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Massanutten Regional Library Fundraising Assessment

The Opportunity

Massanutten Regional Library is a seven-branch regional library system serving more than 162,000 residents across Harrisonburg, Page County, and Rockingham County, Virginia. Unlike many public libraries, MRL operates as a 501(c)(3) nonprofit, with funding that comes from both public support and private philanthropy.

CAC was engaged to help MRL evaluate and enhance its fundraising initiatives, with a focus on development structure, board engagement, donor communications, annual giving, planned giving, major gift opportunities, and readiness for a future capital campaign.

At the time of the project, MRL was entering this work from a position of strength and momentum. In FY25, the library welcomed more than 242,000 visitors, circulated more than 890,000 items, hosted a record 54,000 program attendees, and generated more than $19.5 million in community value through library services. The library had also recently been recognized as both Virginia Library of the Year and Harrisonburg-Rockingham Nonprofit of the Year, creating a timely opportunity to connect community pride, donor engagement, and philanthropic growth.

CAC provided the following deliverables:

- Fundraising assessment process plan, communications plan, stakeholder engagement plan, and meeting schedule
- Stakeholder survey, interview summaries, and leadership engagement exercises
- Peer library and local nonprofit fundraising comparison
- Review of current fundraising practices, donor communications, board materials, policies, and development documents
- Fundraising messaging framework, elevator speech, audience-specific messaging matrix, and impact messages
- Suggested updates to the online donation page and donor communications
- Best-practice recommendations for development operations, donor stewardship, board engagement, and annual planning
- Annual development plan, fundraising calendar, planned giving and major gift strategy, and capital campaign readiness summary
- Final consultation report, stakeholder presentation, and advancement roadmap



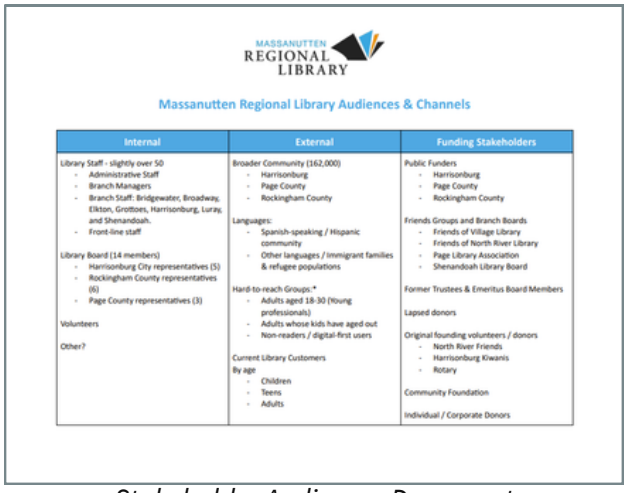
Assessment, Research, and Strategic Context

At the heart of the Massanutten Regional Library project was a practical question: how could MRL build on what was already working while creating the structure, messaging, and capacity needed for the next stage of philanthropic growth?

CAC began by establishing a clear process, mapping stakeholder groups, reviewing current communications channels, and gathering materials for analysis. These included MRL's gift acceptance policy, strategic plan progress updates, solicitation letters, sample newsletters, board reports, advancement updates, financial materials, and other governance and fundraising documents.

The project also included a comparison of MRL's fundraising structure and performance against peer Virginia libraries and selected local nonprofit organizations. This analysis showed that MRL was already raising support at or above the level of many similar libraries, especially when considering its size, staffing, and regional structure. MRL also stood out for dedicating professional staff time to advancement, which remains uncommon among many public libraries.

