Beyond Book Sales

The Complete Guide to Raising Real Money for Your Library

EDITED BY SUSAN DOWD

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Beyond Book Sales

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The Complete Guide to **Raising Real Money** for Your Library

EDITED BY SUSAN DOWD

for Library Strategies
A Consulting Group of
The Friends of the Saint Paul Public Library

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contents

Foreword by Karin Slaughter / *xiii*

Preface: Welcome to Library Fund-Raising / *xv*

PART ONE Focus on Fund-Raising — Fund-amentals for Libraries

Chapter 1 **Libraries Need Fund-Raising More Than Ever** **3**

Library Use Is Increasing / 3

Libraries Matter / 5

References / 6

Chapter 2 **Four Reasons Why Now Is a Good Time for Library Fund-Raising** **9**

There Are More Ways Than Ever to Connect with Donors / 9

The Media Has Taken an Interest in Libraries / 13

Fund-Raising Has Become Part of Today's Library Landscape / 14

Libraries Have a Strong Pool of Volunteers to Help Raise Funds / 15

References / 16

www.alastore.ala.org

Chapter 3 **Private Fund-Raising Is a Natural for Libraries** 17

The Value of Libraries / 19

Library Donors Understand the Value of Libraries to Their Communities / 20

Closing the Circle / 22

References / 23

Chapter 4 **Twelve Must-Know Facts about Library Fund-Raising** 25

Effective Fund-Raising Is about Relationships First, Money Second / 25

A Clear Case for Support and Strong, Consistent Messages Are Crucial / 26

To Value the Library Is Not Enough / 27

Libraries Have Both an Intellectual and Emotional Appeal to Donors / 27

Everyone on Your Staff Plays a Role in Fund-Raising / 28

A Strong Fund-Raising Committee or Board Makes Strong Connections / 29

Most Donors Are People, Not Institutions / 30

Your Largest Donors May Not Be Library Users / 30

Corporate Philanthropy Is about More Than Altruism / 31

Advocacy and Fund-Raising Go Hand-in-Hand / 32

Fund-Raising Is a Year-Round Activity / 32

Saying "Thank You" Matters / 33

Reference / 33

Chapter 5 **Who Can Help with Fund-Raising?** 35

Finding Fund-Raising Volunteers / 35

Library Friends / 36

www.alastore.ala.org

Library Foundation / 37

Library Fund-Raising Committee / 39

Library Staff / 40

Library Trustees / 41

Consultants / 41

Chapter 6 **Ready, Set, Go!** 43

Your Library's Strengths and Challenges / 43

Your Library's Current Fund-Raising Activities / 45

Your Library's Fund-Raising Plan / 46

Evaluating Your Fund-Raising Activities / 49

Chapter 7 **Thanking, Honoring, and Nurturing Your Donors . . . and Keeping Track of Them** 51

Thanking Your Donors / 51

Recognizing and Honoring Your Donors / 54

Nurturing Your Donors / 56

Keeping Track of Your Donors / 58

Chapter 8 **The Role of Marketing and Public Relations in Library Fund-Raising** 61

What Is the Difference between Marketing and Public Relations? / 62

Online Marketing / 64

Branding and Identity / 67

Media Relations / 67

www.alastore.ala.org

Chapter 9 **Fund-Raising for "the Other 95 Percent" of Your Library's Budget** 69

What Is Advocacy? / 69

The Relationship between Advocacy and Fund-Raising / 70

How to Conduct Advocacy Activities / 71

The Legality of Lobbying and Advocacy / 73

Leveraging Private Funds to Secure Public Funds / 74

PART TWO Roll Up Your Sleeves — Types of Fund-Raising Activities

Chapter 10 **Creating a Culture of Giving through Annual and Special Appeals** 77

Annual Appeals / 78

A Keystone for Your Library's Fund-Raising / 78

Getting Started / 79

Special Appeals / 82

Chapter 11 **Membership Programs** 85

Is a Membership Program Worth Your Effort? / 86

Membership Levels / 88

Selling the Idea of Membership / 88

Chapter 12 **The Gift of Remembrance: Tributes and Memorials** 91

Creating a Tributes and Memorials Brochure / 92

Using and Recognizing Tribute and Memorial Gifts / 93

www.alastore.ala.org

Chapter 13 **The Big Bang: Major Gifts** 95

What Is a Major Gift? / 95

Using Major Gifts / 96

Best Prospects for Major Gifts / 96

Soliciting Major Gifts / 97

Chapter 14 **Leaving a Legacy through Planned Giving** 101

What Is Planned Giving? / 101

Why Is Planned Giving Important to Your Library and to Donors? / 102

Developing a Basic Planned Giving Program / 102

The Most Common Planned Giving Methods / 105

Restricted vs. Unrestricted Funds / 107

Notification of a Planned Gift / 108

Chapter 15 **Taking the Fear Out of Fund-Raising Events** 111

What Can a Special Event Do for Your Library? / 111

Types of Fund-Raising Events / 112

Potential Challenges of Special Events / 113

Ten Tips for Conducting a Successful Special Event / 114

Corporate Sponsorship—The Sweet Spot in a Special Event / 116

Planning Your Event / 118

Chapter 16 **Donate Now! Getting Started with Online Giving** 123

Fund-Raising Should Be a Multipronged Effort / 123

Getting Online—DIY or Use a Service / 124

www.alastore.ala.org

DIY Online Giving—Take Baby Steps / 125

Landing Pages / 127

Forms That Follow Function / 128

You're Online. Now What? / 129

References / 130

Chapter 17 **Building Relationships with Businesses for Library Fund-Raising** 131

Sponsorships, Underwriting, and Libraries (No Reason to Cringe) / 131

Why Do Businesses Choose Library Sponsorships? / 133

Finding a Sponsor / 133

Securing a Sponsor / 134

Sponsorship Agreements / 135

Chapter 18 **Securing a Grant (It's Not Just about Writing)** 139

Before You Start Writing / 140

Identifying a Need . . . or Why Should You Receive Grant Funds? / 140

Finding Appropriate Funders . . . or Who Will Support Your Work? / 141

Communicating Effectively . . . or How Do You Build Relationships with Your Funders? / 144

