritize and begin solicitation to top five prospects</li> <li>Continue WealthEngine screenings and in-depth research on prospects</li> </ul> <b>Prospect Identification</b> <ul style="list-style-type: none"> <li>Determine cultivation strategies for Leadership Gifts</li> <li>Develop a calendar of cultivation and stewardship events</li> </ul>		<ul style="list-style-type: none"> <li>Finalize discussions regarding City and Library contributions</li> <li>Solidify gifting infrastructure and obtain 501(c)(3) status for the foundation</li> </ul>

Timeline/Phase	Campaign Activities	Project Activities	Financial Goal
<p>April – December 2016</p> <p><b>Leadership Gift Phase</b></p>	<p>Gift Requests</p> <ul style="list-style-type: none"> <li>• Continue solicitation to top 20 prospects</li> <li>• Rate and prioritize remaining prospects at \$100K+</li> <li>• Develop solicitation strategies for Leadership Gifts</li> <li>• Prepare personalized gift request proposals for each prospect</li> </ul> <p>Prospect Identification and Cultivation</p> <ul style="list-style-type: none"> <li>• Continue to invite prospects to cultivation events, such as briefings and meetings</li> <li>• Host private lunches and dinners with campaign leaders, top donors, and prospects</li> <li>• Tours of the Robert Crown Community Center</li> </ul> <p>Benchmark</p> <ul style="list-style-type: none"> <li>• Reassess final fundraising goal based on receipt of initial ten gifts</li> </ul>	<ul style="list-style-type: none"> <li>• Finalize construction plans</li> <li>• Issue statement of plans</li> </ul>	<p>Phase Goal</p> <p>\$1,300,000</p> <p>-</p> <p>\$2,200,000</p> <p>Total Goal</p> <p>\$1,300,000</p> <p>-</p> <p>\$2,200,000</p>



Timeline/Phase	Campaign Activities	Project Activities	Financial Goal
January – June 2017  <b>Major Gift Phase</b>	<b>Gift Requests</b> <ul style="list-style-type: none"> <li>Continue solicitation of next 50 prospects</li> <li>Rate and prioritize prospects of \$25K+</li> <li>Develop solicitation strategies for Major Gifts</li> <li>Develop solicitation strategies for corporations and foundations</li> <li>Prepare personalized gift request proposals for each prospect</li> </ul>	<ul style="list-style-type: none"> <li>Finalize all financial, legal, and administrative details necessary to move forward with construction</li> </ul>	Phase Goal  \$1,200,000 - \$2,000,000
	<b>Prospect Identification and Cultivation</b> <ul style="list-style-type: none"> <li>Continue to invite prospects to cultivation events, such as briefings and meetings</li> <li>Host private lunches and dinners with campaign leaders, top donors, and prospects</li> <li>Tours of the Robert Crown Community Center</li> </ul>		Total Goal  \$2,500,000 - \$4,200,000

Timeline/Phase	Campaign Activities	Project Activities	Financial Goal
<p>July 2017 – January 2018</p> <p><b>Community Gift Phase (Public Phase)</b></p>	<p><b>Gift Requests</b></p> <ul style="list-style-type: none"> <li>• Continue solicitation of remaining prospects</li> <li>• Rate and prioritize prospects of \$10K or below</li> <li>• Develop solicitation strategies for Public Phase prospects</li> <li>• Prepare personalized gift request proposals for each prospect</li> </ul> <p><b>Prospect Cultivation</b></p> <ul style="list-style-type: none"> <li>• Continue to invite prospects to cultivation events, such as briefings and meetings</li> <li>• Host private lunches and dinners with campaign leaders, top donors, and prospects</li> <li>• Tours of the Robert Crown Community Center</li> </ul> <p><b>Benchmark</b></p> <ul style="list-style-type: none"> <li>• If 75% of total goal raised, announce campaign publicly</li> </ul>	<ul style="list-style-type: none"> <li>• Construction</li> </ul>	<p>Phase Goal</p> <p>\$500,000 - \$800,000</p> <p>Total Goal</p> <p>\$3,000,000 - \$5,000,000</p>



## 5. Recruit Campaign Leadership to Commence Planning

Core campaign volunteers drive success not only through their generosity, but also through their outreach to other donors. In CCS's experience, three factors will affect the ability to recruit strong leadership for the Robert Crown Community Center: a credible statement of need detailing project impact; a well developed campaign plan and the resources needed to implement it; and a series of achievable immediate and long term goals. CCS recommends the current Campaign Planning Committee assist CCS with finalizing the case for support and campaign plan.

CCS's suggested campaign leadership structure is as follows:

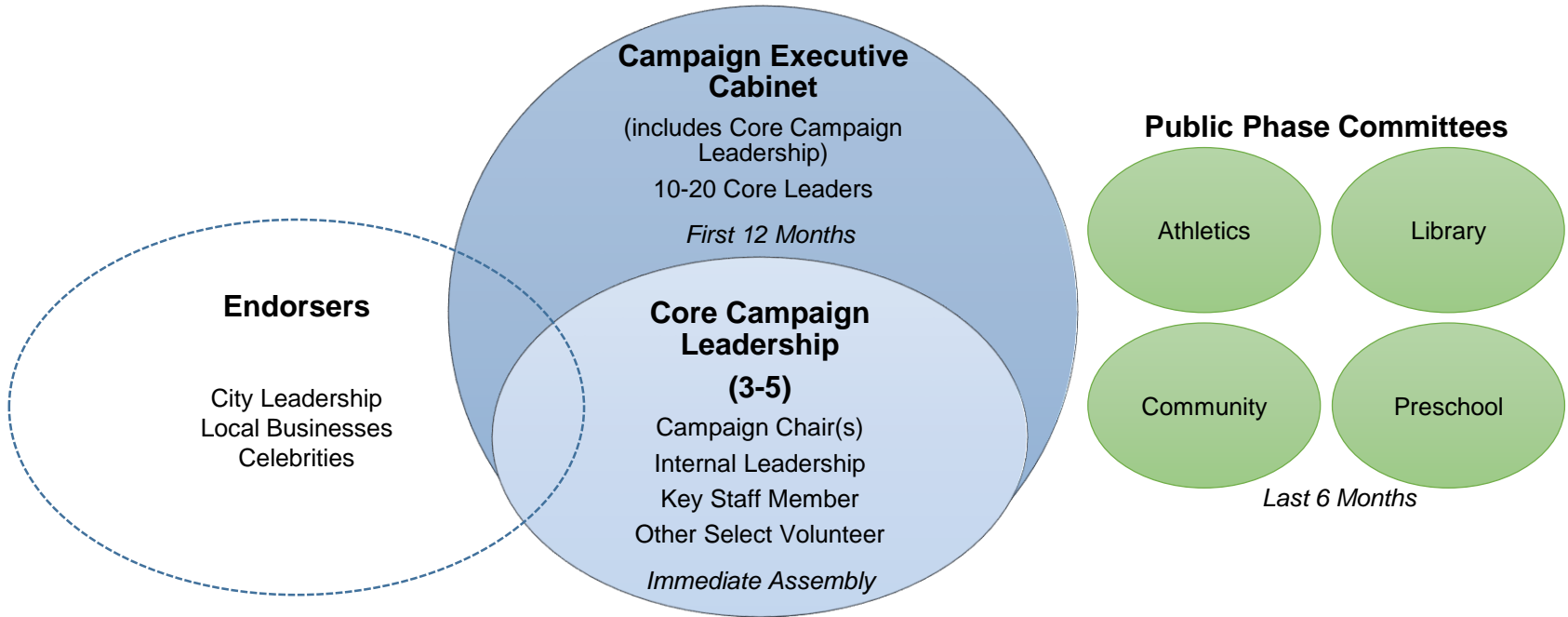
1. To lead the way in the campaign, CCS recommends assembling 3 to 5 **Core Campaign Leadership Chairs**- the central leadership group, or "nerve center," within the Campaign Executive Cabinet. Core Campaign Leaders meet bi-weekly and drive the success of the campaign with support from CCS. Core Campaign Leaders are key prospective donors or other leaders whose guidance is imperative to campaign implementation. These leaders typically make a minimum gift of \$25,000 up to \$100,000+.
2. Develop a **Campaign Executive Cabinet**- a group of credible thought leaders and community influencers reflecting the character and culture of Evanston able to expand the campaign's network and facilitate connections with key prospects. CCS recommends appointing 10 to 20 members over the first year drawn from the Planning and Advisory Committees, institutional leadership, key stakeholders, and prospective top donors. In addition to inspiring confidence, the role of the Campaign Executive Cabinet is to set an example for others through personal financial commitment and volunteerism. These individuals endorse and communicate the case for support and campaign plan, as well as cultivate prospective donors and participate in high-level solicitations.