Through stakeholder interviews, surveys, and leadership engagement activities, CAC identified key themes related to fundraising, donor engagement, board involvement, community outreach, marketing, messaging, internal capacity, and future space needs. These findings helped shape a set of recommendations that reflected MRL's actual operating environment.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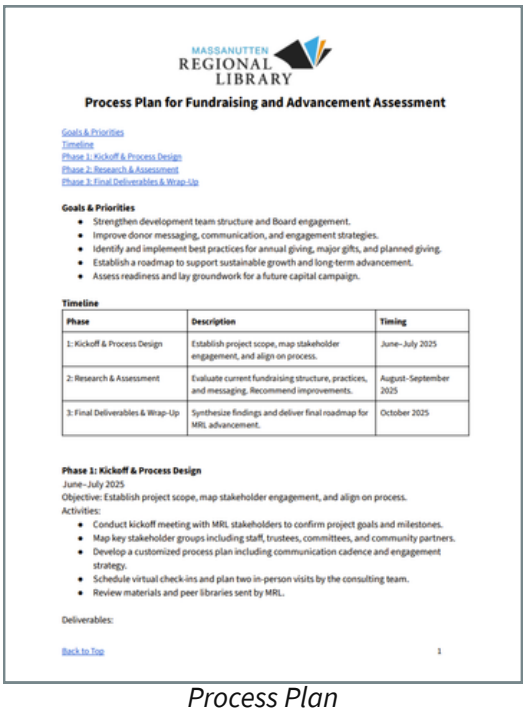
Massanutten Regional Library Audiences & Channels

Internal	External	Funding Stakeholders
Library Staff - slightly over 50 - Administrative Staff - Branch Managers - Branch Staff: Bridgewater, Broadway, Elkton, Grottoes, Harrisonburg, Luray, and Shenandoah. - Front-line staff Library Board (14 members) - Harrisonburg City representatives (5) - Rockingham County representatives (6) - Page County representatives (3) Volunteers Other?	Broader Community (162,000) - Harrisonburg - Page County - Rockingham County Languages: - Spanish-speaking / Hispanic community - Other languages / immigrant families & refugee populations Hard-to-reach Groups:* - Adults aged 18-30 (Young professionals) - Adults whose kids have aged out - Non-readers / digital-first users Current Library Customers By age - Children - Teens - Adults	Public Funders - Harrisonburg - Page County - Rockingham County Friends Groups and Branch Boards - Friends of Village Library - Friends of North River Library - Page Library Association - Shenandoah Library Board Former Trustees & Emeritus Board Members Lapsed donors Original founding volunteers / donors - North River Friends - Harrisonburg Kiwanis - Rotary Community Foundation Individual / Corporate Donors

Stakeholder Audiences Document

Sample Deliverables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Process Plan for Fundraising and Advancement Assessment

Goals & Priorities
Timeline
Phase 1: Kickoff & Process Design
Phase 2: Research & Assessment
Phase 3: Final Deliverables & Wrap-Up

Goals & Priorities

- Strengthen development team structure and Board engagement.
- Improve donor messaging, communication, and engagement strategies.
- Identify and implement best practices for annual giving, major gifts, and planned giving.
- Establish a roadmap to support sustainable growth and long-term advancement.
- Assess readiness and lay groundwork for a future capital campaign.

Timeline

Phase	Description	Timing
1: Kickoff & Process Design	Establish project scope, map stakeholder engagement, and align on process.	June–July 2025
2: Research & Assessment	Evaluate current fundraising structure, practices, and messaging. Recommend improvements.	August–September 2025
3: Final Deliverables & Wrap-Up	Synthesize findings and deliver final roadmap for MRL advancement.	October 2025

Phase 1: Kickoff & Process Design
June–July 2025
Objective: Establish project scope, map stakeholder engagement, and align on process.
Activities:

- Conduct kickoff meeting with MRL stakeholders to confirm project goals and milestones.
- Map key stakeholder groups including staff, trustees, committees, and community partners.
- Develop a customized process plan including communication cadence and engagement strategy.
- Schedule virtual check-ins and plan two in-person visits by the consulting team.
- Review materials and peer libraries sent by MRL.