Writing a Great Grant Proposal / 145

Six Basic Components of a Grant Proposal / 146

Drumroll, Please! Grant Proposal Follow-up / 150

www.alastore.ala.org

Chapter 19 **Capital Campaigns Are Not Just for Dreamers** 153

Pre-Campaign—Getting Ready for a Capital Campaign / 154

Pre-Campaign—Conducting a Feasibility Study / 155

Pre-Campaign—Refining Your Campaign and Recruiting Leadership / 157

Your Quiet Phase: Securing Large Lead Gifts / 159

Launching the Public Phase / 161

Wrapping Up / 161

References / 162

Afterword: What Does It All Mean? / 163

Appendix A: Fund-Raising Toolkit / 167

Appendix B: Fund-Raising Gallery / 233

About the Authors / 277

Index / 279

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foreword

LIKE MOST SUCCESSFUL WRITERS, I HAVE PERSONALLY experienced the transformative power of the public library. Several years ago, I became aware of the tragic lack of funding for libraries. I found it shocking that states and municipalities were cutting into the very backbone of our educational infrastructure. I have made it my personal mission to do as much as I can for libraries, whether supporting them through my trust, Save the Libraries, or speaking to the Georgia State House on the importance of a well-read citizenry. I think my experience represents a microcosm of the greater tragedy that has struck library systems all over the world.

In the United States, it is a fact that every dollar spent on public libraries returns $5 to the community. Eighty percent of our incarcerated juveniles are functionally illiterate. Adults who are unable to read are twice as likely to end up in prison as those who can. The math is simple: a child who reads does well in school. A student who does well in school goes to college. A college graduate earns a better living and not only pays more taxes, but has more disposable income to spend on services. They are also more likely to raise children who value education and reading and will in turn follow the education path of their parents. Contrast that with the millions of dollars spent every year on truants and in the juvenile justice system and you'll find an exponential gain in investment by simply keeping the doors of our local libraries open.

This is but one argument I've found helpful in persuading politicians and local businesses to get on board with library fund-raising: by investing in libraries, they are making a fiscally sound choice for their communities. This message is catching on. In the past few years, there has been a great deal of national media attention given to the plight of today's libraries, and this attention has stimulated an uptick in citizens' public support of their libraries. It's difficult to predict, however, whether this attention and goodwill will convert into financial support; and, frankly, simply hoping that it will happen is not a good strategy.

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It's time for libraries large and small to mobilize and focus on serious fund-raising. The consequences of leaving future library budgets in the hands of local public decision-makers alone will sound the death knell for many beloved libraries. It is an unfortunate reality that very few librarians are prepared to be fund-raisers. Even many of those with a master's degree in library science are woefully inexperienced (and often intimidated) by the idea of asking for money. To make matters worse, the day-to-day challenges facing any library director leave precious little time for taking on the additional task of mounting a comprehensive fund-raising effort.

That is why practical, achievable help is at hand in the pages of this book. This new resource will go a long way toward helping every librarian, trustee, Friend of the Library, and library lover avoid the pitfalls of fund-raising. In it you'll find great ideas and specific suggestions for conducting all types of fund-raising activities. You'll learn how to create a plan and identify partners to help you realize your goals. Outlined within this book are clear, concrete tools for implementing the activities you will include in your fund-raising plan. The authors have even included a gallery of examples of fund-raising materials created by libraries that are leading the way in the brave new world of library fund-raising. However you choose to approach this book, do it with the knowledge that whatever plan you implement, you are moving in an essential direction for your library's future.

I can think of no other warriors who are better prepared for battle than the men and women who have historically been on the front lines of literacy. Good luck!

Karin Slaughter

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preface

Welcome to Library Fund-Raising

IN THIS NEW MILLENNIUM, PUBLIC LIBRARIANS, STAFF, and library supporters have reached an overwhelming conclusion: *If public libraries are going to remain strong, people must get creative about funding them.* The old model of banking on public revenues and occasional special funds—and hoping for the best—has gone the way of the card catalog. It has been replaced by purposeful library fund-raising designed to keep existing programs and services strong and provide opportunities for innovation.

Library fund-raising is beautiful in its flexibility. It can be adapted to meet the needs and resources of public libraries and communities of any size, ranging from the smallest library's book or bake sale to huge urban library galas and generous corporate underwriting. It can be simple or sophisticated. It can involve the efforts of a few people or hundreds of people. And the best news of all? It can be sized to fit *your library* perfectly. Regardless of the size or complexity of library fund-raising, it is always about forging and strengthening relationships with the stakeholders in a library's community.

The American Library Association (ALA) believes that private fund-raising is essential for U.S. libraries' future survival. Under the leadership of President Roberta Stevens in 2010–2011, the ALA deepened its resources for private fund-raising, developing the association's first online fund-raising toolkit. The toolkit was added to the ALA website's "Advocacy University" as part of its wide array of online help for libraries seeking advocacy and fund-raising assistance.

Whether your library undertakes only occasional fund-raising projects, or is well along in this effort and wants to become more successful, the chapters that follow are designed to guide you through proven methods of effective library fund-raising. They will help you think about raising dollars in new ways, about going beyond your traditional fund-raising activities. In fact, because so many libraries already know how to do book sales (and other kinds of sales) successfully, this book

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will not include that topic, except to offer one piece of advice: when selling books or other merchandise, determine how you can connect your sale to the other fund-raising that you do. For example, take advantage of the interest in your sale to promote membership in your Friends organization, as well as annual, special, tribute, and memorial giving. Whenever possible, gather names of customers at your sale and add them to your database for future fund-raising solicitation.

Instead of reading more about sales, however, you will learn the importance of developing a strong case for supporting your library, nurturing relationships, employing a broad range of fund-raising techniques (including the Internet), and moving your library's fund-raising from hit-or-miss to solid and successful. Part I, "Focus on Fund-Raising," will help you think through your fund-raising needs and position your library to be a strong partner for private supporters. You'll be guided through the process of assessing your library's strengths and challenges, developing a fund-raising plan, building an effective fund-raising team (perhaps through your current board, Friends group, or Foundation), identifying potential funding partners, and building relationships that benefit both your library *and* its funders. You'll learn to understand what motivates donors to give generously and why thanks and recognition are important. Throughout Part I, you will find paths to the "Fund-Raising Toolkit" where there are easy-to-use tools that break down new challenges into manageable tasks.

