

Spring 2023

# OWENSBORO SENIOR COMMUNITY CENTER & YMCA

FEASIBILITY STUDY  
EXECUTIVE SUMMARY



# WHAT TO EXPECT

- ◎ **STUDY GOALS**
- ◎ **METHODOLOGY & SCOPE OF WORK**
- ◎ **INTERVIEW FINDINGS & OBSERVATIONS**
- ◎ **RECOMMENDATIONS**
- ◎ **NEXT STEPS**
- ◎ **TIMELINE**
- ◎ **QUESTIONS**



# FEASIBILITY STUDY GOALS

## SENIOR COMMUNITY CENTER & OWENSBORO YMCA

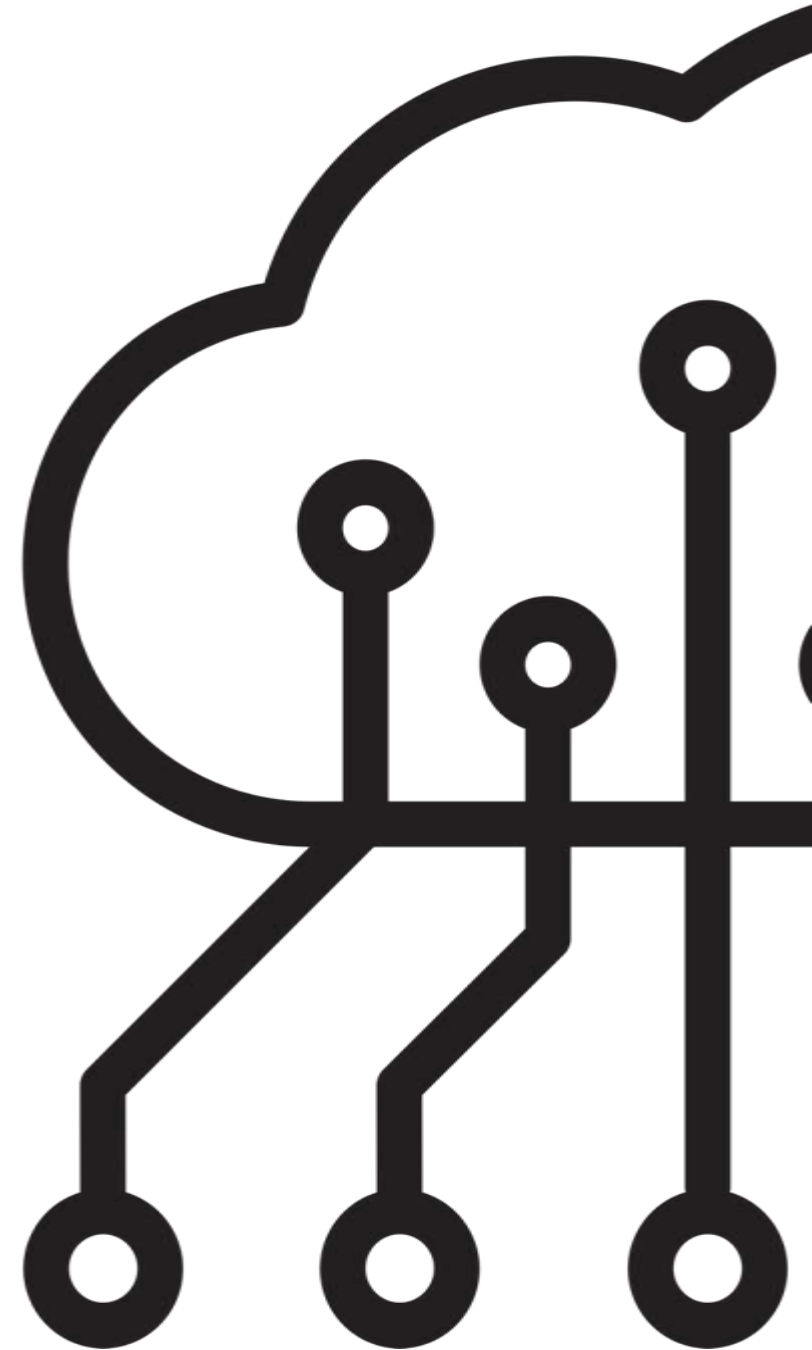
- Image of the Senior Community Center
- Image of the Owensboro YMCA
- Opinion of the proposed plans and projected goal.
- Availability and potential of large gifts.
- Availability of potential leadership for the campaign.
- Timing, priority and strategy for the campaign.





