Strong Advocacy. Stronger Fund Raising

Presented by Libby Post, Communication Services
September 6, 2018
Westchester Library System
Contact Information:
• Libby Post, President & Strategist-in-Chief
• W: 518/438-2826
• C: 518/857-6788
• lpost@commsservices.net
• www.commsservices.net
• PO Box 1115, Albany, NY 12201
Why Be An Advocate

• If you don’t stand up for your library, who will?
• If you stand up for your library
  – Staff will
  – Friends will
  – Patrons will
  – Community leaders will
  – Our elected officials possibly will (if we make it politically safe for them)
Your Advocacy Message

• Your message is the core argument
• Must be the foundation upon which all organizing is based
• Bold, clear, concise
• People should feel their self-interests are connected to the interests of the campaign
• Talk directly to people in plain language
Your Advocacy Message

• Message based in values should be succinct, compelling and understandable

• Paul Wellstone:
  – “People respond according to their sense of right and wrong. They respond to a leadership of values.”

• Never assume people will see the inherent logic of our view and support us
  – Have to give them a reason to support us before asking for their support
Your Advocacy Message

• Empowering people to participate and act
• Take away a good feeling from being a part of the campaign
  – Emotional hook
• Want to inspire people to take action
  – Depends on whether message leaves people feeling hopeful, energized and that their contribution will make a difference
What Do We Mean By “Essential Service?”

Library
Fire
Police
Health Care
Schools
Return on Investment

SCARSDALE PUBLIC LIBRARY

OUR ACTIVITY FOR 2015

- 263,732 LIBRARY VISITS
- 27,862 PUBLIC COMPUTER SESSIONS
- 80,303 WIRELESS SESSIONS
- 370,955 ITEMS CIRCULATED
- 17,703 eBOOKS downloaded
- 17,244 PEOPLE attended 489 LIBRARY PROGRAMS

TOTAL VALUE of Library programs and services: $8,751,162

For every village tax dollar invested, $2.39 RETURN ON INVESTMENT

These numbers come from the Library’s State Division of Library Development annual statistical report. The Return on Investment is derived from dividing the amount of Village public funding into the total value of library programs and services.

MESSAGE: WHAT YOU SAY
STRATEGY: HOW YOU SAY IT
RESULTS: THEY SPEAK FOR THEMSELVES!
ROI and a Building Project

CONTINUE OUR INVESTMENT... IMPROVE THE SCARSDALE PUBLIC LIBRARY

There’s no doubt that the Scarsdale Public Library is well used and is a good investment of our tax dollars.

Improvements to the building will include:
- A larger children’s room
- Quiet, comfortable reading and work spaces
- A dedicated teen zone
- A technology suite and Maker Space
- Two new multi-purpose meeting rooms and four small quiet study/meeting rooms to accommodate the needs of local community groups
- Open stacks to house our fall collection
- Accessible bathrooms and elevator

We need to improve the Scarsdale Public Library
- The building does not comply with the Americans with Disabilities Act.
- The Library’s main room is built on a slab. Coupled with the room’s 1970’s wiring, it is nearly impossible to retrofit our space and keep up with the community’s technology needs.
- The building is not adequate to meet the demands of the community. Our two meeting rooms are booked to capacity, there are no small group rooms for students or others, the children’s room is too small, our teens have no dedicated space and there’s no comfortable, quiet space for our patrons.
- Currently, the building is looking at repairs that if not rectified will balloon to at least $4.5 million within the next 15 years—the life of the proposed bond.

We cannot and should not take a band aid approach to improving the Library. The Library’s Improvement Plan is an opportunity for Scarsdale to come together and make a positive difference for all of us.

