

FUNDRAISING FOR YOUR LIBRARY



Ramapo Catskill Library System

presents

FUNDRAISING FOR YOUR LIBRARY – Designing Your Campaign or Strategy 2009

Thursday, April 30 • Ramapo Catskill Library System

Tuesday, May 12 • Suffern Free Library

Tuesday, May 19 • Ethelbert B. Crawford Public Library, Monticello

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FUNDRAISING FOR YOUR LIBRARY

EASY QUESTIONS & HARD ANSWERS

What do you need the money for?

Why do you need the money?

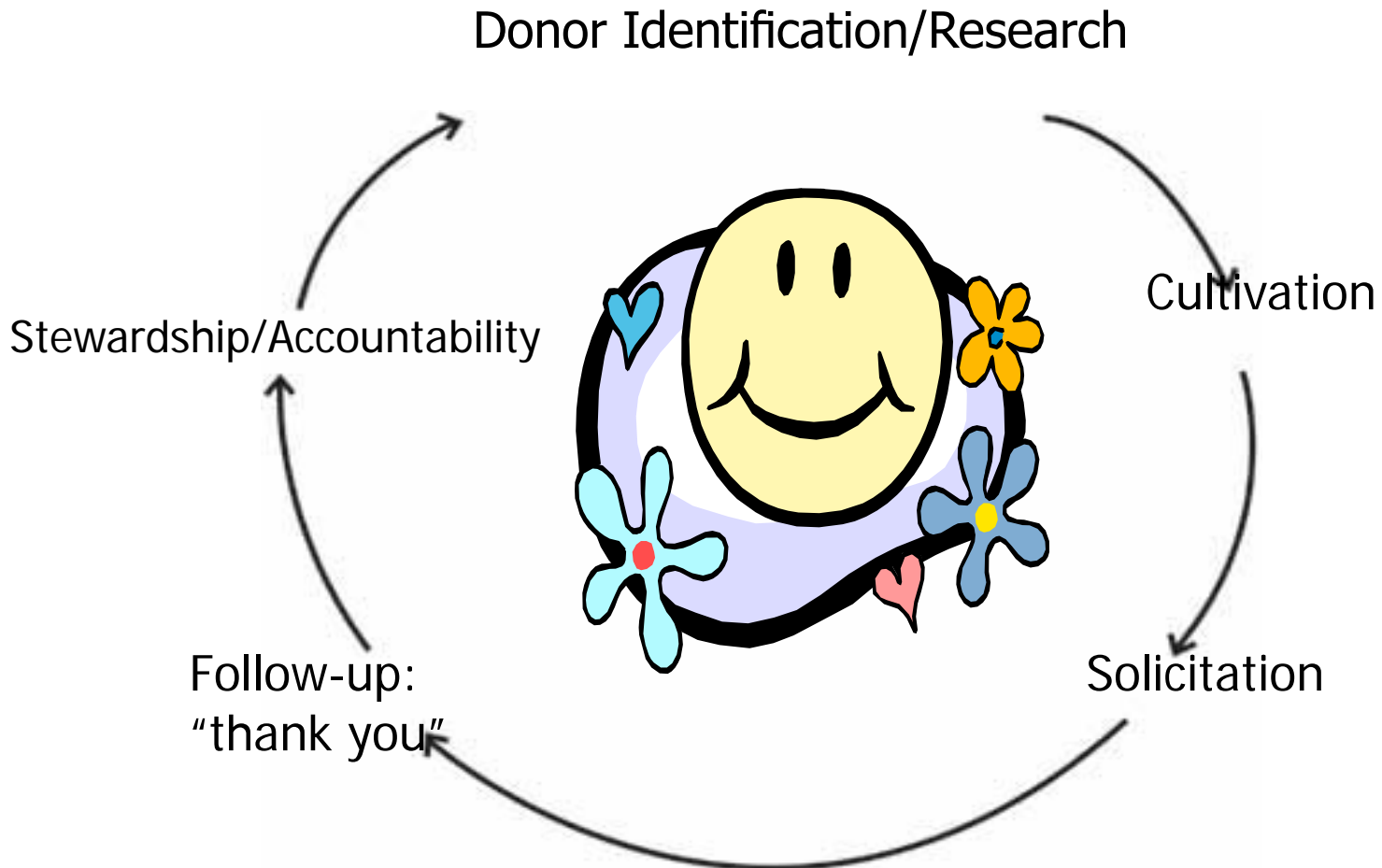
How much money?