Deliverables:

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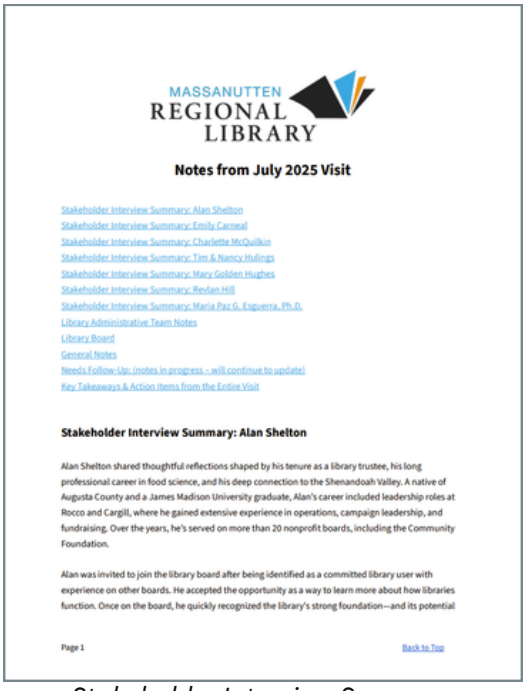
Process Plan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Notes from July 2025 Visit

Stakeholder Interview Summary: Alan Shelton
Stakeholder Interview Summary: Emily Carneal
Stakeholder Interview Summary: Charlette McQuilkin
Stakeholder Interview Summary: Tim & Nancy Hulings
Stakeholder Interview Summary: Mary Golden Hughes
Stakeholder Interview Summary: Reylan Hill
Stakeholder Interview Summary: Maria Paz G. Esguerra, Ph.D.
Library Administrative Team Notes
Library Board
General Notes
Needs Follow-Up: (notes in progress – will continue to update)
Key Takeaways & Action Items from the Entire Visit

Stakeholder Interview Summary: Alan Shelton

Alan Shelton shared thoughtful reflections shaped by his tenure as a library trustee, his long professional career in food science, and his deep connection to the Shenandoah Valley. A native of Augusta County and a James Madison University graduate, Alan's career included leadership roles at Rocco and Cargill, where he gained extensive experience in operations, campaign leadership, and fundraising. Over the years, he's served on more than 20 nonprofit boards, including the Community Foundation.

Alan was invited to join the library board after being identified as a committed library user with experience on other boards. He accepted the opportunity as a way to learn more about how libraries function. Once on the board, he quickly recognized the library's strong foundation—and its potential

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Stakeholder Interview Summary

Donor Messaging and Communications

A major part of the MRL assessment focused on fundraising communications. CAC reviewed current donor messaging and engagement across MRL's e-newsletter, solicitation letters, donation page, and other communications channels. The review found that MRL's materials were warm, professional, and consistent, with a strong focus on programs and community connection. At the same time, CAC identified opportunities to make donor communications more impact-focused, more segmented, and more action-oriented.

For example, CAC recommended that MRL shift more of its donor messaging from "how to give" to "why your gift matters." This included clearer calls to action, more visible use of impact data, donor testimonials, patron stories, recognition of past giving, and more tailored messages for different donor audiences, such as families, retirees, business leaders, legacy donors, and longtime supporters.

CAC also developed a revised fundraising messaging framework organized around five positioning pillars: Welcoming & Inclusive, Access to Knowledge & Opportunity, Community Impact, High Value/High Efficiency, and Community Value & Pride. These pillars gave staff, trustees, Friends groups, funders, donors, and community partners a shared language for explaining why private support matters and how gifts translate into meaningful community benefit.

One core message developed through the project was:

Unlike many libraries, MRL is a nonprofit that relies on a mix of private donations and public funding. While public support sustains core operations, MRL must raise additional private support each year to strengthen its impact and adapt to the evolving needs of the community.