In Part II, "Roll Up Your Sleeves," you will find a wealth of good advice and more practical tools for a wide range of fund-raising activities, from the simplest annual fund to the grandest gala. If you have a small annual fund effort that needs improvement, or want to begin an annual Fund-Raising campaign, start here. If you have ever considered soliciting memorial, tribute, or major gifts—or if you know that planned giving (such as gifts made through a will) is important but don't know where to begin—there are several chapters that cover these in detail. If you want to identify opportunities to partner with businesses (as library sponsors or underwriters) and to apply for grants from corporations and foundations, this book can make both of these feel easy and natural. If your library is in serious need of capital improvements, but you find the thought of raising large sums of money through a capital campaign terrifying, *Beyond Book Sales: The Complete Guide to Raising Real Money for Your Library* will hold your hand through every step of that multi-year process. If you feel daunted by online fund-raising, you can learn how to adapt your website and utilize social networks to use the Web effectively for library fund-raising. If you believe that everyone loves a party, library fund-raising events can run the gamut from punch and cookies to black-tie galas with best-selling authors. Your library's special event "sweet spot" is somewhere along that spectrum, and this book will help you find it for maximum results.

Regardless of your level of experience in library fund-raising, you will finish this book with fresh ideas and an eagerness to roll up your sleeves and start raising dollars for your library.

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Library Strategies is a consulting group of The Friends of The Saint Paul Public Library, created in response to increasing requests for services from libraries and library organizations. The mission of Library Strategies is to provide the highest-quality consulting services to support libraries and all library organizations. Our consultants are both leaders in the library community and outstanding specialists in other fields who offer a wide range of practical skills and decades of successful experience.

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PART ONE

Focus on Fund-Raising—Fund-amentals for Libraries

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1

Libraries Need Fund-Raising More Than Ever

THIS CHAPTER COULD JUST BE THE SHORTEST IN HISTORY, IN FACT, JUST one word: crisis.

"Budget Cuts Force Charlotte Libraries to Shut Down," "Library Cuts Threaten Research," "Residents Protest Library Cutbacks" are just a few of the many headlines we see with increasing frequency. As cities, counties, and other government branches face budget deficits and struggle with service cutbacks and employee layoffs, libraries (particularly public and school libraries) struggle too. Temporary downturns in funding used to be just that: temporary—something people simply weathered. That old adage, "This too shall pass" was the mantra. That is no longer the case because the foreseeable future appears to be one of permanent fiscal challenge, even crisis, for libraries of all kinds. But this book is not about doom and gloom; it's about what you can do to lift up your library when circumstances combine to bring it down.

The challenges libraries face are not unique. All nonprofit institutions are readjusting their practices and seeking new revenue streams. Creativity and persistence are the buzzwords of today, and there are more opportunities for creativity than ever before. Later chapters of this book will tell you why and how.

Library Use Is Increasing

How much time do you spend thinking about the ways your library matters to your community? Have you ever counted all the hats library staff are asked to wear? Try

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listing them. You might be surprised at how long the list is. In many communities, library use is at an all-time high. It's a well-known fact that library use increases in times of economic stress, and these challenging times confirm that fact just about everywhere. Door counts are up, computers have waiting lists, and people want their libraries to be open longer hours. They're also demanding a broader range of services than ever before. Gone are the days when people went to their library solely to check out books and music. Today, they want their libraries to offer multi-language resources and programs, skill-building classes, help with resumes and job searches, and more. They want libraries to be kids' places, teen places, and meeting places. Today's library staffers are teachers and counselors too.

A report released in 2011 by the Online Computer Library Center (OCLC) found that, in 2010, over three-fourths of Americans used the Internet. Researchers called this group "information consumers." The authors state, "In 2010, 68% of information consumers had a library card. For those Americans economically impacted, that rate was even higher—81%. Information consumers who have experienced a job impact were not just getting library cards at greater rates; they were using the library for more services and more often in 2010. And their perception of library value was significantly [higher] than those not impacted" (OCLC 2011, 5).

In 2009, the American Library Association published a report titled *The Condition of U.S. Libraries: Trends 1999–2009*. It chronicles library use, comparing 2006 and 2009 data. Researchers found that library use has increased between 2006 and 2009.

In 2011, a Harris telephone survey of 1,012 adults over age 18 found that nearly *two-thirds of Americans reported using their public library, either in person, by telephone, or computer in the past year.*

25.4 million Americans in 2009 reported using their public library more than 20 times in the last year, up *25 percent* (from 20.3 million households) in 2006.

The average number of in-person public library visits *rose 40 percent* from 9.1 per year in 2006 to 12.7 per year in 2009.

Use of the public library by computer (from home, work, or school) *doubled* from 2006 to 2009 (6 times per year, *up* from 2.9 times in 2006).

(ALA Office for Research and Statistics, *The Condition of U.S. Libraries: Trends 1999–2009, 2009*)

Twenty-nine percent (29%) of respondents said their library use *increased* during the past six months.

Among those who have visited the library by computer, one third report *increasing* their public library access by computer over the past six months.

Seventy percent (70%) reported feeling *extremely/very satisfied* with their public library.

When comparing the public library to other tax-supported services, almost one-third of adults (31%) ranked the library *at the top* of the list.

(ALA Report, "January 2011 Harris Poll Quorum Results," 2011)

A similar Harris Poll was conducted in 2010. Comparing the results between 2010 and 2011, Harris Polls revealed that:

> Americans continue to value the importance of services provided by public libraries. In fact, when considering a list of eleven library services, two-thirds or more of the American public consider every factor to be very or somewhat important to them personally, surpassing the proportions in the 2010 study. The most highly valued services pertain to the provision of free information and services that promote education and lifelong learning.

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More than nine in ten Americans (93%) believe that it is very important or somewhat important that library services are free, representing an increase of two percentage points from 2010.

Similar proportions place great value in the library's provision of information for school and work (91%, up five percentage points), as well as the fact that the library provides a place for lifelong learning (90%, up three percentage points), and that the library enhances one's education (89%, up five percentage points).

Eighty-four percent of adults consider it very or somewhat important that the library serves as a community center, is a source of cultural programs and activities (83%, up four percentage points from a year earlier), and provides computer access, training, and support (83%, up seven percentage points).

Three-quarters of Americans consider it very or somewhat important that the library provides health information (75%, up two percentage points) and financial information (75%, up six percentage points) that is accurate and up-to-date.

(ALA News and Press Center, *The State of America's Libraries, 2011.* www.ala.org/news/mediapresscenter/americaslibraries/publiclibraries.)