- 3. Endorsers (as appropriate):** In addition to the Campaign Executive Cabinet, a select number of individuals or organization representatives should be invited to endorse the campaign through customized roles. Without the commitment level of serving on the Campaign Executive Cabinet, this role offers involvement for key stakeholders willing and able to help with engagement opportunities and introductions.
- 4. Public Phase Committees:** During the public phase of the campaign, likely the final six months, a series of volunteer committees should be assembled to engage with specific constituency groups and build donor relations. CCS recommends organizing the committees by affinity or user groups.

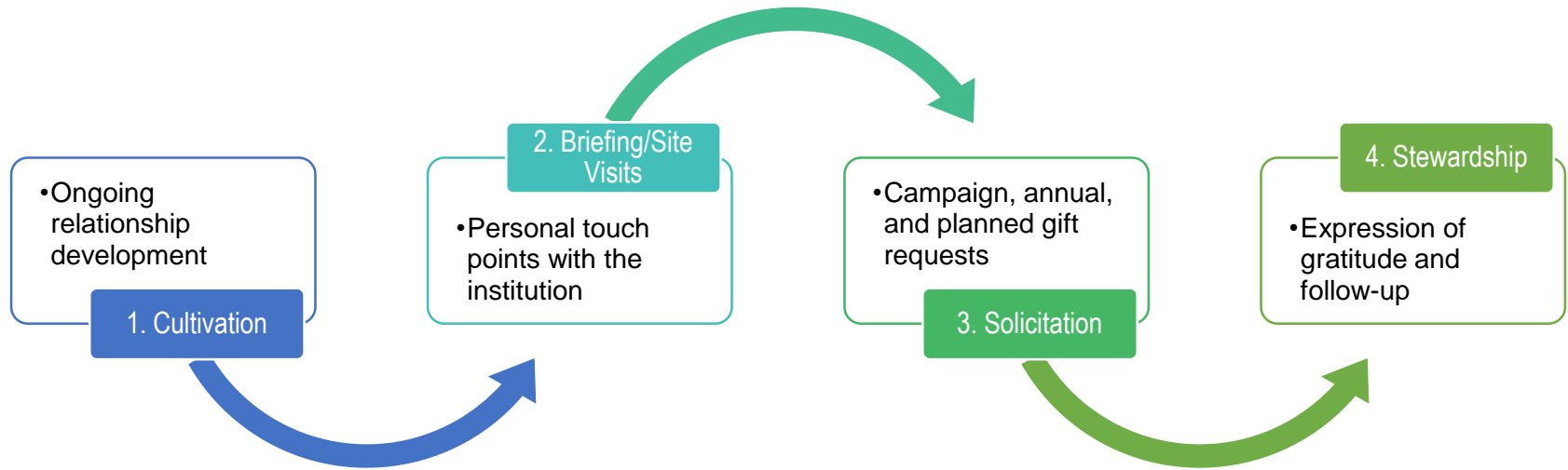


## Recommended Campaign Leadership Structure for the Robert Crown Community Center



## 7. Establish and Follow a Disciplined Prospect Engagement Process

Given the fact that the Robert Crown Community Center has no historical donor base, CCS recommends the City of Evanston devote extraordinary time, leadership, and focused attention to high capacity prospects during the campaign's quiet phase. In order to elevate each prospect's commitment to the vision for the Robert Crown Community Center, CCS recommends the following steps be emphasized during the engagement process.





## 8. Provide Options for Donor Recognition through Naming Opportunities

Ultimately, donors will make a gift to the Robert Crown Community Center because of their affinity for the project; however, offering commemorative or memorial opportunities may add appeal. The feasibility study results conclude 95% of interview respondents believe donors would be interested in recognition opportunities. As outlined below, six-figure commitments are critical to achieving a \$3 to \$5 million community-supported goal. Naming opportunities can help secure larger gifts, as well as persuade donors to stretch their gift amount if the capacity is present. The aspects of each opportunity should be customized to ensure donor satisfaction. An annotated table of gifts, which includes suggested naming opportunities, is available in the appendix.

**Table of Gifts for a \$3 Million Community-Supported Campaign for the Robert Crown Community Center**

Gift Level	# of Gifts Needed	Typical # of Prospects Needed	# of Low-End Indications Identified	Total at Gift Level	Cumulative Amount
\$500,000	1	3		\$500,000	\$500,000
\$250,000	2	6		\$500,000	\$1,000,000
\$100,000	9	21	1	\$900,000	\$1,900,000
\$50,000	10	21	1	\$500,000	\$2,400,000
\$25,000	14	30		\$350,000	\$2,750,000
\$10,000	25	75	14	\$250,000	\$3,000,000
Below \$10,000	Many	400 +	730		
<b>TOTAL</b>			<b>746</b>	<b>\$3,000,000</b>	<b>\$3,000,000</b>



**Table of Gifts for a \$5 Million Community-Supported Campaign Goal for the Robert Crown Community Center**

<b>Gift Level</b>	<b># of Gifts Needed</b>	<b>Typical # of Prospects Needed</b>	<b># of High-End Indications Identified</b>	<b>Total at Gift Level</b>	<b>Cumulative Amount</b>
\$500,000	3	9		\$1,500,000	\$1,500,000
\$250,000	4	12		\$1,000,000	\$2,500,000
\$100,000	11	33	2	\$1,100,000	\$3,600,000
\$50,000	12	36	2	\$600,000	\$4,200,000
\$25,000	20	60	2	\$500,000	\$4,700,000
\$10,000	30	90	13	\$300,000	\$5,000,000
Below \$10,000	Many	400 +	727		
<b>TOTAL</b>			<b>746</b>	<b>\$5,000,000</b>	<b>\$5,000,000</b>



## 9. Develop an Internal Campaign Infrastructure

The vision for the Robert Crown Community is a novel concept, as it involves a physical and financial partnership between the Evanston Public Library and the Parks and Recreation Department. Although both partners have their own gift receipting frameworks, a collaborative campaign will bring in significant gifts beyond the present capabilities of each entity.

To efficiently manage gift processing and provide transparency to donors, CCS recommends the City of Evanston move forward with their initial efforts to develop a separate foundation. Separate accounts for restricted gifts advised by donors, such as the library, should be considered as a way to further attract prospects with specific giving interests.

