

Chapter 9: Fundraising

In this chapter you will learn about:

- ✓ Developing a strategic approach to fundraising
- ✓ Resources to assist with fundraising

Introduction

For many governing boards fundraising is not part of the job description. However, if you are a non-profit organization it is a major role for the Board of Directors. Library Boards must ensure the fiscal health of their library and often that means that fundraising is increasingly part of their job description. In difficult economic times fundraising might be essential to maintain programs and services. While visits and circulation typically increase funding usually decreases. When economic times improve fundraising can allow your library to become extraordinary and will assist you in fundraising during other times when the funds are needed to maintain operations.

A recent study¹ funded by the Bill and Melinda Gates Foundation, explored the attitudes and perceptions about library funding in order to evaluate the potential of a large-scale marketing and advocacy campaign to increase public library funding in the U. S. Among the findings were the following:

- Library funding support is only marginally related to library visitation.
- Perceptions of librarians are an important predictor of library funding support.
- Voters who see the library as a 'transformational' force as opposed to an informational source are more likely to increase taxes in its support.

¹. Perceptions of libraries and information resources : a report to the OCLC membership. Principal contributors, Cathy De Rosa ... et al. ; c2005. ; OCLC, ; <http://www.oclc.org/reports/2005perceptions.htm>

With this in mind it is easy to see that fundraising is intertwined with the mission of the library and patron satisfaction and should be part of the overall strategic planning of your library, including circulation, technology, collection and programming policies.

Strategic Approach

By using a strategic approach to fundraising the library board's effectiveness and efficiency will be increased. The strategic approach includes:

- Defining your goals
- Developing your team
- Identifying your stakeholders and evaluating your targets
- Developing your message
- Determining your plan of action
- Evaluation

Defining Your Goals

Donors will not give to an organization with poorly defined fundraising goals. Start by asking basic questions that will help your Board decide why and how funds will be raised.

- What are we trying to accomplish?
- How much money is needed?
- Is it for a single use or an on-going need? (Capital, Programming, Operating Expenses, or Endowment)
- What is the time frame in which the funds are to be raised?
- How will the library distinguish itself from other fundraisers?
- Who are potential donors?

Once these questions are answered the Board or the Development Committee should put the goals in writing, making sure each has the following components:

- **SPECIFIC:** Describes what you want to accomplish with as much detail as possible.
- **MEASUREABLE:** Describes your goal in terms that can be clearly evaluated.
- **REALISTIC:** Make sure the Board is capable of reaching the goal.

- **STATED COMPLETION DATE:** Determine an end date, break longer term goals into shorter objectives with completion dates.
- **RESPONSIBILITY:** Determine which Board, Staff or volunteers will be responsible for completing each specific goal and/or objective.

Sample of written Goals and Objectives:

Goal/Objective	Time Line	Committee	Completed
1) Fundraising needed to complete the 2012 expansion.			
a) Assess plans and determine exact amount needed.	March 2010	Development/ Building Committee	
b) Establish a detailed plan for completing fundraising that includes a time-line and forecast of funding.	April 2010	Development	
c) Develop and Send Community Mailer.	May 2010	Development	
d) Create a list of Potential Grants with application information including dates and contact information.	June 2010	Grants	

Developing your Team

To be successful at your fundraising the Board will need to have the right people on the team. It starts with leadership of the committee. Below are some characteristics of successful fundraising chairperson:

- Goal and task-oriented
- Strong attention to detail
- Organized and able to meet deadlines
- Leadership skills

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- A positive attitude—someone who believes that goals can be accomplished
- Able to recruit committee members and work with library director.
- Good Communication skills—oral and written.
- Ability to make the necessary time commitment.

Once the leader has been determined, the team should be appointed. Each Board must follow the By-laws and Town/City Charter for your individual Library in determining who is eligible for serving on your Development Committee. If it is possible going outside the Board for volunteers may make it easier to find the skills you will need on the committee. In addition, recruiting volunteers from throughout your community will increase the circle of influence. That is, members from outside the normal list of those that work with the library will open up new opportunities available for fundraising. Below are some additional characteristics and responsibilities to consider:

Fundraising Committee Characteristics:

- Well versed in the library's Mission and current fundraising goals
- Able to coordinate with library staff to plan, execute, complete and evaluate fundraising activities and special events
- Able to identify and cultivate potential donor opportunities
- Able to make the time commitment to attend meetings, events, and community outreach functions
- Able and willing to ask for donations
- Willing to contribute

Identifying your stake holders and evaluating your Community / Audience

Evaluating the community will give information on sources of funding and may provide direction for fundraising activities. This information is also useful for long range planning and programming. Begin with a simple demographic analysis that would include, population, number of households, income per household, number of students, education level, age break down, number of tax payers, lists of businesses, and percentage of library card holders (active/inactive). Much of this data is available at www.census.gov. In addition the town clerk's office and the local board of education can also provide additional information. Once you have a basic knowledge of the demographics of your community, you can develop your plan using this information. Individuals give money to organizations that do something of interest to them. Make note of interests and trends. Statistical information that help tell your library story may be found at: <http://www.ctstatelibrary.org/dld/pages/library-statistics-connec>

Developing your message

The core message is dependent on your goals and your audience, which have already been determined. All team members should know and understand the message which can be fine-tuned for different groups. The following may be included in the message:

- What will be accomplished with the funds raised?
- Why it is important to the community/audience. That is, why is it important to the person receiving the message?
- What is the impact if the goal is not achieved?