Libraries Matter

It's clear that, as the gap between rich and poor and the resulting "digital divide" continues to widen, more people than ever before must rely on the library for important resources—particularly computers. State and local governments continue to cut costs by requiring individuals to access their services *online,* and people flock to their libraries for this purpose. Without a computer, it's nearly impossible to apply for government assistance, register for school, or look for work.

Computers are essential for social contact today. E-mail and social networking are two of the most important ways we connect to one another in our modern world. If you don't own a computer, or if you can't access one from work or school, the library is the place you go to use one. Even if you do have access to a computer, if it doesn't offer high-speed Internet service, you're not likely to use it if you have another alternative.

Words to Know

Digital divide refers to the gap between people who have access to computers and digital information and those with limited or no access.

All this technology, however, can also isolate us. When everyone is in his or her own private world—chatting, texting, e-mailing, tweeting, and posting on others' Facebook walls—face-to-face social interaction becomes less frequent. The library provides "people space" where individuals can interact with others in story times, book clubs, classes, teen groups, and senior activities. The library has been described as "the community's living room," and that is a very good description of the function it serves for many people.

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Libraries also matter to the economic health of their communities. They are partners in economic development, providing resources to small businesses and other community organizations and serving as the go-to place for employment searches. Many of the individuals walking into the library to look for work have never before sought employment using a computer. Many have limited English skills or have never written a resume. Many are people who haven't looked for work in decades because they thought their jobs were secure. Without the library—and librarians who can provide personal assistance—the community would face huge challenges in serving this population of job seekers, and local businesses would face longer periods of time with unfilled jobs.

A study published in March 2009 by Library Research Service looked at eight public libraries representing geographically, economically, and demographically diverse regions of Colorado. Using these libraries, researchers quantified the return on investment (ROI) to taxpayers for monies invested in public libraries. For most of the libraries participating in the study *the ROI was five to one—that is, for every $1.00 spent on public libraries, $5.00 of value was realized by taxpayers* (Steffen et al. 2009, v). An ROI study published in a February 2011 issue of *Library Leadership & Management* found similar results. Its author states, "The use of Return on Investment studies in a library setting have produced ROI numbers that are quite variable, although many seem to group in the *$4 to $6* of benefits for each dollar spent by the library" (Matthews 2011, 11).

Words to Know

Return on investment (or *ROI*) is a cost analysis process that measures the cost of a program or service versus the financial return realized by that program or service.

As school library services are cut back and even eliminated in some school systems (an action once thought incomprehensible), parents, teachers, and students rely more heavily on public libraries than ever before. Libraries are the lifeblood of learning. They are essential for students at *all* levels, and they're the only place where many preschoolers can obtain the skills they need for school readiness. The library provides young children with opportunities to build literacy abilities they'll carry with them into school—and into life.

The conclusion is clear: libraries of all kinds are more utilized and more important than ever today. For libraries to survive, alternate means of funding must be sought, and the clock is ticking.

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www.alastore.ala.org

index

A

acknowledgment of gifts, 202–203
Adopt-a-Summer-Reader donation card (James V. Brown Library), 241
Advancing Our Libraries: The Legal Opportunities and Limits for Nonprofit Lobbying (Guy), 187–190
advocacy
  defined, 32
  fund-raising and, relationship between, 70–71
  library director's involvement in, 71–72
  lobbying, 73–74
  as ongoing activity, 72
  overview, 32, 69–70
  person to communicate advocacy message, importance of, 71
  personal meetings with elected officials, 72
  platform, 72
  sample schedule, 73
  as structured activity, 71
  tips for, 71–73
Advocacy University (ALA website), xv, 14
advocates
  connecting with, methods of, 9–10
  volunteers as, 16, 40
agreements, sponsorship, 135–136
all things to all people, libraries striving to be, 19
All You Need Is Love . . . card (Friends of the Saint Paul Public Library), 264–265
All You Need Is Love . . . envelope (Friends of the Saint Paul Public Library), 266
American Library Association (ALA), xv, 14, 142
American Marketing Association (AMA), 62
anchoring communities, library's role of, 19
annual appeals
  brainstorming session for, 79–80
  flexibility offered by, 79
  Internet, using, 80
  as keystone for your library's fund-raising, 78–79
  memberships dues and, 87
  overview, 78
  remittance (donation) card and envelope, 80, 81
  solicitation letter, 80–82, 204
  thanking donors, 80, 81
  tips for, 81
  tracking donations, 80
  visibility offered by, 78–79
annual fund brochure (James V. Brown Library), 234–235
annuities, 107
anonymous gifts, 202
appraisals of gifts, 192
"Are We Ready?" test, 225
articles of incorporation, writing, 169
ask
  defined, 28
  for donations, 27
  for major gifts, 98–99
assessing your library's strengths and challenges
  community, understanding your library's, 43–44
  costs, estimating, 45
  needs of community, ways library currently addresses, 44
  overview, 43
  prioritizing needs, 45
  public funds and private funds, when to use, 45
  unmet service and resource needs, identifying, 44–45
  worksheet, 179
Associate with the Best brochure (Bayport Public Library Foundation), 259–260
attachments to grant proposals, 148–149
attributes of major donors, 31
AViD (Authors Visiting in Des Moines)—Des Moines, Iowa, 207

B

Baby Boomers
  connecting with, 9–10
  as volunteers, 15
badges, 126
Bayport Public Library Foundation
  Associate with the Best brochure, 259–260
  Girls Night Out card, 271
  Love Your Library brochure, 249–250
  Love Your Library reply card, 251
beneficiary, 106
beneficiary designations, 106
bequests/wills, 105, 197–198
blogging
  donations solicited through, 11
  overview, 11
  raising awareness of your library through, 65–66
board. *See* committee or board