# **METHODOLOGY & SCOPE OF WORK**

**FEASIBILITY STUDY  
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# STUDY INTERVIEWS

## OVERVIEW

- **39 community leaders interviewed**
- **34 face-to-face or virtual sessions**
- **Tested \$8,000,000 to support renovation of the YMCA to include the relocation of the Senior Center**
- **Becky Barnhart, SCC and John Alexander, YMCA**
- **DBD Group: Michele Goodrich, Jon Simons**



# KEY QUESTIONS

- **How do you feel about the two organizations?**
- **How do you feel about the proposed campaign?**
- **How do you feel about the proposed partnership/co-location?**
- **How do you feel about the goal?**
- **Where do think the top gifts will come from?**
- **Who do you think must be involved in the leadership for the campaign to be successful?**
- **Might you (personally) or your organization/company contribute to this effort?**
- **How do you feel about launching a major initiative at this time?**





# STUDY MATERIALS



SERVING CHILDREN,  
FAMILIES AND  
SENIORS IN  
OWENSBORO AND  
DAVISS COUNTY



Putting Christian principles into practice through programs and services that build a healthy spirit, mind, and body for all.



**128** years of service  
**4,776** members  
**1,071** are seniors  
**\$38,240** provided in financial assistance to members

Health & Wellness • Aquatics • Child Care  
Summer Camp • Sports  
After-School Care



Providing and coordinating services and social activities for seniors that enhance their dignity, improve their independence and encourage their involvement in the community.



**55** years of service  
**3,100** members  
**96,608** meals distributed  
**50+** programs and events

Transportation • Meals on Wheels • Social Activities  
Education • Health Promotion • Outreach  
Recreation • Advocacy • Pet Assistance



## OUR VISION FOR THE FUTURE

### THE NEED FOR MORE

The Y and Senior Center are highly valued in the community, yet...

- The facilities are outdated and are limiting growth and program opportunities.
- Older facilities pose accessibility and sustainability challenges.
- We could reach more seniors with programming.

Expand and renovate at the current YMCA site to include a new Senior Center

Seniors can take advantage of services at both organizations

Create a community destination

Maximize partnership opportunities

Design for the future and long-term flexibility and community needs

Create an environment that represents and welcomes all

Ensure ample green space for outdoor programming



# STUDY MATERIALS



## MAKING VISION A REALITY

GIFTS NEEDED FOR AN \$8 MILLION CAMPAIGN

# of Gifts	Amount	3 Annual Payments	5 Annual Payments	Cumulative Total
<b>LEGACY</b>				
1	\$1,500,000	\$500,000	\$300,000	\$1,500,000
1	\$1,000,000	\$333,333	\$200,000	\$2,500,000
<b>LEADERSHIP</b>				
1	\$750,000	\$250,000	\$150,000	\$3,250,000
3	\$500,000	\$166,667	\$100,000	\$4,750,000
4	\$250,000	\$83,333	\$50,000	\$5,750,000
5	\$100,000	\$33,333	\$20,000	\$6,750,000
<b>MAJOR</b>				
8	\$75,000	\$25,000	\$15,000	\$6,780,000
10	\$50,000	\$16,667	\$10,000	\$7,200,000
18	\$25,000	\$8,333	\$5,000	\$7,680,000
22	\$10,000	\$3,333	\$2,000	\$7,820,000
<b>COMMUNITY</b>				
92	\$10,000 and below			\$8,800,000

**NOTE:** Total project costs are \$12.4MM. The City and County have committed \$5MM towards the joint project at this location.