Some organizations develop a Case for Support. This includes all the reasons that a potential donor may have for giving to your library.

Determine your plan of action

After completing the definition of goals, developing your team, indentifying your stakeholders/evaluating your targets, and developing your message, it is time to execute the plan. Strong leadership and good time management are needed to move forward at this point. Many committees do well with the planning and evaluating phases but struggle with taking action. The action steps are called the objectives. Return to your Goal Setting worksheet and add specific objectives/tasks that will help you meet each goal. The development committee should charge specific individuals with specific objectives that are to be completed within a certain time frame.

The development committee may want to set up the following sub-committees to assist with the division of tasks:

- Personal Solicitations. This sub-committee will ask individuals for donations. All board and committee members should be asked if they have personal connections to those targeted for personal solicitations. They may not be comfortable making “the ask” but can provide an introduction.
- Grants. This sub-committee will research and apply for grants from government entities and private foundations.
- Events. This sub-committee is responsible for events ranging from dinner/dance with silent auction to plant sales. This committee should be working with the Friends of the Library to coordinate activities. The public will not easily distinguish between the groups.

These sub-committees should meet regularly and review goals/objectives and time frames. Each sub-committee should have a regular meeting schedule. Each sub-committee member should leave with a task list to be completed by the next meeting. The sub-committee should hold each member accountable for completing these tasks. An example of this is to add a task list to meeting minutes; which should be completed and distributed to each member within a few days of the meeting.

DURING A SOLICITATION VISIT TO A POTENTIAL DONOR, BE SURE TO:

1. Ask for the gift.
2. Ask for a large enough gift.
3. Listen-avoid talking too much.
4. Determine why this individual is interested in giving.
5. Ask intelligent and considerate questions.
6. Emphasize benefits that giving to the library will bring the donor.
7. Be flexible by offering alternative ways of giving.
8. Have prearranged signals between visiting team members.
9. Ask for the gift toward the end, not at the beginning.
10. Remain silent after asking for the gift.

Source: Massachusetts Public Library Trustees Handbook

Evaluation—Measuring Success

The ultimate measure of any fundraising effort is whether the money needed has been raised. However, regular evaluation will assist the Development Committee to meet the intended objectives during the process. There are a number of ways to successfully evaluate development activities:

- **Events/Meeting Summary:** After each event or meeting with a potential donor identify what worked and what could be improved.
- **Goals/Objectives checklist:** Determine if the you are meeting the goals in the time frame that has set. Then ask why. Why are we accomplishing certain goals and can we apply these successes to areas that may not be working as well.
- **Financial Review:** Determine what is being spent on fundraising activities and what the return of these activities is. Activities that cost a lot and do not contribute significantly to the end goal must be re-evaluated, re-designed or discontinued.
- **Committee/Member Review:** Determine if committee members consistently completed tasks, contributed to the committee, and had the resources needed. Be honest. Do you need more or fewer members? Can tasks be re-aligned for better success?

Resources

General Fundraising

- Simone Joyaux. Provides information on fund development, board and organizational development, and strategic planning.
Simonejoyaux.com
- ALA Frontline Fundraising Toolkit. The guide covers the basics of annual funds, memorials and tributes, online giving and planned giving. It will also teach you how to deepen relationships with your donors and move your donors from being one-time givers to long-term library supporters.
<http://www.ala.org/advocacy/advleg/frontlinefundraising>
- www.afpnet.org: The Association of Fundraising Professionals. Click on the Resource Tab. CT Chapter, contact Debbie Morelli at debbie@sobon.net.

Grants

- Grant information from the Connecticut State Library including federal, state and private grants. Includes an "Additional Grants" blog.
<http://www.ctstatelibrary.org/dld/pages/grants-and-reimbursements>
- Federal Government Grants Grants.gov
- The Catalog of Federal Domestic Assistance, searchable full-text on the Web is the primary source of information on federal grants and nonfinancial assistance programs. <http://www.cfda.gov>
- FirstGov for Nonprofits, portal for nonprofit organizations to information about federal grants, loans, and other assistance.
www.firstgov.gov/Business/Nonprofit.shtml#grants
- Foundation Center This gateway presents information about the grant seeking process, private funding sources (including national, state, community, and corporate foundations), guidelines on writing a grants proposal, addresses of state libraries with grants reference collections, and links to other useful Internet websites. www.foundationcenter.org