www.alastore.ala.org

board members
criteria for selection of, 175
expectations of, 175–176
job description template, 175–176
recruiting, 38–39
responsibilities of, 175
special events and, 112
Board of Trustees, 29, 35, 41
Book Endowment brochure (James V. Brown Library), 242–243
book endowments, 94
book lovers as volunteers, avoiding, 36
bookmark (Friends of the Saint Paul Public Library), 254
BookMarks Auction (Iowa City UNESCO City of Literature), 275
BOOKMARKS (BookArt of Johnson County)—Iowa City Public Library, Iowa, 207
Books for Branches flyer (Seattle Public Library Foundation), 245, 248
Books for Branches letter (Seattle Public Library Foundation), 246–247
brainstorming session for annual appeals, 79–80
brands/branding
defined, 31
overview, 67
for special events, 115
brochures, for memorials, 92–93
brochures, samples
annual fund brochure (James V. Brown Library), 234–235
Associate with the Best brochure (Bayport Public Library Foundation), 259–260
Book Endowment brochure (James V. Brown Library), 242–243
Honor Someone Extraordinary! brochure (Friends of the Saint Paul Public Library), 262–263
Join the Friends brochure (Friends of the Saint Paul Public Library), 256–257
Love Your Library brochure (Bayport Public Library Foundation), 249–250
Make a Planned Gift Today brochure (Friends of the Saint Paul Public Library), 269–270
Remember a Loved One brochure (Friends of the Saint Paul Public Library), 267–268
Richland County Public Library Foundation brochure, 252–253
Staff Join Free brochure (Friends of the Saint Paul Public Library), 258
brochures, for tributes, 92–93
budget
grant proposals, budget and budget narrative section of, 148, 223
for Library Foundation, 170
for special events, 114
business plan for Library Foundation, 170
business sponsorship. See sponsorships
bylaws for Library Foundation, 170

C

CAN-SPAM Act of 2003, 64
candidate endorsements by Friends group, 187
capital campaigns
case presentation, 155–156
case statement, 158
chair, checklist for great, 229
failure of, reasons for, 155
feasibility study for, conducting, 155–157
lead gift phase, 159–160
overview, 60, 153–154
planning for, 154–155
pre-campaign phase, 154–159
public phase, 161
quiet phase, 159–160
refining, 157–159
success of, reasons for, 155
wrapping up, 161–162
capital support grants, 140
Carnegie, Andrew, 17–18
case presentation, 155–156
case statement, 158
cash gifts/checks, 194
Cause, setting up a Facebook, 126
cause-focused organizations, grants from, 142, 143
cause-related marketing, 131–132
celebrities' support for libraries, 14
census data, use of, 13–14
challenge grant, 160
charitable gift annuity, 198
charitable giving, 31
charitable lead trust, 107, 199
charitable remainder annuity trust, 199
charitable remainder trust, 107
charitable remainder unitrust, 198–199
charity, registering Library Foundation as a, 172
checklists
donor database, 185–186
private support sources, 182
for sponsorship, 136
Chicago Public Library, 21
Chronicle of Philanthropy, 94
Churchill, Winston, 27
committee or board
effectiveness of, 29
recruitment worksheet, 174
volunteers as members of, 15
common application form for grant proposals, 146
community
foundations, 94, 142, 143
library as "community's living room," 5
understanding your library's, 43–44
volunteers, community and civic leaders as, 36
The Condition of U.S. Libraries: Trends 1999—2009 (ALA report), 4, 10
connections
of Board of Trustees, 41
leveraging politically active people's, 71
consultants
defined, 41
for feasibility study, 156–157
gift table, development of, 157
help from, list of ways for, 42
memorandum of agreement (sample), 177–178
overview, 41–42
A Consumers Guide to Low Cost Donor Management Systems, 58
core services, 21
corporate foundations, grants from, 143
corporate giving, grants as method of, 143

www.alastore.ala.org

corporate sponsorship. See sponsorships
corporations, charitable giving by, 31
cover letters for grant proposals, 149
cover sheets for grant proposals, 149
credit card gifts, 194
credit for matching gift money, 202
crisis, libraries in, 3–6
cross-section of communities, libraries serving, 19
current gifts, 194–197
current library fund-raising activities worksheet, 180
current operating funds, 200

D

data privacy, 203
date of gift, determining, 53
debriefing session for special events, 120–121
deferred giving. See planned giving
Delicious, 66
Dempsey, Mary, 21
Development Planning Committee, 193–194
Dewey After Hours & the Book Lovers Ball—Denver Public Library, Colorado, 207
Digg, 66
digital divide, 5, 13
Dine Out for a Cause—Del Ray Public Library, Florida, 207
direct lobbying, 73–74
displaying donors' names, 55
DONATE button, 10–11
donations. *See also* specific types of donations
  accepted through vendors for online fund-raising, 124–125, 126
  accepted through your own merchant account for online fund-raising, 124–127
  from Board of Trustees, 41
  remittance (donation) card and envelope for annual appeals, 80, 81
donor database, 48, 58–59
donor database checklist, 185–186
donors
  connecting with, methods of, 9–10
  individual, 30
  major, 21–22, 30–31
  nurturing, 56–57
  reasons people donate, 20–21
  recognition of, 54–56, 162, 202
  understanding of value of libraries, 20–22
  volunteers as, 40

E

e-mail
  list, building and managing, 129
  thanking your donors with, 53
e-mail blasts
  donations solicited through, 11
  overview, 11, 64
economic health of community, importance of library to, 6
effectiveness of committee or board, 29
80-20 Rule, 22, 30
EIN (Employer Identification Number), applying for, 170–171
embarrassment when asking for major gifts, 99
endowment campaigns, 154
endowments, 94, 200–202
enhancement of library services, private funding used for, 21, 70
evaluation of fund-raising activities
  overview, 49
  worksheet, 183
event sponsorship tracking form (sample), 210
everyday library landscape, fund-raising as part of, 14
experienced fund-raisers as volunteers, 40

F

Facebook, 12, 66, 126
failure
  of capital campaigns, 155
  major gifts, when asking for, 99
family foundations, grants from, 142, 143
feasibility study for capital campaigns, conducting, 155–157
fees for online fund-raising, 124–125
Firstgiving.com, 126
fiscal agents, 149
501(c)(3) nonprofit organizations, 37, 73, 169–173. *See also* Library Foundation
flexibility offered by annual appeals, 79
follow-up after receiving grants, 150–151
Foundation Directory Online, 141
foundations, 37. *See also* Library Foundation
  community foundations, 94, 142, 143
  corporate foundations, 143
  family foundations, 142, 143
free media placement, 67–68
friend-raising, 45–46
Friends group
  candidate endorsements, 187
  legal issues, 187–190
  legislative advocacy, 187–189
  Library Foundation: compared, 37; merging with, 38
  lobbying, legal requirements governing, 187–190
  overview, 36
Friends of the Saint Paul Public Library
  All You Need Is Love . . . card, 264–265
  All You Need Is Love . . . envelope, 266
  bookmark, 254
  Honor Someone Extraordinary! brochure, 262–263
  Join the Friends brochure, 256–257
  Make a Planned Gift Today brochure, 269–270
  Opus & Olives invitation, 273–274
  Opus & Olives Save the Date card, 272
  Remember a Loved One brochure, 267–268
  Staff Join Free brochure, 258
  Stock the Stacks bookplate, 237
  Stock the Stacks envelope, 237
  Stock the Stacks letter, 236
  Stock the Stacks reply card, 238
  When the Tough Get Going poster, 261
  XL R8 Summer Reading Program bookmark, 240
  XL R8 Summer Reading Program letter, 239
  Year-end reply card, 255
front line staff, 40–41
fulfillment, 136