## LEADING THE WAY

### OWENSBORO FAMILY YMCA BOARD OF DIRECTORS

Bo Ivey, Chair	Ashley Knight
Abby Shelton, Vice Chairman	Drew Hardesty
Dr. Steven Block, Secretary	Jeremy Edge
Harrison Price, Treasurer	Keith Wells
Lynn Holland, Immediate Past Chair	Scott Kramer
Justin Marks	Mark Berry
Angel Welsh	Mike Alexander
Allyson Sanders	

### SENIOR COMMUNITY CENTER OF OWENSBORO-DAVIESS COUNTY

Jennifer Allen, Chair	D.J. Johnson
Pam Smith-Wright, Vice Chair	Kirk Kirkpatrick
Melinda Cornell, Secretary	Joe Mason
J.T. Fulkerson, Treasurer	Paula Moore Rayborn
John Burlew	Brenda Nesmith
Bill Cooper	Tina Wright
Ed Higdon	Brad Youngman

The Senior Community Center and the Owensboro Family YMCA have researched their capabilities in meeting the needs of our community. The challenges of individually obtaining and providing adequate resources and capacity in order to sustain our impacts have become very apparent. Therefore, with the support of both boards of directors, the two organizations are moving forward with a feasibility study to gauge the support of our community for the organizations to collaborate in sharing facilities and services in order to provide the best and greatest impact as we carry out our missions.