<table>
<thead>
<tr>
<th>Library</th>
<th>Funding Sources</th>
<th>Project Scope</th>
<th>Start Year</th>
<th>Total Square Footage</th>
<th>Cost Adjusted for Inflation</th>
<th>Cost Per SF</th>
</tr>
</thead>
<tbody>
<tr>
<td>Osning</td>
<td>Bond/Grants</td>
<td>New Building</td>
<td>2004</td>
<td>44,000</td>
<td>$22,527,022.61</td>
<td>$511.99</td>
</tr>
<tr>
<td>Darien</td>
<td>Private/Sale of Bldg</td>
<td>New Building</td>
<td>2006</td>
<td>54,000</td>
<td>$32,253,933.10</td>
<td>$591.99</td>
</tr>
<tr>
<td>Mt. Kisco</td>
<td>Bond/Grants</td>
<td>New Building</td>
<td>2006</td>
<td>16,000</td>
<td>$12,073,070.87</td>
<td>$815.22</td>
</tr>
<tr>
<td>Greenburgh</td>
<td>Bond/Grants</td>
<td>Expand &amp; Renovate</td>
<td>2006</td>
<td>40,000</td>
<td>$31,694,877.43</td>
<td>$807.98</td>
</tr>
<tr>
<td>Tamarack</td>
<td>Bond/Grants/Grants</td>
<td>Expand &amp; Reno</td>
<td>2017</td>
<td>35,400</td>
<td>$17,300,126.59</td>
<td>$491.99</td>
</tr>
</tbody>
</table>

A Dig-Once Opportunity

The Library’s Trustees heard the concerns of the Village Board and the community. $3 million has been cut from the proposed project and it is now the right size for our community. The $3 million cut amounts to 30% of the net municipal costs.

The total cost of the Library Improvement Plan is $17.9 million. Independent estimators were used to develop the project’s cost.

For homes in Scarsdale assessed at $1.5 million (average residential property assessment), the cost of the Library Improvement Plan would be $137 a year or $2.63 a week—less than a Starbucks coffee.

When looking at the costs of similar local library building projects, our costs are on the lower end of the scale.
Strong Message=
Strong Advocacy

• Build your base of support
  – Community leaders
  – Opinion leaders
  – Friends and Patrons
  – Moms and Dads
  – Adult Users
    • Over and under 50
Getting People Engaged

• Folks relate to your message
• Get emotionally attached to your cause
• Will work for the Library
• Want the Library to be strong and an important part of the community
Making That Energy Work in Fund Raising

• Fast forward—you’ve won your advocacy campaign
• Now what?
• Turn your advocates into donors
• Continue your message but shape it so that instead of voting people give
Your Fund Raising Message

• Your message is the core reason to give
• The foundation upon which all asks are based
• Bold, clear, concise and emotional
• People should feel their self-interests are connected to giving
• Talk directly to people in plain language
Your Fund Raising Message

• Message based in values should be emotional, compelling and understandable

• Paul Wellstone:
  – “People respond according to their sense of right and wrong. They respond to a leadership of values.”
Your Fund Raising Message

• Empower people to participate and act
• Have a good feeling from giving
  – Emotional hook
• Inspire people to take action through giving
  – Depends on whether message leaves people feeling hopeful, energized and that their contribution will make a difference
What Do We Mean By “Essential Service?”

- Library
- Fire
- Police
- Health Care
- Schools
Basic Tools You’ll Need to Start

• Lists
  – You need to have lists of your advocates.
    • Friends
  – If you tracked your supporters in the voter file database, you’ll have their snail mail address
  – If you garnered email addresses from an online petition, match them to the snail mail address
  – If you can update phones—cell and land—that would be great
Basic Tools You’ll Need

- Understanding Who Gives and Why
In 2016, INDIVIDUAL DONORS drove the rise in philanthropic giving. And for only the sixth time in 40 years, all nine major philanthropy subsectors realized giving increases.