How are you going to raise the money?

Who's going to raise the money? Board? Staff? Other?

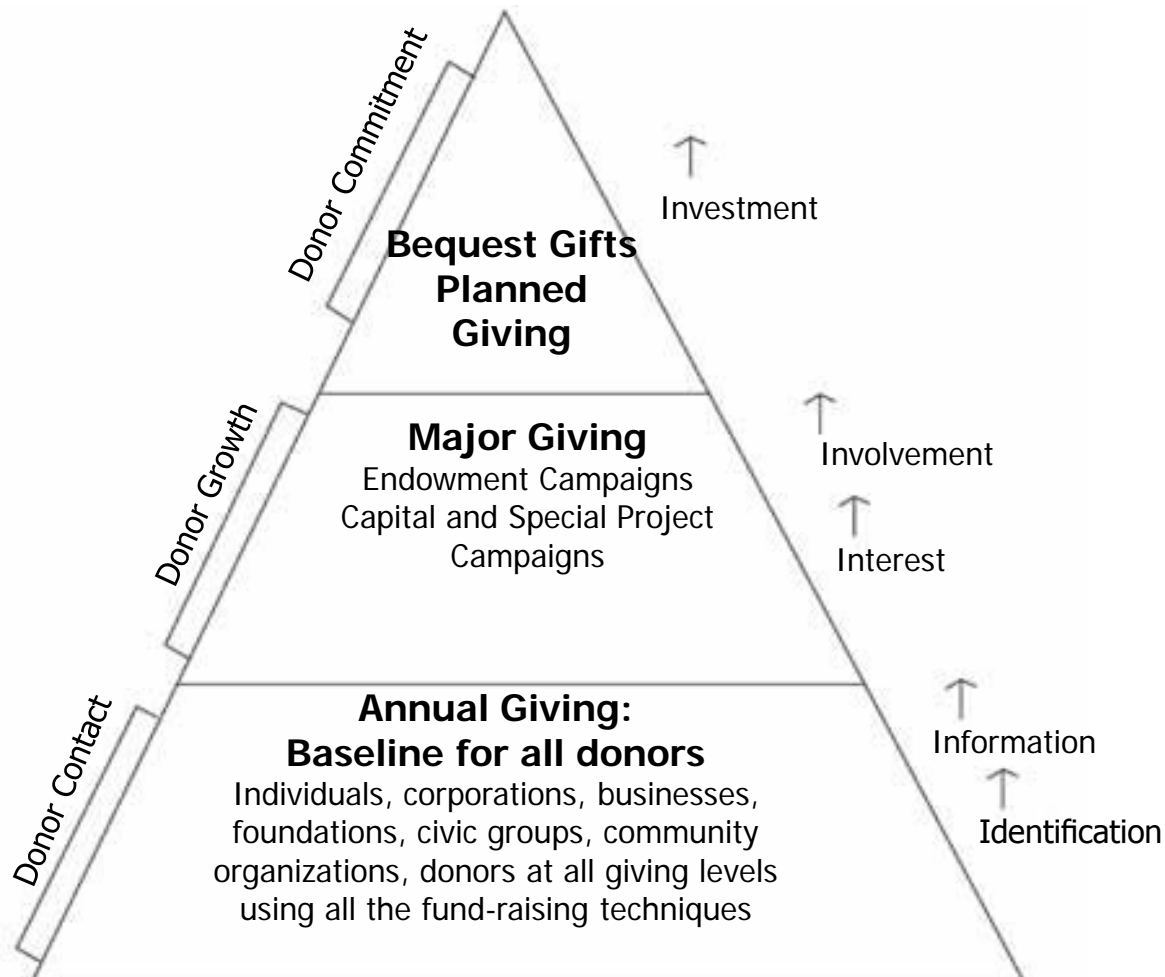
What's the plan to raise the money?