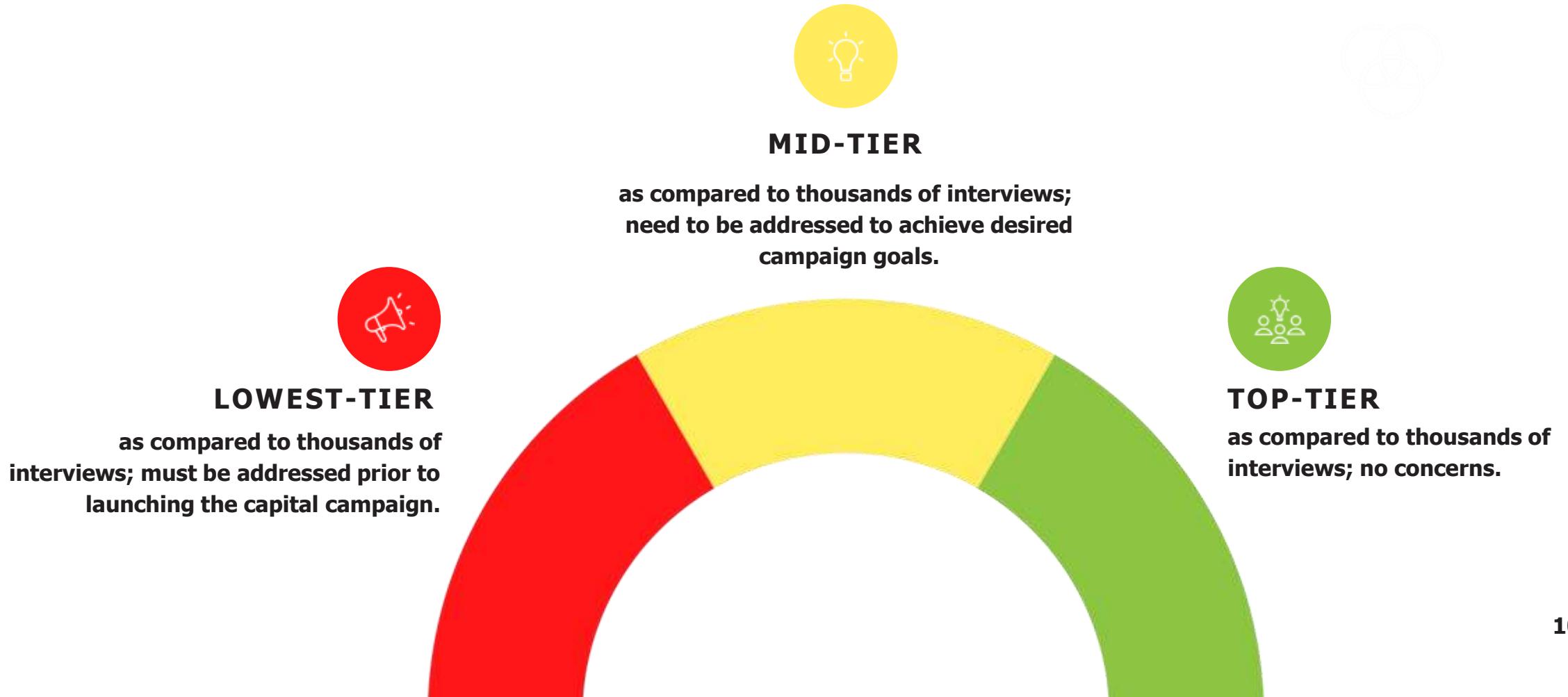
# **INTERVIEW FINDINGS & OBSERVATIONS**

**FEASIBILITY STUDY  
EXECUTIVE SUMMARY**



# COMPARISON INDICATOR

## BASED ON SIMILAR PROJECTS

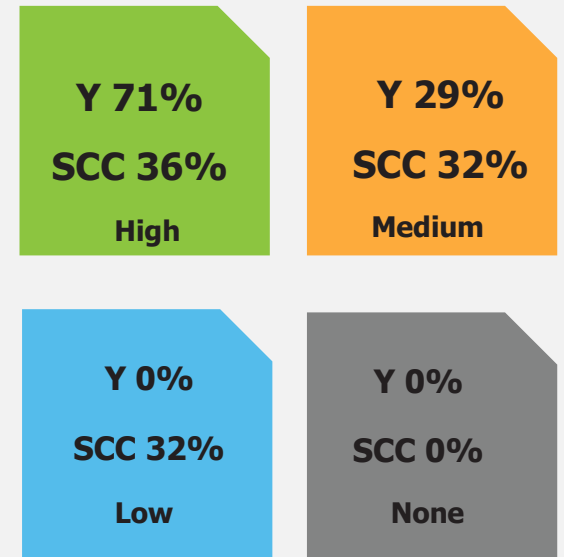


# WHAT VALUE DO THESE ORGANIZATIONS BRING TO THE COMMUNITY?

- “The Y continues to be a place to **bring the community together**”.
- SCC is a **safe social gathering place** for seniors.
- Both organizations **offer support, friendships, activities**.
- One serves **Older Adults** and the other is focused on **kids, teens, families, and adults of all ages**.
- **Both are important** to our community.



## FAMILIARITY WITH ORGANIZATIONS, THEIR PROGRAMS AND SERVICES?

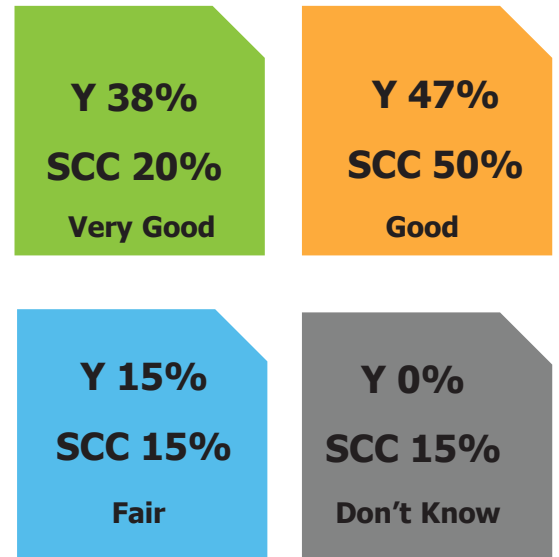


## COMMENTS ON IMAGES

- “The Senior Center reminds us that we need to **honor and value our older adults**”.
- “The YMCA has **touched all of us**”.
- Becky and John are regarded as **strong leaders** who have made a positive impact on the organization they lead.
- Both facilities are old and tired and need **renovations and upgrades**.