Consultation is advised in the formation of the campaign infrastructure with the following:

- Library Board Members
- Parks and Recreation Department Board Members
- Volunteer Parks Foundation Leaders
- Legal Team
- Bank Trust Department

After an entity is developed for gift receipting with a 501(c)(3) status and a bank account is allocated for funds, it will be critical to train volunteers and/or allocate staff to manage its administration. Trained volunteers and/or staff will need to adhere to any donor-imposed restrictions. An organizational chart should be built to map out the relationship between each foundation, their staffing, and any overlap with the newly formed foundation. A designated staff member will need to be responsible for the following:

- Writing and mailing donor acknowledgement letters, which serve as contribution receipts. These letters must include a description of the donation, its value, and whether or not goods or services were received in exchange.
- Processing gifts. Donations may be received in the form of cash, check, or credit card. Employer matching gifts, three to five year pledges, stock contributions, and restricted gifts will require specialized follow through.



## 10. Resource and Staff Campaign Properly

CCS recommends the City of Evanston allocate adequate financial and staffing resources for the campaign appropriate for the need. The execution of a successful campaign depends on professional planning and management.

### Resource

The fundraising endeavor will require appropriate investment. A budget of 8% - 10% of the campaign goal is an appropriate aim. A campaign budget should include the costs for:

- Staff resources
- Leadership, staff, and volunteer training
- Campaign material design and printing
- Donor cultivation events
- Fundraising counsel



## Staff

A campaign will be the most effective with a dedicated full-time fundraising staff member able to provide the attention necessary to propel the campaign forward. If a full-time staff member is not assigned to the project, CCS advises the equivalent hours of a full-time staff member be spread out among existing staff. CCS's suggested staffing structure is as follows:

1. Select one individual to lead and coordinate the initiative
2. Allocate administrative staff support to the campaign
3. Arrange time for City leadership to attend campaign-related meetings, briefings, and prospect engagements
4. Allow full-time fundraising staff to guide and implement overall campaign efforts

A thorough, well-developed campaign will require staff leadership to carry out the following:

- Conduct the campaign efficiently
- Refine the case for support
- Carry out the initial development of the campaign plan for 12 to 24 months with activity benchmarks
- Identify, recruit, and train leadership
- Develop cultivation strategies for prospects and customize solicitation materials
- Produce campaign materials, such as pledge cards, giving policies, solicitation scripts, pledge redemption procedures, thank you letters, etc.

CCS would be delighted to serve as the City of Evanston's counsel on this initiative.



## Priority Action Steps

Based on the observations, evaluations, and recommendations included in this report, the City of Evanston should immediately move forward with campaign planning.

- CCS will present the findings of the feasibility study at the City Council meeting in January 2016

Pending the City of Evanston's decision to move forward with a \$3 to \$5 million community-supported campaign, CCS recommends prioritizing the following tasks:

- Moving forward with efforts to secure lead donor gifts
- Determining the project scope
- Creating a project timeline
- Developing a gifting infrastructure

The continuation of CCS's services will consist of a staff member able to move forward with crafting a refined case for support, identifying leadership, establishing a detailed campaign plan, and prioritizing and expanding the top prospect list.



## Appendix

Detailed Statistics

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Study Materials

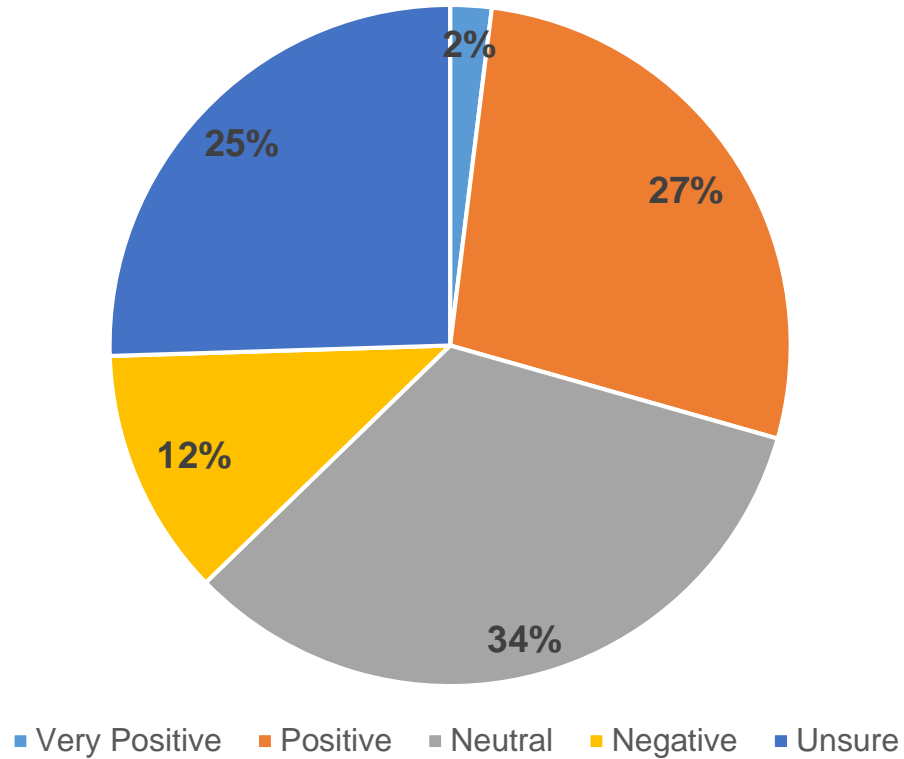
- Interview Request Letter
- Background Statement
- Viewbook
- Table of Gifts

Proposed Naming Opportunities Framework



## Detailed Strategic Conversation Statistics

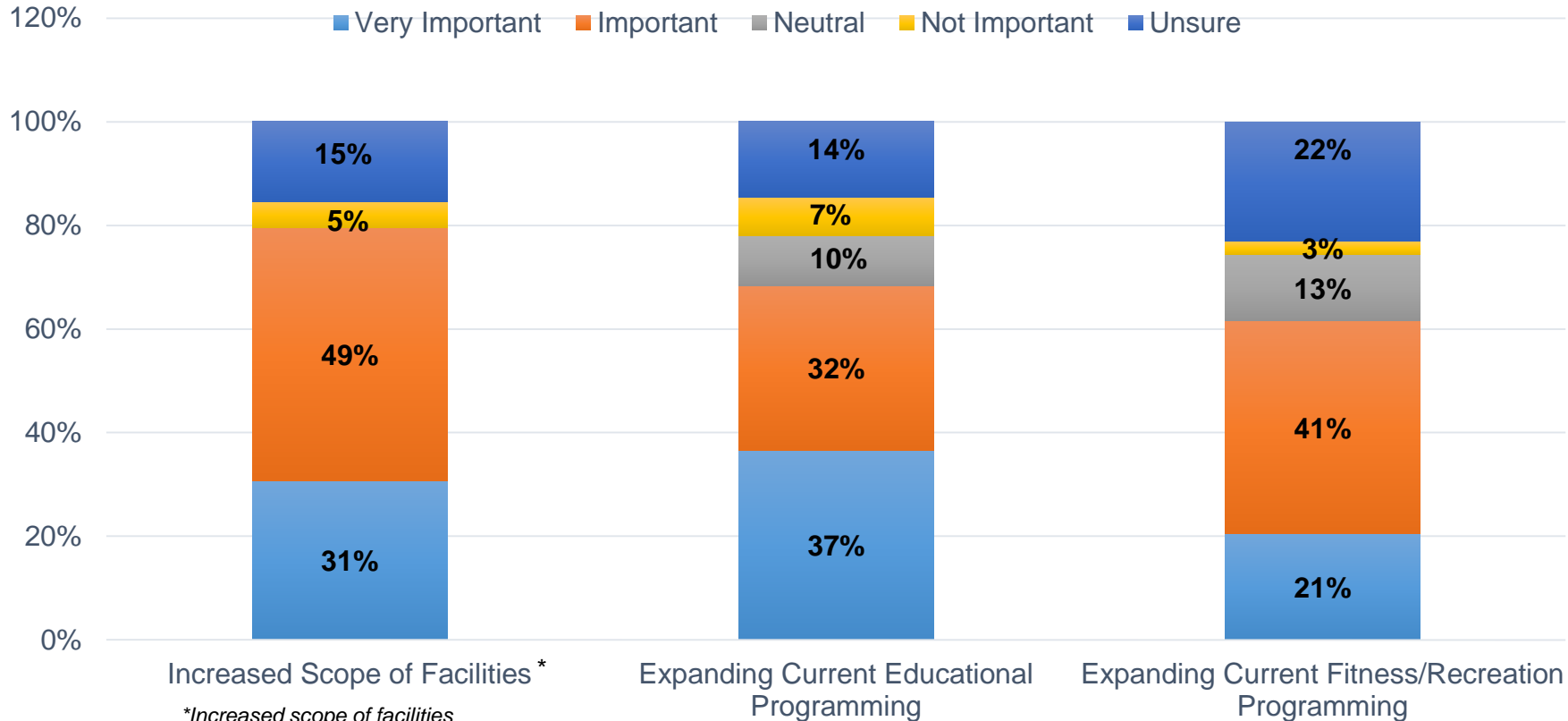
What do you believe the community's perception of the Robert Crown Community Center to be?