The Cycle of Fundraising

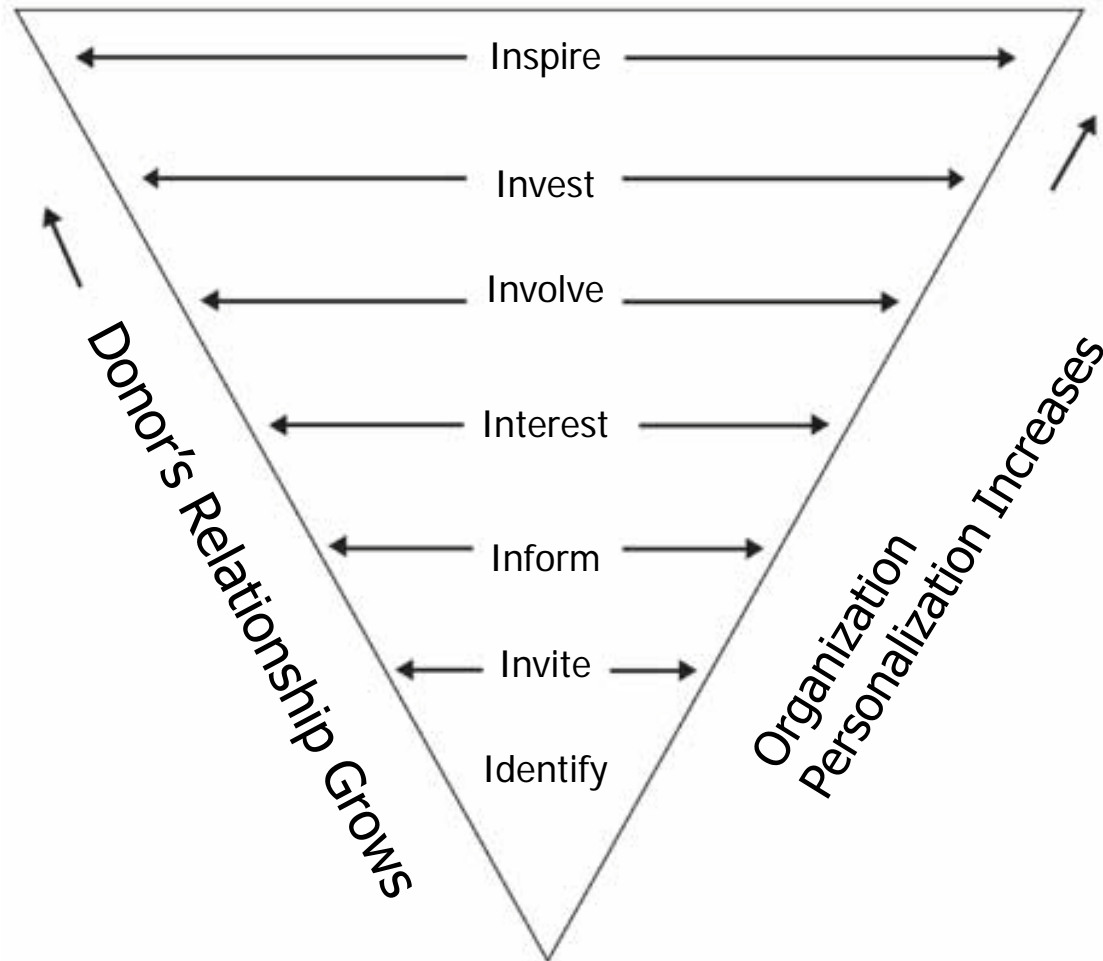


Pyramid of Giving: Donor Development

Volunteer Moves Management