### WHAT IS THE OVERALL IMAGE OF THESE ORGANIZATIONS IN THE COMMUNITY?



## COMMENTS ON CAPITAL

- The **collaboration makes sense** and is a good way to **maximize funds and opportunities**.
- **Need more information** before forming an opinion (other options considered, identify the mutual benefits, quantify the cost benefits)
- **Not sure** seniors want to be around so many kids and teens
- **Need to know** that the leaders of the organizations are committed to making this work



**DO YOU THINK THAT THE TWO ORGANIZATIONS ARE ON THE RIGHT TRACK WITH THE PROJECTS OUTLINED WITHIN THIS CAMPAIGN?**



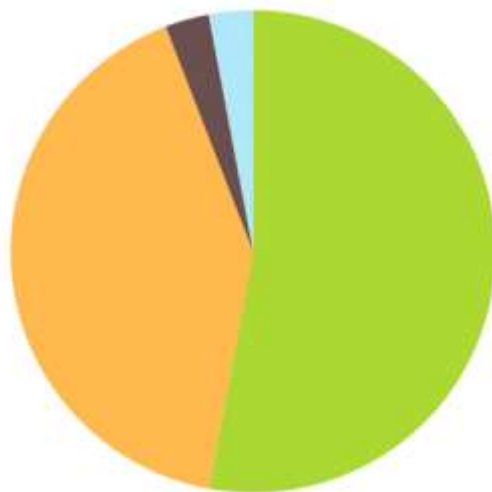
● Yes: 70.6%  
● Unsure: 23.5%  
● No: 5.9%



## FEASIBILITY



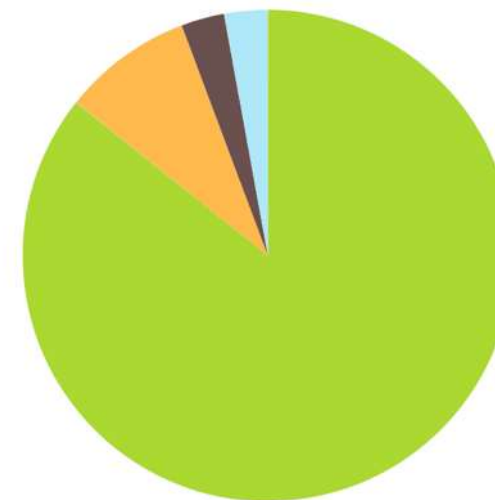
**DO YOU BELIEVE THAT A  
CAMPAIGN OF \$8 MILLION IS  
REALISTIC AND ATTAINABLE OVER  
A 3-5 YEAR PLEDGE PERIOD?**



● Yes: 52.9%  
● Maybe: 41.2%  
● Not Asked: 2.9%  
● Don't know: 2.9%



**ARE THERE INDIVIDUALS, BUSINESSES  
OR FOUNDATIONS WHO HAVE THE  
ABILITY TO GIVE THESE KINDS OF GIFTS  
OVER A 3-5 YEAR PLEDGE PERIOD?**



● Yes: 85.7%  
● Maybe: 8.6%  
● Not Asked: 2.9%  
● Don't know: 2.9%

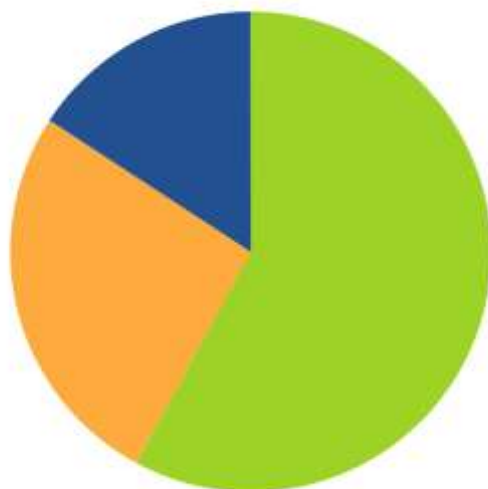
# COMMENTS ON CAPITAL

- **Other local campaigns have struggled** to raise much less than \$8M.
- **The money is here**, but you need to lift up why this is important to “everyone”.
- It will be a **“heavy lift”** for this community.
- Ultimately, it’s about whether people **care enough** to make it happen.
- “Only if all the **controversy is cut out**. Leave no doubt in anyone's mind that this was **looked at thoroughly**”.