## Detailed Strategic Conversation Statistics

Please evaluate the importance of each aspect:



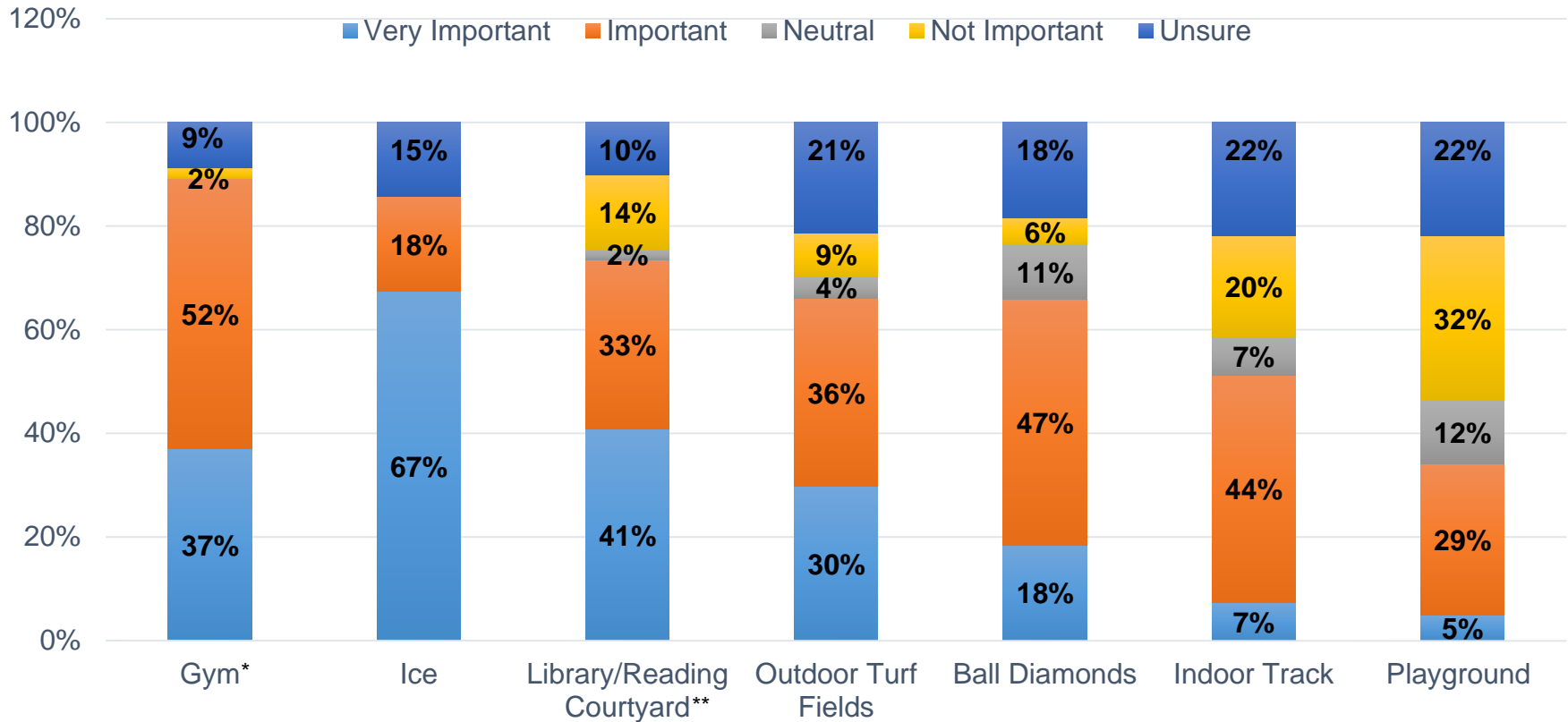
Increased Scope of Facilities \*

*\*Increased scope of facilities is defined as expanding overall square footage to allow for a library with a reading courtyard, athletic spaces, educational rooms, offices, bathrooms, locker rooms, storage, etc.*



### Detailed Strategic Conversation Statistics

Please evaluate the importance of each aspect:

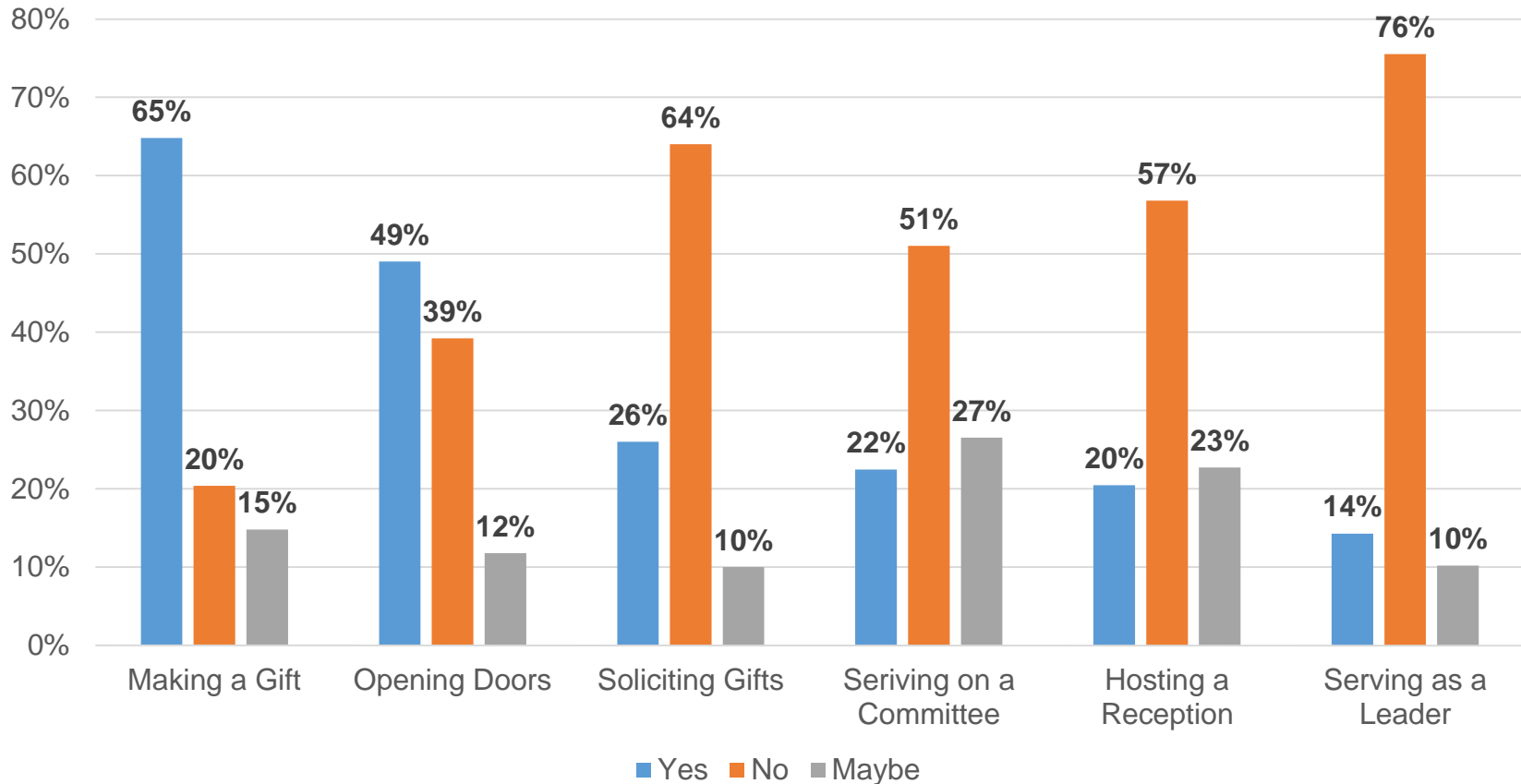


\*Gym is defined as a multipurpose indoor space for basketball, volleyball, soccer, taekwondo, gymnastics, etc.

\*\*Percentages represent respondents' prioritization of the library only, and are not inclusive of a response to a reading courtyard.

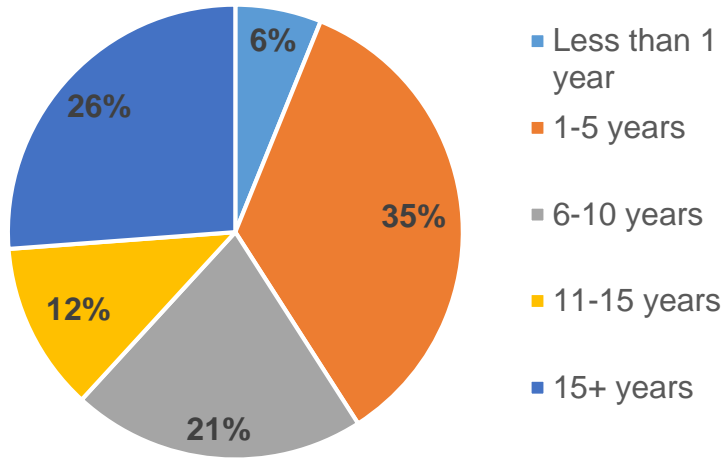
## Detailed Strategic Conversation Statistics

In a campaign, would you be willing to consider:

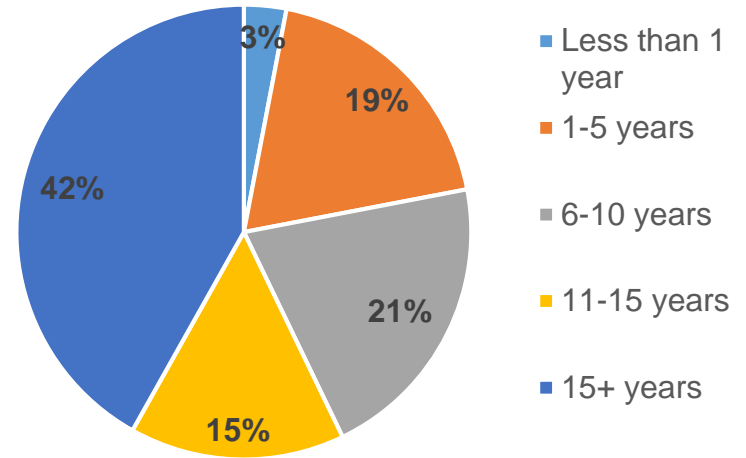


## Detailed Online Survey Statistics

When did you begin your involvement with the Robert Crown Community Center?

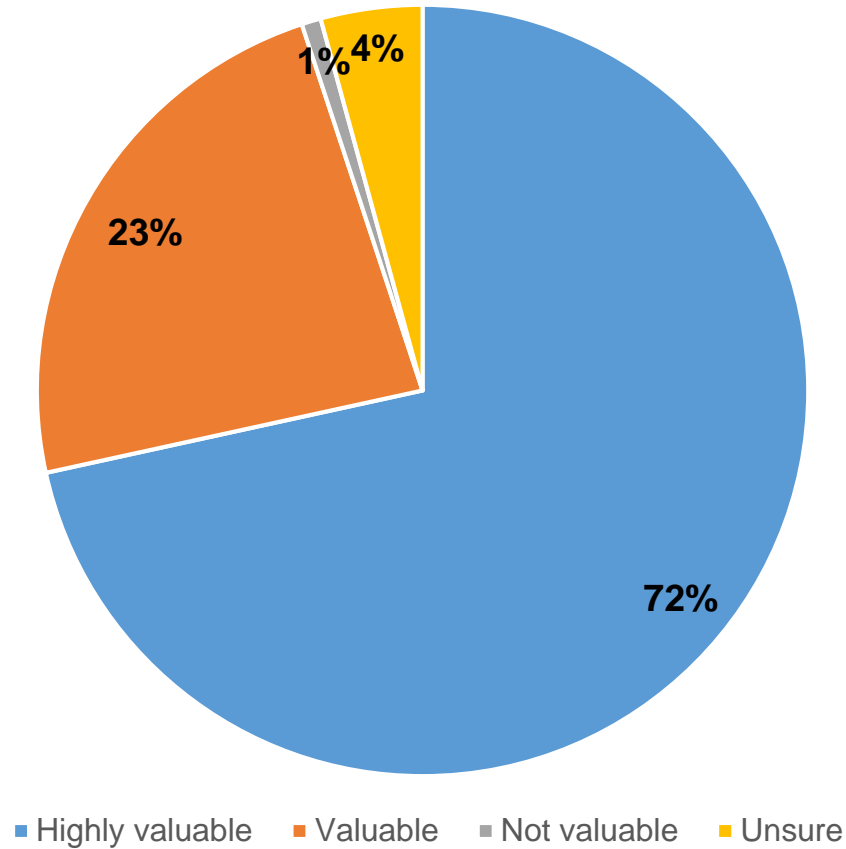


When did you begin your involvement with the Evanston Public Library?