$390.05 billion

Where did the generosity come from?*

- **Giving by Individuals** $281.86 billion
  - increased 3.9 percent (2.6 percent when inflation-adjusted) over 2015

- **Giving by Foundations** $59.28 billion
  - was 3.5 percent (2.2 percent when inflation-adjusted) over 2015

- **Giving by Bequest** $30.36 billion
  - declined 9.6 percent (10.1 percent when inflation-adjusted) over 2015

- **Giving by Corporations** $18.55 billion
  - increased 3.5 percent (2.3 percent when inflation-adjusted) over 2015

The single largest contributor to the growth in total giving was an increase of $10.53 billion in GIVING BY INDIVIDUALS—offsetting declines from bequest giving.

Giving to international affairs comprised a larger percentage of total charitable giving in the United States, increasing from 4 percent to 6 percent in 2016.

Giving to environment/animals increased 7.2 percent in 2016, the largest gain of any subsector, outpacing growth in overall giving for the last two years.

Where are all of the charitable dollars going? (as a percentage of the total)

- **32% Religion** $122.94 billion
- **15% Education** $59.77 billion
- **12% Human Services** $46.80 billion
- **10% To Foundations** $40.56 billion
- **8% Health** $33.14 billion
- **8% Public-Society Benefit** $29.89 billion
- **5% Arts, Culture, and Humanities** $18.89 billion
- **6% International Affairs** $22.03 billion
- **3% Environment/Animals** $11.05 billion
- **2% To Individuals** $7.12 billion


* All figures on this infographic are reported in current dollars unless otherwise noted.

Giving USA Foundation™, The Giving Institute, and the Indiana University Lilly Family School of Philanthropy are pleased to continue their partnership in providing the most comprehensive, longest-running, and most rigorously researched resource on U.S. charitable giving. Giving USA: The Annual Report on Philanthropy. It is a privilege to report on Americans’ generosity and related historical trends on U.S. charitable giving.
Who Gives More?

• Volunteers with a relationship to the organization
  – Households with at least one volunteer gives at a much higher percentage than households without

• People who have been engaged in advocacy
  – They are volunteers, after all
You Have Lists, You Want to Raise Money, Now What?

- **Legal Structure**
  - Work through the Friends
  - Create a Foundation
  - Separate 501C3 so that the money is not considered public
  - Join the NY Council of Non-Profits

- **Leadership**
  - Who will lead?
  - The chair of the Library Board can’t be chair of the 501C3 board
  - There can be overlap
  - Mission is clear—to support the Library
  - Everyone gives
Where Do You Start?

• Plan
  – Determine what you want to do
  – How much you’d like to raise
    • Be realistic

• Years 1-3
  – Special events
  – Direct mail
  – Online giving
  – Social Media
Events—Most Time Consuming

• What type of event
  – Who are you honoring?
  – What kind of fun do you want to have?
• Honorary Committee
• Corporate Support
• Event Journal
• Invitations
Events—Most Time Consuming

• Logistics
  – Venue
    • Decorations/flowers
  – Food
  – Drink
  – Awards

• Staffing
  – Paying at the door
  – Ability to take credit cards

• Silent auction
• Program
• MC
• Cleaning Up
Event Check List

TO: HOLLY MCKENNA AND LITERARY LEGENDS EVENT COMMITTEE
FROM: LIBBY POST
COMMUNICATION SERVICES
RE: EVENT PLANNING CHECK LIST

Below is a check list of activities for the event. This list is a living document. As we move forward, feel free to add to it and new ideas are developed.

Event: Literary Legends, Saturday, November 14th, 7 p.m.-9:30 p.m. at APL’s Delaware Ave. Branch