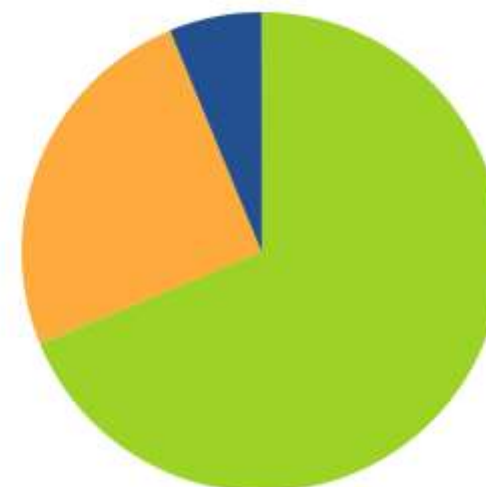
**DO YOU FEEL THAT YOUR  
BUSINESS/FOUNDATION WOULD  
CONSIDER A GIFT TO THIS PROJECT?**



● Yes: 57.9%  
● Maybe: 26.3%  
● No: 15.8%



**WOULD YOU PERSONALLY  
CONSIDER MAKING A GIFT TO THE  
PROPOSED CAMPAIGN?**



● Yes: 68.8%  
● Maybe: 25.0%  
● No: 6.3%

**WOULD YOU BE WILLING TO  
PLAY A ROLE ON THE  
CAMPAIGN LEADERSHIP  
CABINET, SERVE AS AN  
AMBASSADOR OR OPEN KEY  
DOORS IF CALLED UPON?**

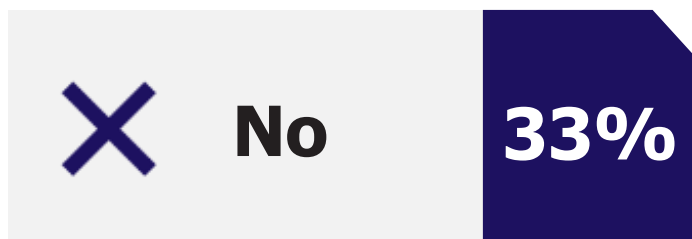
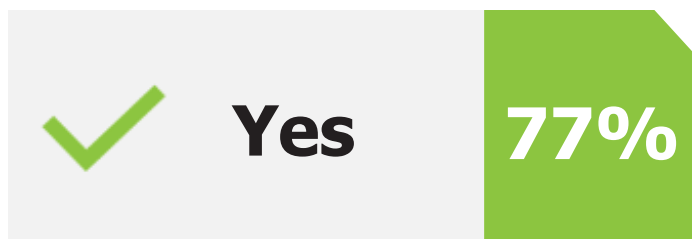


- Not Asked: 50.0%
- Yes: 23.5%
- Unsure: 17.6%
- No: 8.8%

## COMMUNITY RECEPTIVITY AND ENVIRONMENT



**DO YOU KNOW ORGANIZATIONS THAT  
ARE PLANNING TO CONDUCT A  
SIGNIFICANT CAMPAIGN (OVER \$1M)  
IN THE SAME TIME PERIOD?**



## ORGANIZATIONS MENTIONED:

- Botanical Gardens
- Area Churches
- Fine Art Museum
- Kentucky Wesleyan College
- Brescia University

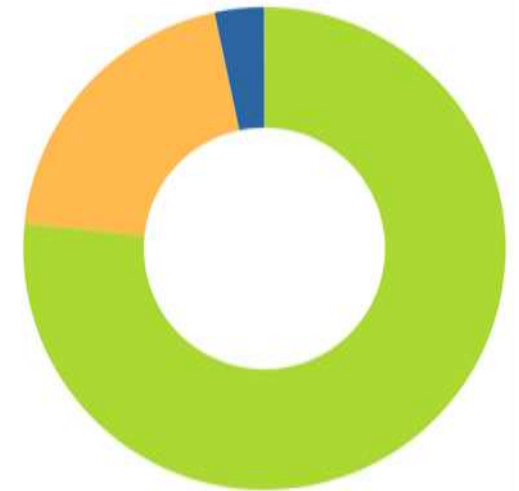


## COMMENTS ON TIMING

- There is funding available now for this project – so **time to get started** raising the rest.
- “Anytime you can do the **right thing is the right time**”.
- Going in to a **tough economic time**
- Owensboro **doesn’t experience the same highs and lows** economically as other places.
- These projects have been talked about for many years. **Lots of stops and starts.**