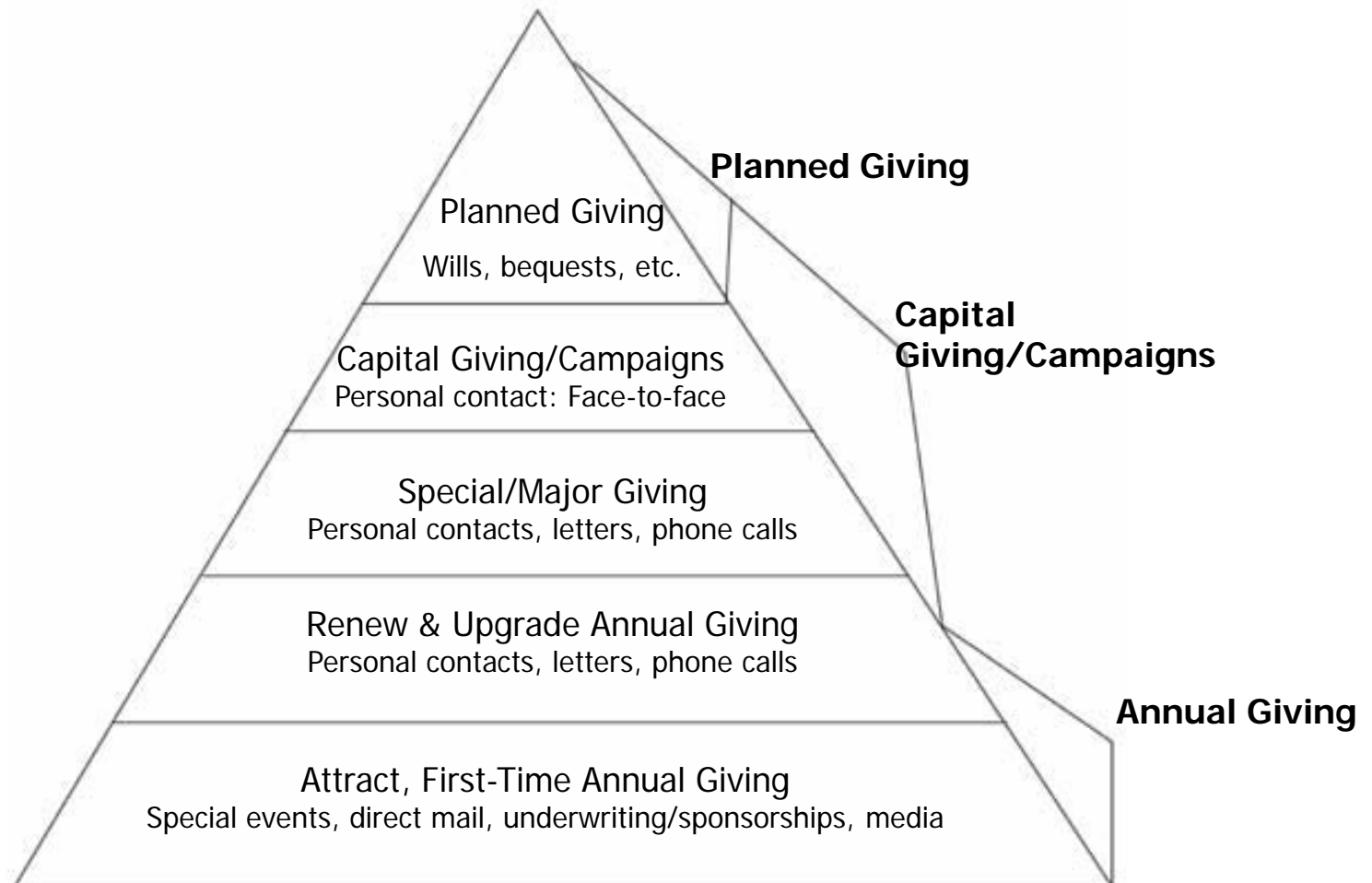


The Inverted Pyramid of I's



Pyramid of Giving:

Building Relationships with Funders



AND THE SURVEY SAYS...