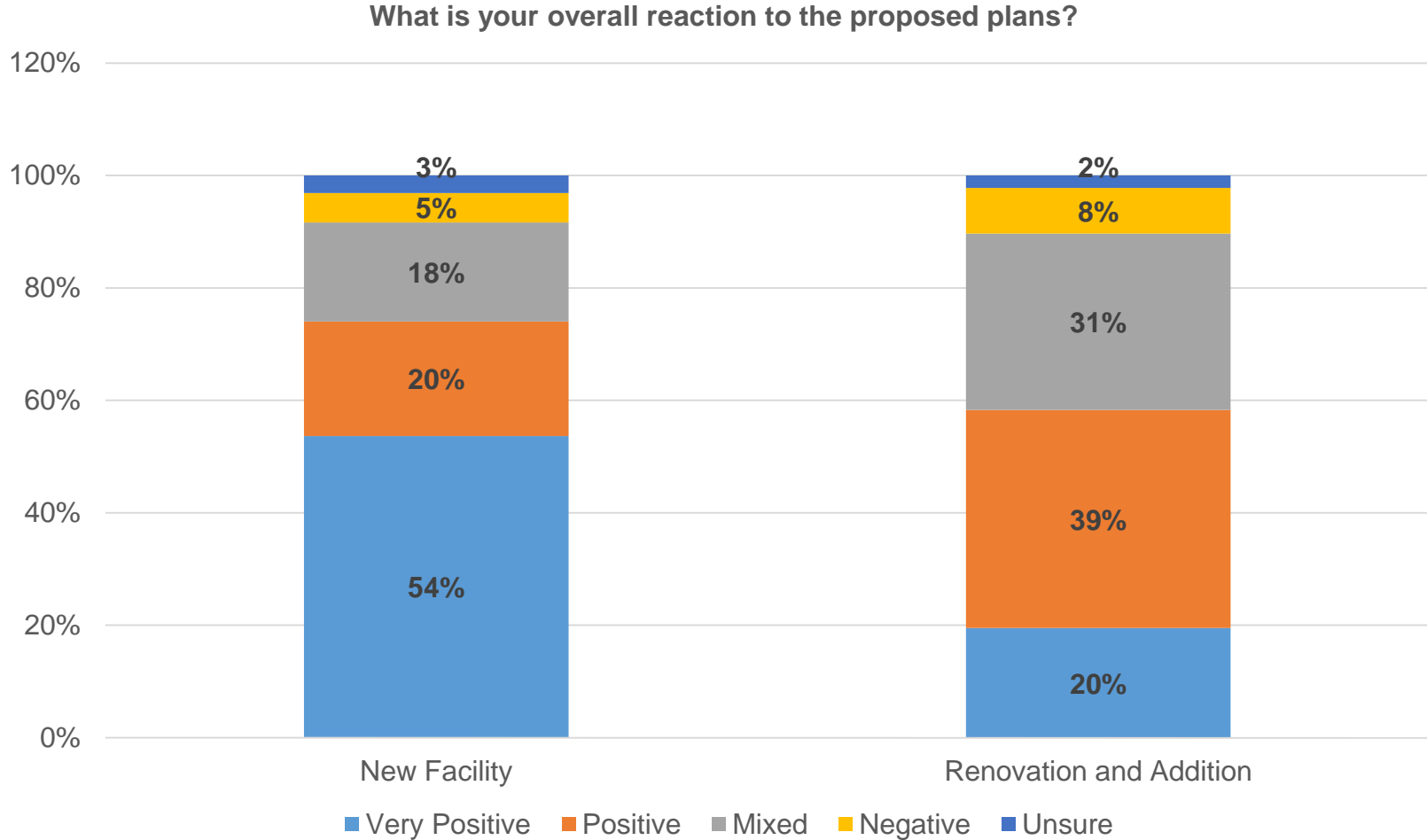


## Detailed Online Survey Statistics

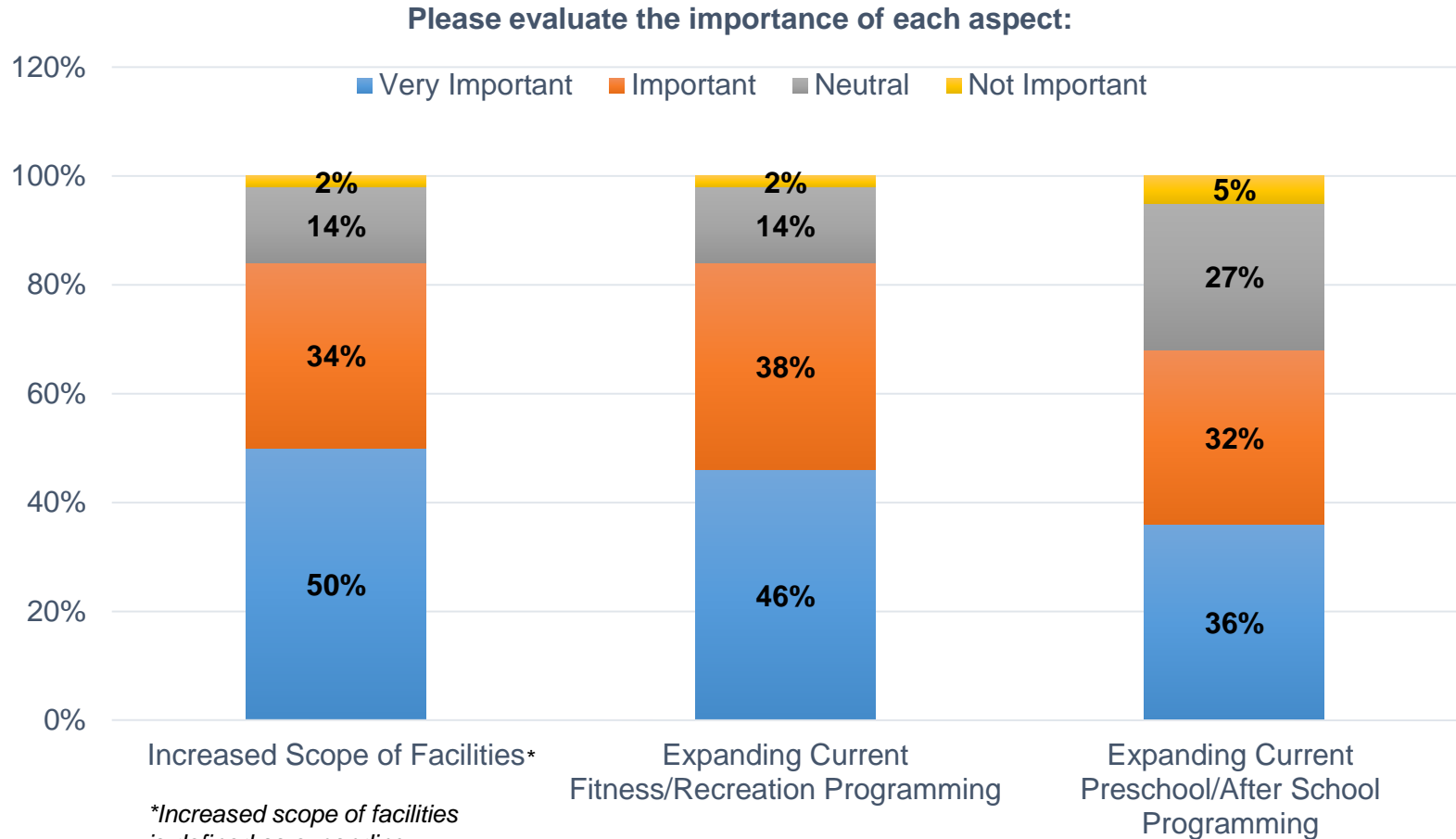
How valuable to the community are the programs and services offered at the Robert Crown Community Center?