www.alastore.ala.org

fund-raising committee or board. See committee or board
fund-raising defined, 26

G

Gates, Bill, 22
Gates, Melinda, 22
Gates Foundation, 22
Gen X
  connecting with, 9–10
  memberships not appealing to, 87
Gen Y/Millennials
  connecting with, 9–10
  memberships not appealing to, 87
general operating grants, 140
gift acceptance policy (sample)
  acknowledgment of gifts, 202–203
  anonymous gifts, 202
  cash gifts/checks, 194
  charitable gift annuity, 198
  charitable lead trust, 199
  charitable remainder annuity trust, 199
  charitable remainder unitrust, 198–199
  corporate partnership, 200
  credit card gifts, 194
  credit for matching gift money, 202
  current gifts, 194–197
  current operating funds, 200
  data privacy, 203
  Development Planning Committee's role in, 193–194
  donor recognition, 202
  endowment funds, 200–202
  gift designations/restrictions, 200–202
  honor and memorial gifts, 197
  life insurance, 199
  matching gifts, 194
  methods of giving, 194–200
  naming of library buildings and interior spaces, 203
  overview, 193
  planned/deferred gifts, 197–199
  planned gifts, 202
  real property, 195–197
  recognition of gifts, 202
  remainder interest–personal residence, 198
  required minimum gift, 201
  restricted donor-directed funds, 197
  restricted funds, 200, 201
  securities as gifts, 195
  stewardship and acknowledgments, 202–203
  tangible personal property, 195
  unrestricted funds, 200, 201
  wills/bequests, 197–198
gift table (sample), 226
gifts. *See also* gift acceptance policy (sample)
  acceptance policy, 78
  appraisals of, 192
  in-kind donations as, 191
  legal/professional fees for completion of, 192
  liquid assets as, 191
  real estate as, 191
  tangible personal property as, 191
Girls Night Out card (Bayport Public Library Foundation), 271
Giving Pyramid, 97
goals and objectives section of grant proposals, 147
Google Account, 126
Google Analytics, 128
Google Checkout, 126
Google Grant, 126
government grants, 142, 143
grant project concept worksheet, 216–217
grant proposals
  attachments to, 148–149
  budget and budget narrative section of, 148, 223
  common application form, 146
  components of, 146–149
  cover letters, 149, 224
  cover sheets, 149
  goals and objectives section of, 147
  letter of inquiry (LOI), 145–146
  measurement and evaluation section of, 148, 222–223
  need or situation section of, 146–147, 220
  organization information section of, 146, 219–220
  overview, 139, 144
  personnel information included in, 147
  rejection of, 150, 151
  requirements for, 149
  sample, 219–223
  solution or activities section of, 147, 221–222
  timeline included in, 147
  tips for, 147
  volunteering to serve as reviewer for funding organization to improve your, 147
  writing, 145–149
grant writers, 16, 144
grants
  before applying for, 140
  capital support, 140
  from cause-focused organizations, 142, 143
  from community foundations, 142, 143
  from corporate foundations, 143
  from corporate giving, 143
  from family foundations, 142, 143
  finding funders, 141–144
  follow-up after receiving, 150–151
  general operating, 140
  from government units, 142, 143
  needs, identifying, 140–141
  overview, 139
  program support, 140
  project support, 140
  relationships with funders, building, 144–145
  types of, 140
  types of funders, 142–143
grassroots lobbying, 73–74
Guy, David J., 74, 187, 190

H

hands-on help from volunteers, 40
handwritten note, thanking your donors with, 54
Holmes, Oliver Wendell, 20
honor and memorial gifts, 197
Honor Someone Extraordinary! brochure (Friends of the Saint Paul Public Library), 262–263
honoring your donors. See recognizing and honoring your donors

www.alastore.ala.org

I

Idealware, 58
image of library, special events enhancing, 112
importance of libraries, 5–6
in-kind donations, 36, 135, 144, 191
incorporating as a nonprofit institution, 170
individual donors, 30
information consumers, 4
Institute of Museum and Library Services (IMLS), 142
intellectual and emotional appeal to donors, libraries have both, 27–28
invitations to special donor-only events, 57
Iowa City UNESCO City of Literature (BookMarks Auction), 275
Iowa Foundation DataBook, 141

J

James V. Brown Library
  Adopt-a-Summer-Reader donation card, 241
  annual fund brochure, 234–235
  Book Endowment brochure, 242–243
  Own-a-Day donation card, 244
Join the Friends brochure (Friends of the Saint Paul Public Library), 256–257

L

landing pages, 127–128
Laugh—Del Ray Public Library, Florida, 207
lead gift phase for capital campaigns, 159–160
legal issues
  Friends group, 187–190
  lobbying, 73–74
legal/professional fees for completion of gifts, 192
letter of inquiry (LOI) for grant proposals, 145–146
letter of support (template), 218
levels of membership, 88
library director's involvement in advocacy, 71–72
Library Foundation
  articles of incorporation, writing, 169
  board members, recruiting, 38–39
  business plan and budget, creating, 170
  bylaws, drafting, 170
  charity, registering as a, 172
  EIN (Employer Identification Number), applying for, 170–171
  Friends group: compared, 37; merging with, 38
  how to start a nonprofit 501(c)(3) library foundation, 169–173
  incorporating as a nonprofit institution, 170
  name for, choosing, 169
  overview, 37–38
  sales tax exemption from your state, applying for, 171
  state tax identification number, applying for, 171–172
  tax exempt status, obtaining, 171
library friends. *See* Friends group
Library Leadership & Management, 6
library use, increase in, 3–5
LibraryThing, 12
life insurance as gift, 106, 199
LinkedIn, 66
liquid assets as gifts, 191
Literary Sojourn—Bud Werner Memorial Library (Steamboat Springs, Colorado), 208
lobbying
  defined, 73
  legal requirements governing, 73–74, 187–190
  overview, 73–74
local booksellers as corporate sponsor for special events, 117
Love Your Library brochure (Bayport Public Library Foundation), 249–250
Love Your Library reply card (Bayport Public Library Foundation), 251
LSTA (Library Services and Technology Act), 147