**DOES NOW APPEAR TO BE  
AN APPROPRIATE TIME TO  
BEGIN THIS CAMPAIGN?**



- Yes: 76.7%
- Maybe: 20.0%
- Not Asked: 0.0%
- No: 3.3%

# ADDITIONAL THOUGHTS

## ADDITIONAL ADVICE, INSIGHTS, POTENTIAL SPEED BUMPS:

- **More communication and engagement** is needed beyond those directly served by the organizations.
- Need to consult with leadership from the **Department for Aging and Independent Living** (DAIL) about regulations and facility code compliance in order to continue to qualify for government funding.
- The case for support needs to be **compelling and enthusiastically embraced by both organizations.**
- Quantify the **advantages of the plan** compared to other options for those who need that kind of information.





# **RECOMMENDATIONS & NEXT STEPS**

**FEASIBILITY STUDY  
EXECUTIVE SUMMARY**



# RECOMMENDATIONS

## FEASIBILITY STUDY SUMMARY

Based on our interviews and the findings of the study we believe that the Senior Community Center and the YMCA have the capacity and community support to launch a major capital campaign in the **range of \$4.5M - \$7M.**

## IMPLEMENTATION

Donor engagement at this level is strategic. **It takes time to secure six and seven-figure commitments.** Most of the top prospects identified in this study will need additional cultivation.



# POTENTIAL REVENUE SOURCES

Individual/Corp/Foundation (Interviewed)	\$2,405,000	to	\$4,135,000
Individual/Corp/Foundation (Not interviewed but suggested by others)	\$750,000	to	\$1,000,000
Alternative Sources (govt. funds)	\$750,000	to	\$1,000,000
Grants/Foundations (not interviewed but suggested by others)	\$500,000	to	\$750,000
Community	\$150,000	to	\$200,000
<b>Total</b>	<b>\$4,555,000</b>	<b>to</b>	<b>\$7,085,000</b>





