

BGSU Libraries Development Plan

August 2004

Introduction

In November 2001, Dean Lorraine Haricombe established the Library Fund Raising Committee, now the University Libraries (UL) Development Committee. Its charge has remained steady over the past two and one half years: identify a donor base for major fund raising projects; identify other techniques and activities to acquire funds; educate and foster library-wide participation in fundraising; and, establish a significant dollar benchmark by the 40th anniversary of the Jerome Library in 2007, to be used with capital funds for the renovation and expansion of the building. By March 2002, the UL Centennial Campaign was established with the dedication of the gift tree. In May 2002, the Committee hosted Alumni and Development Offices staff for a presentation of the Jerome Library's need for renovations and expansion. In 2003, the UL adopted a strategic plan which included *Pursuing Funding Strategies* as one of its ten strategic directions. The first objective under this strategic direction involved the articulation of a "comprehensive development plan for the UL encompassing donor relations and development work, grant submissions, capital planning activities, and pursuit of other funding sources for enhancing collections, staffing and physical facilities."

During the past year, the committee focused on assisting the Dean in developing an advocates group, creating lists of potential major contributors to a UL capital campaign, discussing various fundraising activities, and with the support of the administrative office, comprising databases of other potential contributors such as former student employees. Under the guidance of the Development Office liaison, Sharon Hanna, the UL Development Committee held two half-day retreats during which the following UL Development Plan was formed.

Connections With Communities

The UL faculty and staff interact daily with members of a wide range of communities who use the UL services and resources. Many members of these communities have giving potential and they need to be identified and more fully engaged with the UL. Under the Dean's leadership, the university community has become aware of and more active in UL development opportunities. Long time supporters of the special collections, specifically, the Center for Archival Collections, the Browne Library for Popular Culture Studies, the Music Library and Sound Recordings Archives and the Curriculum Resource Center, who already give in terms of gifts-in-kind and monetary donations need to be encouraged to more fully support these special collections. Researchers who use these special collections as well as all Library resources—both printed and electronic— have giving potential. Many, but not all, UL faculty and staff understand that their job functions have development potential and this attitude needs to be further cultivated. To summarize, the University Libraries have been involved in development activities with various communities for several years, but have not fully tapped the giving potential of members of these communities.

The UL Development Plan will connect the UL fundraising goals, as first outlined in November 2001, with our giving communities, providing timelines and specific activities and events to achieve the goals.

Development Plan 2004-2007

Priorities and Preparation

The University has undertaken a *comprehensive campaign* “*Building Dreams: The Campaign for Bowling Green State University*” to raise funds for scholarships and to endow positions and programs. Prior to initiating this campaign, a feasibility study was completed to discover what giving potential was available to the University and for what purposes potential donors wanted their contributions used. It became very clear that donors are not enamored with contributing to buildings, but instead wish to give directly to students through scholarships and endowed programs. Thus the UL’s development priorities must include programs, services, personnel as well as expansion/renovation of the Library building. The Development Plan also must include activities directed to an annual giving campaign as well as the more long term endowment campaign. This Plan must address ways in which UL faculty and staff increase their awareness of how they can participate in development activities.

The UL Development Committee has created **general priorities for the Development Plan**. These include enhancement of the facilities—specifically improved group study space and instructional rooms, exhibit space, and expansion of the building for special collections—and endowed positions, programs, acquisition (collections) funds, and scholarships for student interns and possibly employees

Goal: Identify and describe UL points of pride and critical needs to advance programs, services, personnel and the expansion/renovation of the Jerome Library building.

Objectives

- Request unit responses, including financial figures for annual funds and endowments, for points of pride/critical needs by May 25, 2004

Goal: Focus points of pride/critical needs into UL development priorities

Objectives

- UL Development Committee, in consultation with the Dean and Development Office Liaison, will prioritize points of pride/critical needs and assign target funding amounts.
- Promote points of pride/critical needs with UL faculty/staff through administrative meetings and all staff meetings

Engaging the Communities

Organization

For the UL Development Plan to be successful, an organizational structure must be in place including the allocation of responsibilities and the development of a reporting structure. To this end, the following organizational structure should be adopted.

Dean: Represents the BGSU Libraries as the embodiment of its goals and vision, is its chief spokesperson and single most important fundraiser.

Associate Dean(s) or Designees: Represent the Dean when occasion requires it.

Director of Administrative Programs and Services: With the Dean, organizes and implements the development plan in association with the Development Committee, development office liaison and other colleagues, coordinates marketing and communication efforts for UL

UL Development Committee: **With the Dean, identifies a donor base for major fundraising projects; identifies techniques and activities to acquire funds; educates and fosters library-wide participation in fundraising; discusses issues involved with UL fundraising and the Development Plan.**

Faculty and Staff: Recognize that individual work has development potential. Assist when appropriate to advance the development work of UL. Assist in prospect identification, cultivation activities and solicitation efforts.

Major Gift Officer (Development Office): Provides professional support to UL personnel and volunteers.

Volunteers: Assist with identification, cultivation and solicitation of assigned prospects.

Implementation

The UL Development Plan includes both a major gift plan (\$25,000 or more) and an annual giving plan. Both of these plans require the assistance of volunteers, development of specific fundraising events, increased and more development-oriented publicity and marketing, and increased participation (where and when appropriate) in development activities by all UL faculty and staff.