CAC then connected this message to specific areas of impact, including early literacy, summer reading, access and inclusion, workforce development, health and aging, and social connection. These impact messages were designed for practical use in grant proposals, donor meetings, board conversations, public funding discussions, annual appeals, newsletters, and campaign materials.

	1. Welcoming & Inclusive	2. Access to Knowledge & Opportunity	3. Community Impact	4. High Value, High Efficiency	5. Community Value & Pride
Public Funders	Your investment keeps the library open and welcoming for all, including immigrant families, seniors, and those experiencing housing insecurity.	Continued funding ensures free access to essential technology, online resources, and expert staff for every resident.	Your support allows us to respond quickly to emerging needs and partner with schools, senior centers, and other agencies.	With fewer than 32 FTEs, MRL maximizes every public dollar to deliver a high return on investment for the community.	Your continued investment sustains a trusted community resource and regional point of pride (Library of the Year, Nonprofit of the Year).
Existing Donors	Your generosity helps ensure that everyone — regardless of income, background, or circumstance — feels at home at MRL.	Your gifts keep collections growing and programs accessible, from digital resources to literacy support.	Your continued support helps expand programs and outreach that make a measurable difference in thousands of lives each year.	Every dollar you give is stretched to deliver the greatest possible value and impact.	Your past support helped MRL earn the Virginia Library of the Year award — help us build on that momentum for the future.
Potential Donors	Join us in making the library a place where everyone belongs — your first gift helps keep MRL welcoming and inclusive.	Your support will grow access to life-changing resources, from early literacy kits to job-seeker tools.	With your partnership, we can expand programs that change lives and strengthen the community.	Every contribution, no matter the size, is put to work efficiently to benefit thousands across our region.	Be part of what makes our library an award-winning source of community pride and value.
Friends Groups	Help champion MRL's role as the community's most inclusive and welcoming space by sharing our story.	Advocate for library resources and volunteer your time to help expand access to programs and collections.	Friends like you amplify the library's impact by promoting events, helping with outreach, and supporting fundraising efforts.	Your volunteer hours and advocacy multiply the efficiency and effectiveness of every dollar raised.	Celebrate and share our Virginia Library of the Year recognition as proof of what Friends' support makes possible.

Messaging Matrix Positioning Pillars x Audience Groups

Feedback

"I can share that our first donor appreciation event went very well—a cocktail hour and meet and greet with award-winning author Beth Macy. We've just finished the event debrief. Also, we passed $400K in donations for the first time in a non-capital campaign year with two months to go, up from $345K total last fiscal year. Finally, our amount of first time donors is now more than double last year's total. You will remember that expanding our donor base was one of our big requests in our Advancement Assessment. Your efforts have greatly contributed to these successes, in just the 6-7 months since we began implementing your recommendations."

– Zachary Elder, Director, Massanutten Regional Library

Fundraising Strategy, Donor Growth, and Stewardship

CAC's recommendations also focused on strengthening the fundamentals of MRL's development program. The assessment affirmed that MRL had many strong building blocks already in place: community goodwill, engaged leadership, professional advancement staffing, a growing number of major supporters, and a donor base that could be further cultivated through more consistent stewardship and segmentation.

The report recommended creating a written strategic development plan with measurable fundraising goals, building an annual fundraising calendar, tracking key metrics, and using donor data to inform cultivation, solicitation, and stewardship strategies. CAC also recommended growing the number of annual supporters giving at higher levels in order to strengthen the future major gift pipeline.

Board engagement was another important focus. CAC recommended equipping board members with concise talking points, impact data, and stewardship opportunities so they could participate in advancement in ways that matched their comfort level, connections, and capacity. Recommendations included engaging board members in thank-you calls, donor notes, relationship-building, community introductions, and advocacy conversations — not only direct solicitation.

The assessment also encouraged MRL to broaden the circle of people involved in fundraising by engaging former trustees, major donors, Friends groups, and other community champions. This was framed not only as an annual giving strategy, but also as an early step toward identifying potential campaign leadership and cultivating a stronger base of long-term support.