## Detailed Online Survey Statistics



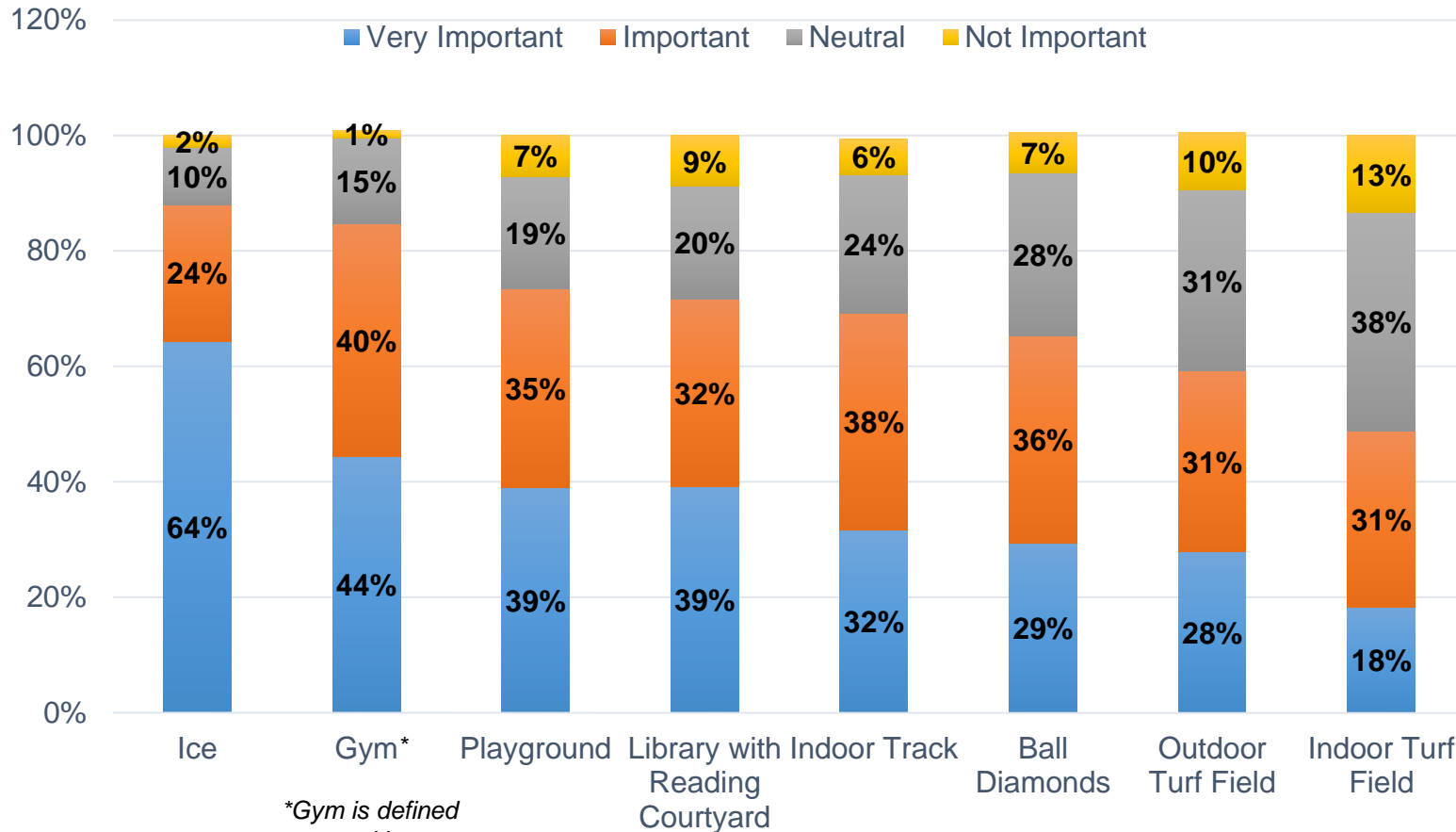
## Detailed Online Survey Statistics



*\*Increased scope of facilities is defined as expanding overall square footage to allow for a library with a reading courtyard, athletic spaces, educational rooms, offices, bathrooms, locker rooms, storage, etc.*

### Detailed Online Survey Statistics

Please evaluate the importance of each aspect:

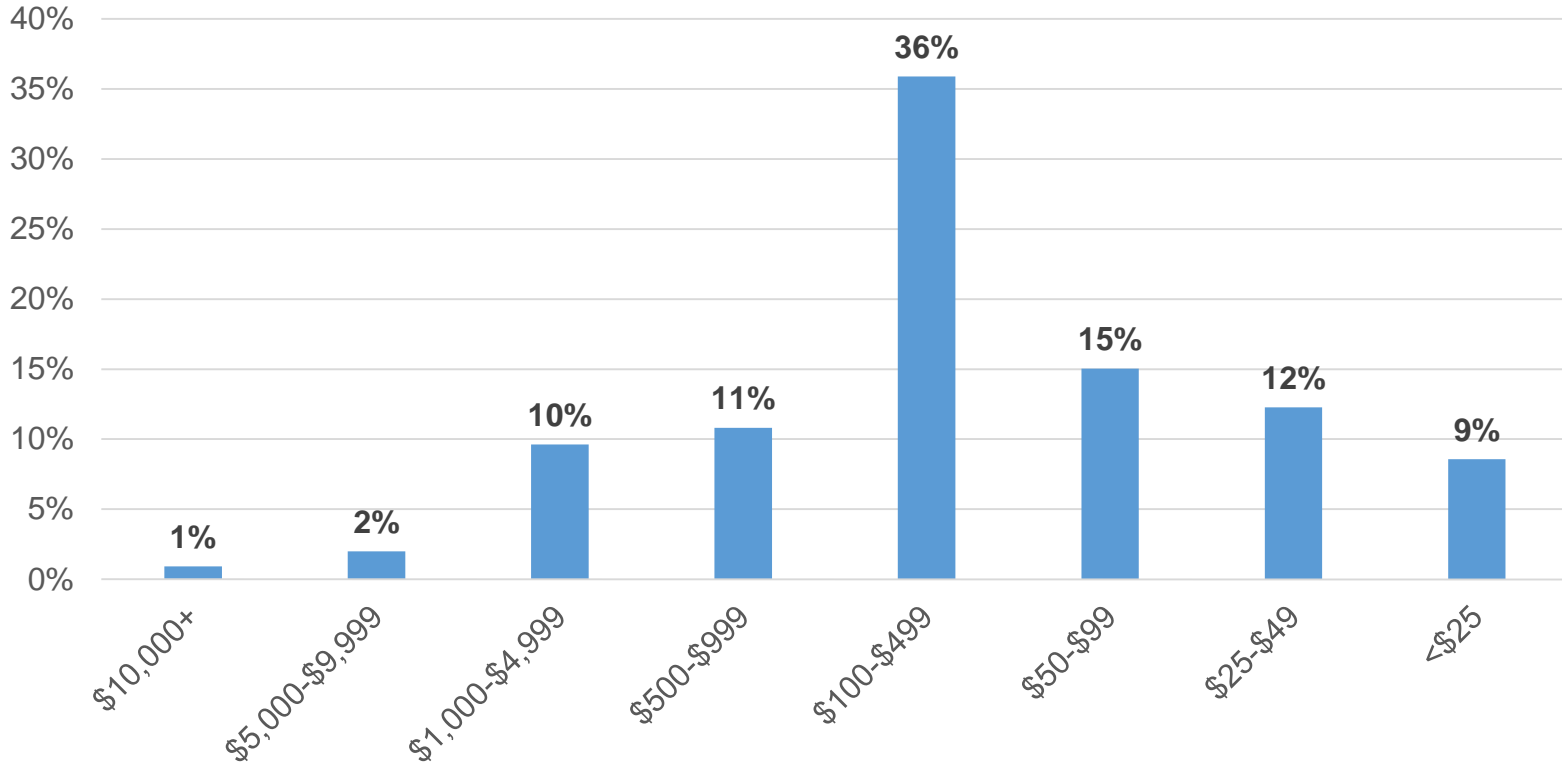


*\*Gym is defined as a multipurpose indoor space for basketball, volleyball, soccer, taekwondo, gymnastics, etc.*

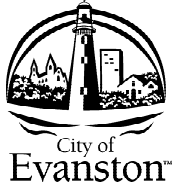


## Detailed Online Survey Statistics

For estimation purposes only, please mark the gift level that would be within your capabilities, if payable over a five-year period. This is not a commitment.