Volunteers

Friends of the University Libraries: The Friends support the UL by sponsoring several annual events and providing student and staff awards and scholarships. The Friends need to be an active participant in the UL development events and programs. The Friends can assist in identifying and cultivating prospects and also support specific fundraising objectives.

Goal: Request that the Friends of the University Libraries sponsor one event per year directly focused on fundraising.

Objectives:

- Identify a development priority and funding level
- Plan an event in consultation with the Dean, Development Office Liaison and the UL Development Committee that addresses an identified UL critical need

UL Advocates: The creation of a UL Advocates Group is another component of the UL Development Plan. The Dean already has begun identifying candidates for this group. Advocates are expected to give a generous contribution, generate awareness of UL needs and programs (points of pride and critical needs), give advice and raise money, identify and cultivate donors, and provide effective advocacy for UL.

Goal: Create a UL Advocates Group to assist the Dean with UL development efforts.

Objectives:

- Identify interested individuals and establish a UL Advocates Group during the Summer of 2004.
- Convene the UL Advocates first organizational meeting in September 2004

Fundraising Events

Many UL events which include development and/or specific fundraising goals have occurred. Examples of such events include the 30th anniversary celebration, the Paul Yon Internship Fund, and the BG Chamber After Hours reception. Both annual activities, such as the Authors and Artists Reception, and special celebrations, such as the Raven Award, now are planned with development/fundraising objectives in mind. Thinking in terms of development opportunities should be part of the planning of every UL event. For example, invite potential and existing donors, distribute development brochures and other literature and include a short presentation as part of the event.

Increasing development and fundraising events and programs in light of decreased UL staffing is of concern. Partnering with other colleges and departments as well as rethinking existing and supported UL programs and activities in development terms may allow for increased fundraising with current staffing levels.

Goal: Establish a UL Development calendar of activities and events

Objectives:

- Identify yearly UL activities and events that lend themselves to UL development priorities
- Educate UL faculty/staff to think of all events as development opportunities
- Encourage faculty/staff to include a development component in planned events
- Investigate opportunities to partner with other areas on campus to meet development goals and objectives

Marketing and Communication

Communication is a vital component of any development plan. Every event, no matter how much a part of the staff's general workload must be thought of in terms of development. Staff recognitions, an interesting acquisition, whether it be a manuscript or an electronic database, a well-known researcher who is utilizing the resources, all have development potential if communicated to the campus community and beyond to appropriate audiences. Each member of the UL faculty and staff must begin to think of their work in terms of development potential—how the work impacts students and faculty and the costs involved. Communicating these activities and events must be centralized in the UL Administrative Office.

Staff Participation

All UL faculty and staff must participate at some level in development activities if the fundraising goals are to be met. Recognition among everyone that there is development potential in most if not all aspects of the work each does is essential to successful fundraising. All UL faculty and staff need to be kept informed as to all development activities, objectives and progress

Goal: Designate a person responsible for coordinating all marketing and communication for UL.

Objectives:

- Liaison with the University's Marketing and Communication Office
- Explore all media venues for publicity (i.e. television, radio, university publication, external publications, electronic publications, etc.
- Develop a marketing plan in consultation with the UL Development Committee

Goal: Communicate UL development updates with UL faculty/staff and provide professional development

Objectives:

- The Dean will provide development updates at all staff meetings or through electronic communications
- UL Development Committee investigate speakers for UL employees related to development

Major Gift Plan

The overall objective of the Major Gift Plan is to increase the number of people who will give to the UL at a level of \$25,000 or higher. These funds are usually earmarked as endowment funds, or could be used to fund the renovation/expansion of the Library. Prospective donors (people who have not given to the UL) as well as donors must be identified. These are people who have the capability to give at the higher levels and have an interest or connection with the UL. These are people who need to be cultivated and solicited with the support of the University Major Gifts Officer.

Goal: Increase the number of individuals donating to UL at a level of \$25,000 or higher for endowments or renovation/expansion of the building.

Objectives:

- Request UL departments identify prospective donors and submit names, addresses and UL affiliation to the Dean
- Regularly review, revise and add to the donor base
- Provide cultivation events, mailings, tours, and visits to UL for prospective and engaged donors
- Focus cultivation activities and focused proposals on points of pride and critical needs.

Goal: Evaluate existing methods for recognizing donors

Objectives:

- Appoint a *task* force to study current gift acknowledgement practices
- Recommend ways to improve and promote consistency of these acknowledgements.
- Develop a reporting structure for all donors that resides in the UL Administrative Office.

Annual Giving Plan

The Annual Giving Plan involves establishing a monetary goal to be raised each year and how the funds will be used (e.g., increasing endowments, funding special projects or acquisitions/equipment, or building improvements). The Plan also identifies specific events, programs and activities which are designated as part of the annual giving campaign.

Goal: Establish an UL Annual Giving Plan with focused needs and monetary goals.

Objectives:

- Identify a goal for the **2004-2005** UL annual campaign by fall 2004
- Continue to build the exiting database of potential donors for annual campaign contacts
- Identify and develop database information for targeted audiences (i.e., previous student employees)
- Develop contact methods for targeted audiences
- Evaluate the use of direct mails
- Work with the University Telefund Office to be included in the 2004-05 fundraising plans
- Coordinate with the UL Friends an annual campaign activity focused toward a specific priority
- Continue to advocate the UL be included in the Family Campaign as a priority
- Assess annual campaign programs as to their effectiveness in reaching targeted audiences and goals