Results as of May 2025
6–7 months after MRL began implementing CAC recommendations

First time surpassing $400K in a non-capital campaign year, with two months still remaining

Up from $345K total donations the previous fiscal year

2x+ first-time donors, more than double the prior year's total



Revised as of 11.6.25

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Annual Development Plan Recommendations

Plan for approximately 3-5 specific, measurable development goals for the year. Evaluate all activities to ensure alignment with those annual and/or longer-term goals. Goals should have a mix of focusing on retaining/stewarding current donors, growing your donor base, and ways to increase support.

Goal Examples:

- Raise $350,000 in unrestricted support during FY26 while pursuing restricted funding for other key priorities (*how much was restricted vs unrestricted in past?*); or 2 goals – amount for unrestricted and amount for restricted that comes from individuals + grants
- Increase the number of donors giving $1,000+ from 26 in FY24 to 40 in FY26
- Begin to expand donor pipeline by adding 100 potential prospects to donor database for communication and annual solicitations
- Increase donor stewardship by launching a quarterly short newsletter, increasing number of email addresses attached to donor records, and planning for an annual donor appreciation event.
- Meet quarterly with Advancement Committee to engage their support with meeting fundraising goals.

Use a written annual plan as the framework for mapping out key strategies for meeting your goals. The calendar framework likely stays relatively similar from year to year given that that your key fundraising timeframes are currently July, November and April. Individual activities will change to meet each year's new goals, reflect lessons learned from previous fiscal years, or accommodate special needs within a given year.

Fundraising calendar begins on the next page.

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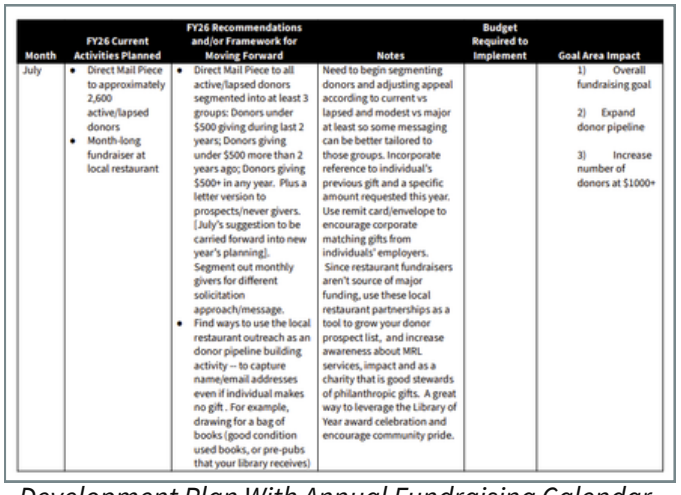


Month	FY26 Current Activities Planned	FY26 Recommendations and/or Framework for Moving Forward	Notes	Budget Required to Implement	Goal Area Impact
July	• Direct Mail Piece to approximately 2,600 active/lapsed donors • Month-long fundraiser at local restaurant	• Direct Mail Piece to all active/lapsed donors segmented into at least 3 groups: Donors under $500 giving during last 2 years; Donors giving under $500 more than 2 years ago; Donors giving $500+ in any year. Plus a letter version to prospects/never givers. [July's suggestion to be carried forward into new year's planning]. Segment out monthly givers for different solicitation approach/message. • Find ways to use the local restaurant outreach as an donor pipeline building activity -- to capture name/email addresses even if individual makes no gift . For example, drawing for a bag of books (good condition used books, or pre-pubs that your library receives)	Need to begin segmenting donors and adjusting appeal according to current vs lapsed and modest vs major at least so some messaging can be better tailored to those groups. Incorporate reference to individual's previous gift and a specific amount requested this year. Use remit card/envelope to encourage corporate matching gifts from individuals' employers. Since restaurant fundraisers aren't source of major funding, use these local restaurant partnerships as a tool to grow your donor prospect list, and increase awareness about MRL services, impact and as a charity that is good stewards of philanthropic gifts. A great way to leverage the Library of Year award celebration and encourage community pride.		1) Overall fundraising goal 2) Expand donor pipeline 3) Increase number of donors at $1000+