# POTENTIAL SOURCES OF FUNDING

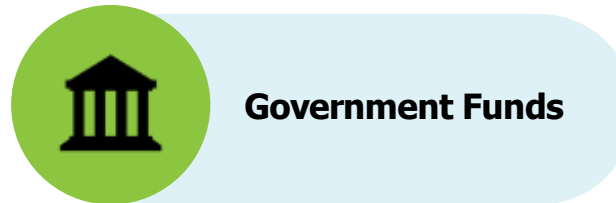
Project Goal \$8,000,000



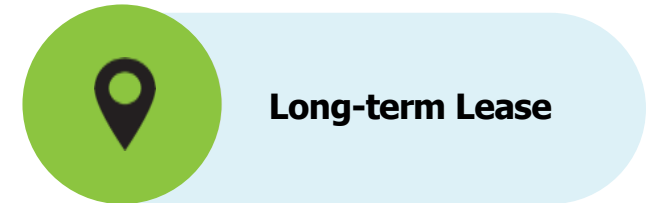
**Local Private  
Philanthropy**



**Reasonable Debt**



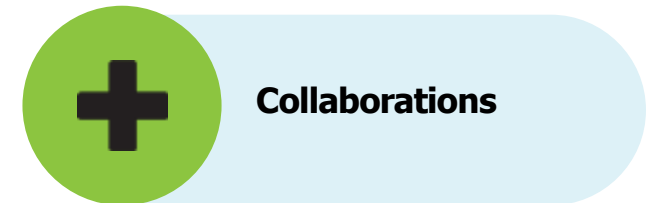
**Government Funds**



**Long-term Lease**



**Foundation Grants**



**Collaborations**

# Recommendations @ 30,000 Feet

**LEADERSHIP:** Leadership is everything – Don't Settle



**CASE:** Clear, concise and compelling – lift up the WHY and So What?



**PROSPECTS:** Funding from all sources. Focus on Top 20/Next 30



**PLAN:** Identify-Connect-Educate-Invite

# RECOMMENDATIONS

## LEADERSHIP

**Leadership is Everything.** Seek leadership that brings **Interest, Access, Influence and Affluence.**

- **Leadership Cabinet:** Recruit additional community leaders with strong connections who can garner community buy-in and significant financial support.
- People want to see **energy and enthusiasm** for the project from staff and boards.
- People want to be part of something that is great. **Early giving** from trusted lead donors will inspire others to join in.
- **Secure/formalize the partnership** so it is easily explained and understood.
- **Clarify** organizational staff **roles and responsibilities** related to campaign execution.



# RECOMMENDATIONS

## CASE

- The case must communicate how local capital investment translates into social investment in the community. **It's not about a building, it's about building people.**
- Leverage each organization's **distinctive image** and their **collective commitment** to inclusion for all.
- A positioning campaign must be developed and executed lifting the unique qualities each of the organization brings to the **collaboration** which in turn **benefits the entire community.**



# RECOMMENDATIONS

## CASE

The case must focus on the **WHY and the So What**: why will this investment make a difference and what will change as a result?

- Develop a case that is less about “saving the organizations” and more about what will the **community gain**.
- Need one compelling vision for the plan.  $1 + 1 = 3$ . **What is the “3”?**
- Articulate what the **community needs** that the organizations will be better able to address with the planned facility.
- Reconfiguration and renovation of space should **highlight safety, accessibility, efficiency, and ease of use**.
- Update **proforma budgets** for each organization to demonstrate sustainability.





# RECOMMENDATIONS

## PROSPECTS

- Continue to engage with “**Companies for Childcare**” to explore potential support from businesses in need of childcare for employees. Further research **Kentucky General Assembly** tax incentive program for businesses supporting childcare needs.
- Create opportunities to **share the plan with community leaders** to generate increased visibility and additional support.
- **Cultivate** families of current and former Senior Center participants.
- Stay current on potential future **COVID funding**.
- Keep **Community Foundation** Director informed as she is willing to share project with potential donors.
- Develop specific donor engagement plans for your **Top 20/Next 30 prospects** in order to further cultivate those with the capacity to make significant gifts.



# RECOMMENDATIONS PLAN

- Solidify **project scope, costs and timeline**.
- Involve the **Department for Aging and Independent Living** (DAIL) for approval of the plan.
- **Re-engage key study participants** with a “report to the community” document to review assessment findings, discuss next steps in their engagement and communicate next steps in the process.
- Develop a diverse and attractive list of **naming opportunities** for all component projects.
- Develop and execute a **positioning campaign** in support this collaborative venture.
- Engage in a **3-month capital readiness** effort further defining:
  - **Case** for support and **community benefits**
  - **Facility design**, cost and considerations
  - Future **YMCA leadership**
  - **City and County support** parameters and timeline.



# NEXT STEPS

- Assign a volunteer task force to **further assess study findings and recommendations.**
- Consider a **third-party facilitator** to guide boards to final decision on how to move forward (**go/no go**).
- Re-engage key study participants with a **“report to the community”** document to review assessment findings, explore next steps in their engagement and communicate the next phase of the development process.
- Engage in a **3-month capital readiness** to:
  - Further defining the **case for support**
  - Clarify **facility design and costs**
  - Introduce and orientate **new Y leadership**
  - Begin identification of potential **top donor prospects**
  - Further clarify **case for support** including community benefits



# WHAT SAYING YES MEANS. . .



- Up to **50%** of each organization's **ED/CEO** time dedicated to campaign **(18-24 months)**
- **Dedicated administrative support** in each organization dedicated to campaign execution
- **100% board support** at personal stretch levels
- **100% board engagement** opening doors and advocating for the project
- **Shifts in operational responsibilities** as needed to allow the Executive Directors time to focus on the capital campaign
- Engage **Fund Development Counsel** (TBD).
- Dedicated **Volunteer Campaign Leadership Cabinet** (12-15 volunteers)



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# QUESTIONS

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