How you raised the money---

Book Sales...Logo on Merchandise

Program Sponsorships...Annual Appeal

Community Picnic...Volunteer Recognition Night

Gala...Used Book Store...Theatre Benefit

Book Sales at Farmer's Market...Garden Party

Raffle...House Tour...Mother's Day Flower Sale

Friends Cookbook...Booth at Fair

Giant Pumpkin Party...Literacy Partner

Sponsorships...Arts Council Grants

AND WHAT DID BEST

Top Money-Makers from Survey

\$40,000	Used Book Store
\$30,000	Direct Mail/Annual Appeal
\$26,000	Giant Pumpkin Party
\$25,000	Gala/Annual Dinner
\$14,000	Community Picnic
\$10,000	Membership Drive
\$5,000 - \$9,500	Multiple Book Sales...Raffles...Cookbook Logo on Merchandise...Volunteer Award Dinner

In the Real World

What about the Role of the Board?

Versus

The Role of the Staff?

An Exercise

Trustees' Roles & Responsibilities

Managing resources wisely, serving as stewards of the public good

Fiduciary

- files, maintains all legal documents, requirements
- drafts, reviews bylaws
- oversees, approves annual financial audits
- prevents conflicts of interest
- identifies, recruits, orients new board members & evaluates performance

Programmatic

- approves goals that are "mission driven"
- ensures effective strategic plans, setting future direction
- establishes funding priorities, policies to guide board, program and fundraising
- approves capital financial improvements

Financial

- identifies, secures adequate financial resources
- reviews annual budget
- oversees financial operations, maintaining stewardship
- maintains financial accountability, investment policies, accounting procedures
- serves as an ambassador, enhancing public standing

Annual Giving: A Year Long Trip

Annual giving is the process of seeking financial support on an annual basis – within a 12-month period – from a broad diversity of funding sources with income generally for operating support.

Available Fundraising Techniques

- face-to-face solicitations
- personal letters
- donor clubs
- foundation proposals
- corporate proposals
- special events
- challenge gifts
- underwriting, sponsorships
- affinity groups
- civic groups, community organizations
- gifts-in-kind
- phonathon, telemarketing
- estate, planned giving
- cause-related marketing

Successful Annual Giving Program: Key Ingredients

- A detailed 12-month, Annual Fund Plan
- Involvement of leadership in development of the Plan
- Realistic fund-raising goals
- Available fund-raising leadership/committee structure
- A compelling case for support
- A list of giving opportunities
- Diversified fund-raising techniques
- Strategies for “prospect movement,” development process
- Resources: budget, staff, research
- Timetable for planning, execution & evaluation
- Gift acquisition, renewal, upgrading strategies
- Accountability: gift processing, maintaining records, reporting procedures

Case For Support Questions

- Why do *you* or *would* you support the library?
- What do you say to people about the library?
What are your three talking points that “sell” the library?
- Who have you asked in the past three months to visit the library, participate at events, contribute a gift?
What has been their response to your requests?
- Who haven't you asked? Why?
(e.g., friends, business associates, colleagues, etc.)
- What are people's objections about supporting the library?
- What do you say to overcome their objections?

WORKSHEET

ANNUAL FUND PLAN

TECHNIQUES OR SUPPORT ELEMENTS	YEAR 1												YEAR 2											
	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D
Major Gifts																								
Private Foundations																								
Direct Mail																								
Planned Giving																								
Special Events																								
Corporations																								
Cultivation																								
Prospect Research																								
Materials																								

Statement of Functional Expenses

Items of Expense	Total Fund Raising Expense	Allocation of Expense by Fund Raising Activity							
		Major Donor	Planned Gifts	Direct Mail	Special Events	Prospect Review	Cultivation	Admin	General Support
Salaries, Taxes, Benefits									
Consultant Fees									
Office Supplies									
Telephone/Fax									
Copy Machine									
Postage/Fed Ex									
Occupancy									
Rental/Maintenance of Equipment									
Printing/Publications									
Training/Conferences									
Meetings									
Membership Dues									
Travel									
TOTAL									

These columns can include both techniques & support elements & should capture whatever breakdown of expenses is most useful to your organization.

The Tipping Point: Little Things Make A Big Difference

“We spend a lot of time thinking about how to say our message, where to place it, making the message into contagious “epidemics” – reaching as many people as possible. The hard task of communications is often finding the right “connectors.” The person delivering the message is *as important as* the message.”

Malcolm Gladwell