Development Plan With Annual Fundraising Calendar

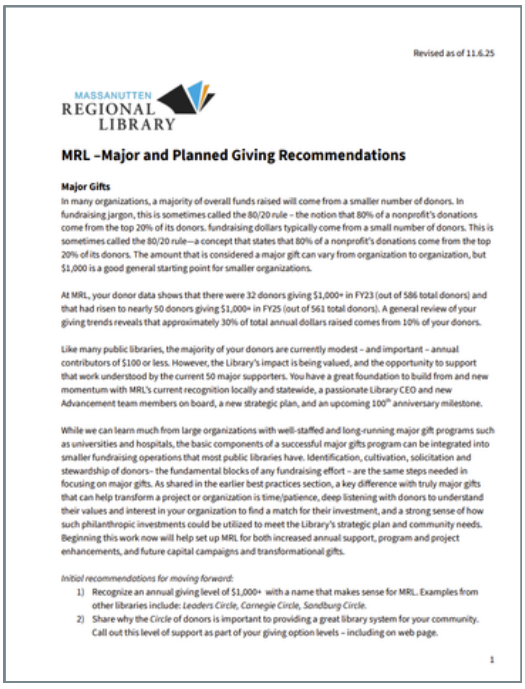
Campaign Readiness and Future Opportunities

The Massanutten project also looked ahead to future fundraising opportunities. CAC evaluated MRL's readiness for planned giving, major gifts, and a future capital campaign, with attention to staffing capacity, board involvement, donor relationships, community awareness, and the need for a stronger case for support. The goal was not to rush MRL into a campaign, but to identify the foundational steps needed to prepare for one successfully.

CAC also identified opportunities to connect public recognition and milestone moments to fundraising. For example, the report recommended using MRL's Virginia Library of the Year recognition as a donor engagement and public relations opportunity through a "My MRL Impact" campaign, inviting patrons, staff, donors, and community partners to share stories of the library's impact.

In addition, CAC recommended ways to connect MRL's upcoming centennial activities to fundraising, including story sponsorships, anniversary events, legacy giving, donor cultivation moments, and a possible "Next 100" or "Century Fund" campaign. These recommendations were designed to help MRL build visibility, deepen emotional connection, and create natural entry points for donor conversations.

The final consultation report provided MRL with both strategic direction and practical next steps. Rather than offering a generic fundraising framework, CAC created a roadmap rooted in MRL's structure, community, donor base, staffing capacity, board dynamics, and future aspirations. The result was a realistic and actionable foundation for strengthening annual giving, deepening donor relationships, expanding planned and major giving, engaging board and community champions, and preparing for future campaign opportunities.



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MRL –Major and Planned Giving Recommendations

Major Gifts

In many organizations, a majority of overall funds raised will come from a smaller number of donors. In fundraising jargon, this is sometimes called the 80/20 rule – the notion that 80% of a nonprofit's donations come from the top 20% of its donors. fundraising dollars typically come from a small number of donors. This is sometimes called the 80/20 rule—a concept that states that 80% of a nonprofit's donations come from the top 20% of its donors. The amount that is considered a major gift can vary from organization to organization, but $1,000 is a good general starting point for smaller organizations.

At MRL, your donor data shows that there were 32 donors giving $1,000+ in FY23 (out of 586 total donors) and that had risen to nearly 50 donors giving $1,000+ in FY25 (out of 561 total donors). A general review of your giving trends reveals that approximately 30% of total annual dollars raised comes from 10% of your donors.