M

major donors
  attributes of, 31
  defined, 30
  overview, 21–22
  prospects, 30–31
major gifts
  asking for, 98–99
  embarrassment when asking for, 99
  failure when asking for, 99
  lead gifts, 159–160
  overview, 95–96
  prospects, 96–97
  rejection when asking for, 99
  soliciting, 97–98
  using, 96
Make a Planned Gift Today brochure (Friends of the Saint Paul Public Library), 269–270
marketing
  branding, 67
  cause-related marketing, 131–132
  online, 64–67
  overview, 62–63
  public relations compared, 62–63
  taglines, 67
matching gifts/grants, 160, 194
Mature/Traditionalists, connecting with, 9–10
measurement and evaluation section of grant proposals, 148, 222–223
media interest in libraries, 13–14
media relations, 67–68
media sponsors for special events, 117
membership cards, 86
membership programs
  advantages of, 86
  disadvantages of, 87
  levels of membership, 88
  overview, 85–86
  persuading people to join, 88
  swag, 86, 88
memorials
  brochure for, creating, 92–93
  donation form for, 92–93
  honor and memorial gifts, 197
  overview, 91
  using and recognizing, 93–94
message of library, clarity and strength of, 26–27
Microsoft Access, 58
Millennials. *See* Gen Y/Millennials
Minnesota Council on Foundations' Guide to Grantmakers, 141

www.alastore.ala.org

mobile-friendly forms for online fund-raising, 129
MySpace, 66

N

naming
  of library buildings and interior spaces, 203
  Library Foundation, 169
  opportunities, 158
  opportunity policy (sample), 227–228
National Committee on Planned Giving, 104
need or situation section of grant proposals, 146–147, 220
network effect, 65
New Mexico Grantmakers' Directory, 141
newsletters, sending, 56
next budget year, raising money for, 46
"Nine Ways to Improve the SEO of Every Website You Design," 10
non-probate assets, 105
nonask contacts, creating opportunities for, 56–57
nurturing your donors
  invitations to special donor-only events, 57
  list of ways for, 57
  newsletters, sending, 56
  overview, 56
  personal touches, 57

O

ongoing activity
  advocacy as, 72
  fund-raising as, 32
Online Computer Library Center (OCLC), 4
online fund-raising
  annual appeals, 80
  campaigns, creating, 129
  donations accepted through vendors, 124–125, 126
  donations accepted through your own merchant account, 124–127
  e-mail list, building and managing, 129
  fees, 124–125
  forms, donation, 128–129
  landing pages, 127–128
  mobile-friendly forms, 129
  overview, 123–124
  PayPal, using, 125–126
  relationships with supporters, developing, 129
  success, measuring your, 130
  volunteer fund-raisers, supporters as, 129
online marketing
  e-mail blasts, 64
  QR (quick response) codes, 64
  with social media, 65–67
Opus & Olives invitation (Friends of the Saint Paul Public Library), 273–274
Opus & Olives (Fine Print & Fine Food)—Saint Paul, Minnesota, 115, 208
Opus & Olives Save the Date card (Friends of the Saint Paul Public Library), 272
organization information section of grant proposals, 146, 219–220
Own-a-Day donation card (James V. Brown Library), 244

P

Pareto, Vilfredo, 30
Partnership for Philanthropic Planning, 104
PayPal, using, 125–126
personalizing
  bookplates, 93–94
  nurturing your donors, personal touches for, 57
  solicitation letters, 81–82
personnel information included in grant proposals, 147
philanthropy, 18, 31, 85
Phoenix Public Library, 21
phone call, thanking your donors with, 53–54
plan for fund-raising
  overview, 46–49, 181
  worksheet for, 47, 48
planned giving
  advantages of, 102
  annuities, 107
  beneficiary designations, 106
  bequests, 105
  brochure, creating a, 205
  candidates for, 103
  declaration of intent template, 206
  gift acceptance policy (sample), 197–199, 202
  importance of, 102
  life insurance, 106
  methods for, 105–107
  notification of, 108–109
  overview, 101–102
  probate assets, 105
  program for, developing basic, 102–104
  real estate, 107
  restricted gifts, 107–108
  selecting appropriate gift for, 108
  trusts, 106–107
  unrestricted gifts, 107–108
podcasting, 66
potential donors
  for major gifts, 30–31, 96–97
  for planned giving, 103
  special events creating new pool of, 111
pre-campaign phase of capital campaigns, 154–159
print, recognizing and honoring your donors in, 55
private funds
  and public funding for libraries, partnership of, 17–18, 21, 22, 74
  when to use, 45
probate, 105
probate assets, 105
program support grants, 140
project support grants, 140
promotion of fund-raising by volunteers, 40
public funds
  overview, 69
  private funding and public funding for libraries, partnership of, 17–18, 21, 22, 74
  when to use, 45
public phase of capital campaigns, 161
public relations (PR)
  marketing compared, 62–63
  media relations, 67–68
  overview, 63
  social media, 65–67
publicity for special events, 116
publishing industry, changes in, 13

www.alastore.ala.org

Q

QR (quick response) codes, 64
quiet phase of capital campaigns, 159–160

R

real estate/real property as gift, 107, 191, 195–197
receipts for gifts, 53
recognition of gifts, 202
recognizing and honoring your donors
  for capital campaigns, 162
  by displaying donors' names, 55
  donor recognition events, holding, 55–56
  donor recognition groups, creating, 54–55
  list of ways for, 57
  with meaningful gift, 55
  in print, 55
rejection
  of grant proposals, 150, 151
  major gifts, when asking for, 99
relationships, importance of, 25–26, 163
Remember a Loved One brochure (Friends of the Saint Paul Public Library), 267–268
remittance (donation) card and envelope for annual appeals, 80, 81
required minimum gift, 201
restricted donor-directed funds, 197
restricted funds, 46, 78, 82, 107–108, 200, 201
return on investment (ROI), 6
Richland County Public Library Foundation brochure, 252–253

