

Reinventing Your Friends Board: *From Book Sales to Best Practices*

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 **Goettler Associates**
FUND RAISING MATTERS

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Why Talk About Friends?

- PA's unique Library Structure
- Local Library Boards are quasi-governmental
- Statutory Responsibilities:
 - *Legal – Planning – Evaluation*
- Commonwealth's level of support is decreasing
- **Your Library Board is Ill-Prepared to Lead Development (Fundraising)**

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The Role of Trustees

| Basic Responsibility | Typical Non Profit | PA Library Trustees |
|-------------------------------|--------------------|---------------------|
| Determine Mission | YES | No |
| Select Chief Exec | YES | No |
| Support Chief Exec | YES | Limited |
| Ensure effective planning | YES | YES |
| Monitor/Strengthen Services | YES | YES |
| Ensure Adequate Resources | YES | Limited |
| Protect Assets / \$ Oversight | YES | Limited |
| Build Competent Board | YES | Limited |
| Legal & Ethical Integrity | YES | Limited |
| Enhance Public Standing | YES | Limited |

Source: BoardSource 2009, Richard T. Ingram

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Benefits of A Supporting Organization

- Fundraising
- Advocacy
- Outreach
- Volunteer Support
- Involvement

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The Role of the Friends Board

- Recognize your organizational history
- Self-selected members
- Liaison to Municipality & Library District
- Enhance Operating Budget
- Influence Community Support
- Can hold and manage assets
- Limitations?


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Foundation vs. Friends ?

- Recognize the Source of Major Gifts
- Corporate & Civic Leaders?
- Foundation Protects the Donors Intent (outside Gov't control)
- "Big Asks," Planned Gifts, Bequests, Corp/Fndn Grant Applications, Capital Projects
- Manage Endowment Fund and Disbursements

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It's All About the Libraries: A Personal Case Study Worthington Libraries



Old Worthington Northwest
Worthington Park

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Public Library Services

Worthington Libraries

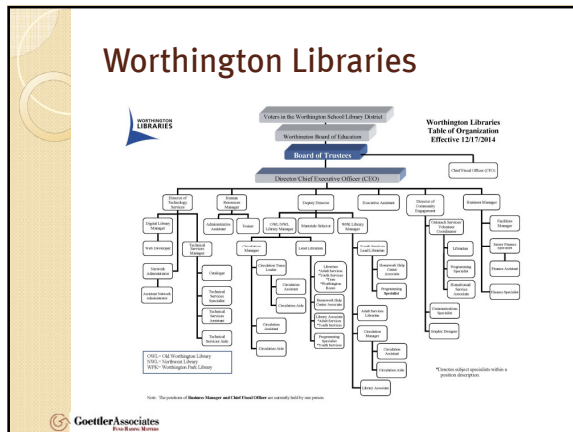
- Founded in 1803 to serve 100 people on the Ohio frontier
- Serves a diverse population of 60,000 residents in the Worthington School District
- One of only 2 systems in the state to be funded by 2 property tax levies
- Access to 4 million items through a partnership of 14 central Ohio libraries

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Worthington Libraries

- 2007 Library of the Year
- 2011 John Cotton Dana Award for outstanding public relations
- Recognized as a Five-Star Library each year the rating have been published by Library journal – of 1000s of libraries evaluated each year, WL is one of only 20 to receive this distinction.
- \$9 M budget and highly qualified staff

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- ### Friends Foundation
- Founded in 1972 as the Friends of the Worthington Public Library
 - Increase use and awareness
 - Advocate for public funding
 - Financial support
 - Primary project: Used Book Sale

Mission 1972: Book Sales

To raise funds that support programs and services offering lifelong learning opportunities for those who live, work, and attend school in Worthington, and other users of the Library system; and to support the library staff and its volunteers with awards and recognition

The Library Progresses – Friends: *Slow to Change*

- 1980-2000: From Conflict to Status Quo
- 2000-2010: Change Imposed through External Forces – the Friends Foundation is formed
- 2010-2012: Looking for an effective structure – Friends or Foundation?
- 2013: Strategic planning occurs - book sales persist but the lightbulb goes off

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Strategic Planning 2013

- A new Mission Statement
- Articulated passion and rationale
- A tipping point: majority of Friends believe we must become relevant or why bother?
- Library leadership: endowment control a source of concern
- Staff perception “I’ll believe it when I see it.”

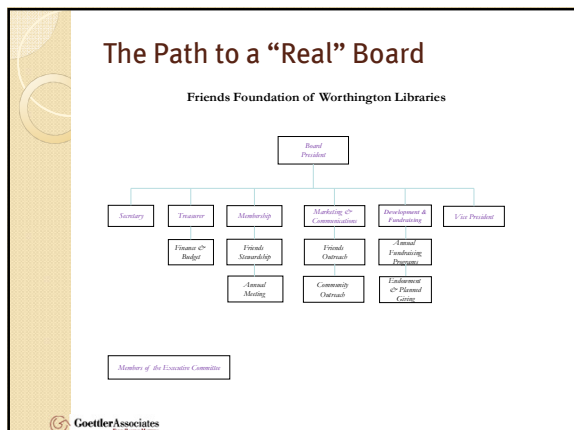
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Mission 2013: Best Practices

New Mission Statement

- **Increase** awareness of the Library services and programs
- **Inspire** community involvement in Friends Foundation activities
- **Provide** funding to support the Library’s mission
- **Advocate** for strong public Library funding

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- ### Best Practices Tool Box
- Organizational Chart
 - Job Descriptions
 - Board Member Application
 - Board Orientation
 - Consent Agenda
 - Conflict of Interest Policy
 - Volunteer Conduct Policy
 - By-Laws Review
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- ### Challenges and Opportunities
- Book sale has become a subset of Annual Fundraising Programs
 - Number of sales limited in 2016 allowing time to focus on other strategies – fully supported by Library leadership
 - “Book Sale Board” faction resistant to change
 - Sale Liaison created – one voice
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Challenges and Opportunities

- Need for more frequent meetings resulted in attrition
- New board members brought on who embrace who embrace change
- Increased work load on those working for change
- Inexperience/indifference is apparent
- Repositioning of “Book Sale Board Members” may/may not work

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Friends Foundation and the Future

- Rebranding underway
- Recognition that change takes time but succession an issue
- New emphasis on relevance through community outreach
- New fundraising activities will take time to gel
- Continued focus on improving relationship with Library leadership

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What’s ahead for 2016?

- Written commitment to annually allocate endowment investment income to Library special projects
- Collaborations with community organizations for a “Big Thing” in 2016
- Book Sales to become mini family festivals
- Membership solicitation and Friends cultivation

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Why Should You Do It?

- Success!
- Significant Involvement
- An evolving and perpetual system for volunteer engagement
- Creating a robust corps of volunteers
- . . . Because . . . volunteers make better donors!



Thank You!



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