Like many public libraries, the majority of your donors are currently modest – and important – annual contributors of $100 or less. However, the Library's impact is being valued, and the opportunity to support that work understood by the current 50 major supporters. You have a great foundation to build from and new momentum with MRL's current recognition locally and statewide, a passionate Library CEO and new Advancement team members on board, a new strategic plan, and an upcoming 100th anniversary milestone.

While we can learn much from large organizations with well-staffed and long-running major gift programs such as universities and hospitals, the basic components of a successful major gifts program can be integrated into smaller fundraising operations that most public libraries have. Identification, cultivation, solicitation and stewardship of donors– the fundamental blocks of any fundraising effort – are the same steps needed in focusing on major gifts. As shared in the earlier best practices section, a key difference with truly major gifts that can help transform a project or organization is time/patience, deep listening with donors to understand their values and interest in your organization to find a match for their investment, and a strong sense of how such philanthropic investments could be utilized to meet the Library's strategic plan and community needs. Beginning this work now will help set up MRL for both increased annual support, program and project enhancements, and future capital campaigns and transformational gifts.

Initial recommendations for moving forward:

1) Recognize an annual giving level of $1,000+ with a name that makes sense for MRL. Examples from other libraries include: *Leaders Circle, Carnegie Circle, Sandburg Circle.*
2) Share why the *Circle* of donors is important to providing a great library system for your community. Call out this level of support as part of your giving option levels – including on web page.

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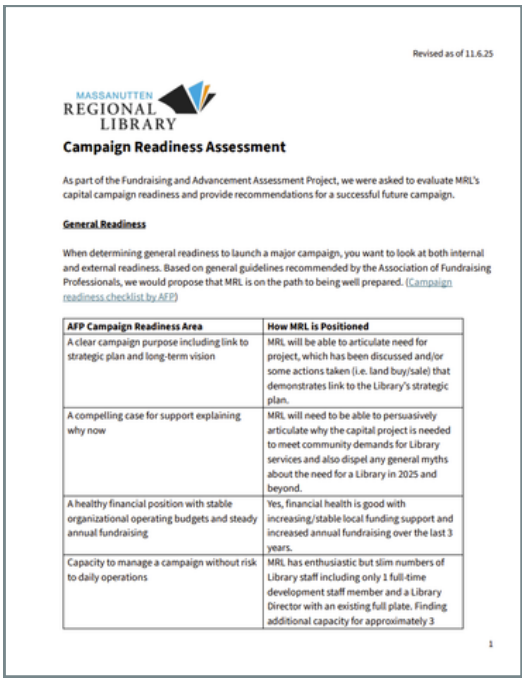
Major Gifts Strategy



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Campaign Readiness Assessment

As part of the Fundraising and Advancement Assessment Project, we were asked to evaluate MRL's capital campaign readiness and provide recommendations for a successful future campaign.

General Readiness

When determining general readiness to launch a major campaign, you want to look at both internal and external readiness. Based on general guidelines recommended by the Association of Fundraising Professionals, we would propose that MRL is on the path to being well prepared. (Campaign readiness checklist by AFP)

AFP Campaign Readiness Area	How MRL is Positioned
A clear campaign purpose including link to strategic plan and long-term vision	MRL will be able to articulate need for project, which has been discussed and/or some actions taken (i.e. land buy/sale) that demonstrates link to the Library's strategic plan.
A compelling case for support explaining why now	MRL will need to be able to persuasively articulate why the capital project is needed to meet community demands for Library services and also dispel any general myths about the need for a Library in 2025 and beyond.
A healthy financial position with stable organizational operating budgets and steady annual fundraising	Yes, financial health is good with increasing/stable local funding support and increased annual fundraising over the last 3 years.
Capacity to manage a campaign without risk to daily operations	MRL has enthusiastic but slim numbers of Library staff including only 1 full-time development staff member and a Library Director with an existing full plate. Finding additional capacity for approximately 3

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Capital Campaign Readiness Summary