S

sales tax exemption from your state, applying for, 171
search engine optimization (SEO), 10
Seattle Public Library Foundation
  Books for Branches flyer, 245, 248
  Books for Branches letter, 246–247
securities as gifts, 195
social media
  donations solicited through, 11–12
  list of types of, 65–67
  overview, 65
software
  for e-mail blasts, 64
  for tracking your donors, 58–59
solicitation letters, 80–82
solution or activities section of grant proposals, 147, 221–222
special appeals, 82–83
special events
  challenges of, 113–114
  debriefing session for, 120–121
  list of, 207–208
  mistakes to avoid for, 114
  overview, 111–112
  planning, 118–121
  reasons for conducting, 111–112
  tasks common to, 119
  tips for, 114–116
  tracking event sponsors and guests, 120
  types of, 112–113
spin doctors, 63
sponsorships
  agreements, 135–136, 213–215
  checklist for, 136
  finding, 133–134
  gift acceptance policy (sample), 200
  in-kind items of value to accept in addition to (or in lieu of) cash, 135
  opportunities and benefits, 133, 209
  overview, 131–132
  policy (sample), 211–212
  securing, 134–135
  for special events, 112, 115, 116–118
  why businesses choose library sponsorships, 133
staff
  everyone on staff playing a role in fund-raising, 28–29
  front line, 40–41
  importance of staff in fund-raising efforts, 40–41
Staff Join Free brochure (Friends of the Saint Paul Public Library), 258
state tax identification number, applying for, 171–172
Stevens, Roberta, xv
stewardship and acknowledgments, 202–203
Stock the Stacks bookplate (Friends of the Saint Paul Public Library), 237
Stock the Stacks envelope (Friends of the Saint Paul Public Library), 237
Stock the Stacks letter (Friends of the Saint Paul Public Library), 236
Stock the Stacks reply card (Friends of the Saint Paul Public Library), 238
structured activity, advocacy as, 71
success
  of capital campaigns, 155
  of online fund-raising, 130
swag, 86, 88

T

taglines, 67, 92
tangible personal property, 191, 195
tax exempt status, obtaining, 171
taxable estate, 105
TechSoup, 58–59
telephone calls to donors, 81
thank-you letter
  for grants, 150, 151
  overview, 52–53
  template, 184
thanking your donors
  for annual appeals, 80, 81
  with e-mail, 53
  with handwritten note, 54
  importance of, 33
  list of ways for, 57
  methods for, 52–54
  overview, 33, 51–52
  with phone call, 53–54
  with thank-you letter, 52–53, 150, 151, 184
  with a visit, 54
timeline included in grant proposals, 147
tips
  for advocacy, 71–73
  for annual appeals, 81
  for grant proposals, 147
  for special events, 114–116
  for tribute/memorial brochures, 92

www.alastore.ala.org

toolkit
Advancing Our Libraries: The Legal Opportunities and Limits for Nonprofit Lobbying (Guy), 187–190
annual appeal solicitation letter (sample), 204
"Are We Ready?" test, 225
assessing your library worksheet, 179
board member job description template, 175–176
business sponsorship agreements (sample), 213–215
capital campaign chair, checklist for great, 229
consultant memorandum of agreement (sample), 177–178
corporate sponsorship opportunities and benefits, 209
current library fund-raising activities worksheet, 180
donor database checklist, 185–186
evaluating your fund-raising activities worksheet, 183
event sponsorship tracking form (sample), 210
fund-raising board or committee recruitment worksheet, 174
gift acceptance policy (sample), 193–203
gift table (sample), 226
gifts, determining what constitutes, 191–192
grant project concept worksheet, 216–217
grant proposal (sample), 219–223
grant proposal cover letter (sample), 224
letter of support (template), 218
naming opportunity policy (sample), 227–228
nonprofit 501(c)(3) library foundation, how to start a, 169–173
plan, your library's fund-raising, 181
planned giving brochure, creating a, 205
planned giving declaration of intent template, 206
private support, checklist of sources of, 182
special events, list of, 207–
sponsorship policy (sample), 211–212
thank-you letter (standard) template, 184
touches, 98
tracking
annual appeals donations, 80
donors, 58–59
special event sponsors and guests, 120
tributes
brochure for, creating, 92–93
donation form for, 92–93
overview, 91
using and recognizing, 93–94
trusts, 106–107
tweets, 12
Twitter, 12, 66
2011 donorCentrics Internet and Multichannel Giving Benchmarking Report (Blackbaud), 123

U

unconditional delivery, 53
underserved, libraries serving, 19
underwriting, 131–132
unmet service and resource needs, identifying, 44–45
unrestricted funds, 46, 78, 79, 107–108, 200, 201

V

value of libraries
donors' understanding of, 20–22
overview, 19–20
visibility of library
annual appeals raising, 78–79
in community, 70–71
special events raising, 112
visit, thanking your donors with, 54
volunteers. *See also* Friends group; Library Foundation
as advocates, 16, 40
Baby Boomers as, 15
book lovers as, avoiding, 36
committee or board, as members of fund-raising, 15
community and civic leaders as, 36
as donors, 40
experienced fund-raisers as, 40
finding, 35–36
as grant writers, 16
hands-on help from, 40
as links between library and potential funding sources, 15
overview, 15–16
as promoters, 16, 40
special events and, 112
supporters as, 129

W

website (library)
donations solicited through, 10–11, 128–129
landing pages, 127–128
overview, 10–11
When the Tough Get Going poster (Friends of the Saint Paul Public Library), 261
widgets, 126
Wikipedia, 67
wills/bequests, 105, 197–198
workforce development, library's role in, 13
worksheets
assessing your library worksheet, 179
current library fund-raising activities worksheet, 180
evaluating your fund-raising activities worksheet, 183
fund-raising board or committee recruitment worksheet, 174
fund-raising plan, 47, 48
grant project concept worksheet, 216–217
wrapping up capital campaigns, 161–162
writing grant proposals, 145–149

X

XL R8 Summer Reading Program bookmark (Friends of the Saint Paul Public Library), 240
XL R8 Summer Reading Program letter (Friends of the Saint Paul Public Library), 239

Y

Year-end reply card (Friends of the Saint Paul Public Library), 255
year-round activity, fund-raising as, 32
YouTube, 67

www.alastore.ala.org