Note: Respondents selecting "Other" are not included in the graph above.



## Memorandum

To: Honorable Mayor and Members of the City Council

From: Martin Lyons, Assistant City Manager / CFO  
Joe McRae, Director of Parks, Recreation and Community Services  
Karen Danczak Lyons, Library Director

Subject: Recommendation for Fundraising Consulting Services for Robert Crown,  
RFP #15-24

Date: June 15, 2015

### Recommendation

Staff recommends that City Council authorize the City Manager to execute a consulting services agreement for fundraising at Robert Crown with Community Counselling Services Co., LLC (CCS) located at 155 North Wacker, Suite 1790, Chicago, Illinois 60606 at a total cost of \$477,500.

### Funding Sources

FY 2015 CIP #415555: \$873,000

### Discussion

Located at the corner of Main Street and Dodge Avenue, Crown Park and the Robert Crown Community Center and Ice Complex (Crown) deliver a wide range of recreational services. Crown Park provides a variety of outdoor athletic facilities for the entire Evanston community including four tennis courts, two softball fields, and one football field. Constructed in 1975, the 61,000 square foot Crown building contains one large ice skating arena, a small studio-practice rink, one basketball gymnasium, a child care room, and a variety of other multi-purpose rooms.

The Robert Crown Center is the most heavily used community center in the City. It is over 40 years old and due to heavy use, age, building (not life safety) code deficiencies and evolving community needs, Crown is in need of either replacement or significant renovation. Additionally, the Library has identified a need to serve west side residents with a flexible library learning space. In order to pool resources and develop synergy within the City, the Parks Recreation and Community Services Department and Library have partnered to either renovate or reconstruct Crown to meet these demands.

Over the past several years, staff working in concert with a steering committee, has explored a variety of mechanisms to secure funding for renovation or reconstruction including grant opportunities and public / private partnership ventures. These explorations have revealed that private fundraising, in conjunction with public investment, will likely yield successful results for a new or substantially renovated facility. As staff expertise in fundraising and development services are not available, the City issued a Request for Proposal for these services on March 12, 2015. On April 8, 2015, the Purchasing Division received proposals from two qualified professional consulting firms as noted below:

Consultant	Address
Community Counselling Services Co., Llc (CCS)	155 North Wacker, Suite 1790, Chicago, Illinois 60606
Ter Molen Watkins & Brandt Llc.	2 North Riverside Plaza, Suite 1030, Chicago, Illinois 60606

A committee was developed to review and evaluate the proposals consisting of the following members: Martin Lyons/Administrative Services, Joe McRae/PRCS, Karen Danczak Lyons/Library, Bob Dorneker/PRCS, Wynn Shawver/Library, Stefanie Levine/Public Works and Melissa Parker/PRCS. Each committee member individually reviewed the proposals based on:

1. Qualifications and Expertise
2. Price
3. Organization and Completeness of Proposal
4. Willingness to Execute City Agreement
5. M/W/EBE Participation

Following proposal review, the committee met to discuss the submissions and agreed to interview both candidate firms. After the interviews, the committee met again to discuss and score the consultants and determine which firm to recommend for award. A scoring breakdown of the two firms follows:

Consultant	Qualifications & Expertise (30)	Price (30)	Proposal Organization (15)	Willingness to Execute Agreement (15)	Proposed M/W/EBE (10)	Total (100)
CCS	30	27	15	15	0	87
Ter Molen	26	23	14	15	3	81

The City's RFP indicated that the selected consultant would immediately begin a comprehensive fundraising campaign for the project. However, both consultant responses strongly recommended that the City first perform a feasibility study to better determine the donor pool, cultivate potential community leaders and prepare the City for the campaign. Both consultant teams indicated that the feasibility study was vital to the campaign's success, particularly due to the City's current lack of established donor

base. After extensive deliberation, the review committee agrees that this strategy is critical to the project's success and will afford the City an opportunity to gauge community feedback, enhance the donor pool and strategically define the renovation or reconstruction scope in advance of the actual campaign.

A breakdown of both consultant firm fees follows:

Consultant	Miscellaneous Cost	Feasibility Study	Capital Campaign	Cost per interview during Feasibility Study
CCS	\$6,500	\$75,000	\$396,000	\$1,000
Ter Molen	At cost	\$60,000	\$225,000	\$1,714

At first glance, costs for CCS appear significantly higher than Ter Molen. However, in actuality CCS's proposal offers substantially more in services than the Ter Molen proposal which the committee feels are vital to project execution. During the feasibility study, Ter Molen's proposal offers 35 interviews with individual potential donors. By comparison, CCS's proposal includes between 50 and 75 similar interviews. The additional interviews provided by CCS will cast a substantially wider net within the donor community, an imperative step considering the limited base the City has currently established. During the capital campaign, Ter Molen's proposal includes coordination and marketing of the campaign but only in an off-site, supportive role. CCS's proposal however, includes full time and on-site campaign management. In the review committee's opinion, full time and hands on capital campaign support is critical to success due to the City's limited resources and expertise in this area.

Following consultant evaluation, the committee recommends CCS for award based on the scoring results, their team's significant experience and success with similar projects, their demonstrated understanding of this project, their proposed project approach and their references. CCS's references have been reviewed with favorable results. One of their local clients, Rotary International (RI) has an extensive background working with CCS and having favorable results. Staff found that RI has engaged the services of CCS in an ongoing consultative manner on multiple occasions, most notably for their global Polio Plus Campaign launched in 1985. Since that time, Rotary has contributed more than \$1.3 billion to immunize more than 2.5 billion children in 122 countries. Based on their experiences with CCS, and their local knowledge of the City of Evanston, professional staff at RI highly recommend CCS for this project specifically noting their responsiveness, adaptability and the vast resources that they command. RI indicates a high level of respect for their professionalism and ability to customize their efforts in response to the specific needs of any given campaign.

CCS has worked with a wide variety of organizations with varying levels of resources and existing fundraising capabilities, ranging from community based entities such as local churches to large international organizations with more complex agendas such as RI. Based on this recommendation we are confident CCS is well positioned to partner

with the City of Evanston to explore the current opportunity of a fundraising campaign for Robert Crown in order to recommend and facilitate the best practices that will result in a successful campaign.

CCS has requested a waiver of the City's M/W/EBE goal (see attached M/W/EBE memo for additional information).

As a result of the need to perform a feasibility study, the work will be conducted in two distinct phases. Phase 1 (Feasibility Study) will include strategic discussions with community members to assess capacity, development of a project timeline and preparation for the campaign effort. Phase 2 will include the actual donation campaign itself.

A breakdown of proposed funding for this project is as follows:

Item	Amount
CIP Funding	\$873,000.00
Expenses / encumbrances to date	\$0
Recommended Award	-\$477,500.00
Remaining Balance	\$395,500.00

Pending City Council approval, the proposed schedule for this project is to complete the feasibility study by the end of October 2015 and to conduct the capital campaign between October 2015 and October 2016. Architectural design work for the project, beginning with an RFP for consulting services, will likely be initiated during the capital campaign phase. Project construction would be anticipated to occur in 2017.

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Attachments:

MWEBE Memo

Crown renderings