<table>
<thead>
<tr>
<th>Timeframe</th>
<th>Tasks</th>
<th>Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>August 2015</td>
<td>Develop a budget (see sheet attached)</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>Maintain attendance goal to help estimate costs</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>Determine costs for food and beverage, beyond what is donated</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>Determine entertainment costs beyond what is donated</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>Estimate costs to rent skirball high-top tables and 60” tables for food, beverages, silent auction and check-in</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>Podium and microphone rental costs</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>Guest literary committee prospect lists from honorary chairs and honorees</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>Develop list for programs, local business, other vendors, community partners</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>Select event sponsors, program advertisers (local and major vendors)</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>Solicit honorees committee</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>Select honorees committee</td>
<td>☐</td>
</tr>
<tr>
<td>September 2015</td>
<td>Organize silent auction committee and begin to solicit items</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>Design invitation</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>Food and beverage donations secured</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>Entertainment secured</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>Solicit program ads, local businesses, other vendors, community partners</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>Secure additional names and addresses for invitation list from honorees</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>Follow up on sponsor solicitation requests</td>
<td>☐</td>
</tr>
<tr>
<td>October 2015</td>
<td>Follow up on program book or solicitation requests</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>Print and mail invitation package by October 1</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>Order honoree gifts</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>Finalize food, beverage and live music</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>Reserve tables, podium, and microphones as needed</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>Targeted phone follow-up on invitations</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>Follow up on sponsor solicitation requests</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>Follow up on program book or solicitation requests</td>
<td>☐</td>
</tr>
</tbody>
</table>

October 2015
- Determine signage needs
  - Welcome signs
  - Sign-in table sign
  - Honorary committee/sponsor board
  - Determine staffing needs
  - Determine who will MC the event
  - Determine order of program
  - Follow up on sponsor solicitation requests
  - Follow up on program book or solicitation requests

Week of 11/2
- Finalize the following
  - Food and beverage arrangements
  - Entrance count
  - Staffing
  - Program book layout and printing
  - Silent auction donations

Week of 11/9
- Produce event journal

11/14—Day Of
- Set up check-in
  - List of attendees
  - Set up name tags alphabetically
  - Distribute program books, one per couple
- General Set-Up
  - Silent auction table
  - Food and beverage tables
  - Live music
  - Podium and Microphone
  - Signage
- Order of Events
  - Make sure MC and honorees are in place for program
  - Recognize elected officials and dignitaries
  - Make sure awards are where they should be
  - Make sure script is available and followed

Post-Event
- Analyze what went well and where to improve for next year
  - Record and develop a check list
  - Determine date for 2016
- Reconcile invoices, pay final vendor bills
  - Determine net income
Event Budget
Invite Package

- Should be professionally done
Invite Package

Name: ________________________________
Address: _____________________________ City: __________ State: ____ Zip: _____
Phone: _______________________________ Email: __________________________

__ Yes, I/we will attend Literary Legends. Please reserve _____ ticket(s) at $75 each.
__ Yes, I/we will attend the event and join the Honorary Committee.
__ No, I/we cannot attend the event but would like to make a contribution.

Enclosed is a check in the amount of $ __________ Payable to: The Albany Public Library Foundation.

Please charge my credit card in the amount of $ ________.
__ VISA __ MasterCard Credit Card Number: ____________________________
Expiration Date: ____________ Security Code # on the back of card: ____________
Name as it appears on the card: ____________________________

You can pay for your tickets online at www.albanypubliclibraryfoundation.org/news-and-events/
Contributions to Literary Legends are tax-deductible to the extent allowed by law.

| MESSAGE : WHAT YOU SAY |
| STRATEGY : HOW YOU SAY IT |
| RESULTS : THEY SPEAK FOR THEMSELVES! |
Invite Package

CELEBRATING THE
ACCOMPLISHMENTS OF:

- MARION ROACH SMITH
- DR. LEONARD A. SLADE, JR.
Annual Appeal/Direct Mail

- Renewable, reliable source of income
- Long-term commitment
- Opportunity to reinforce message and “tell your story”
- Build donor/member base
- Build relationship
Dear Dan,

When she was just ten years old, her mother said “I know you love reading fiction, but it’s time to expand your horizons.” The little girl told the Children’s Librarian at her local public library what her mother said. In turn, the Librarian introduced her to the biography section, filled with stories of powerful women who made history. Stories about Harriet Tubman, Rosa Parks, Louisa May Alcott, and her favorite one of all – Marie Curie.

Fast forward forty plus years to 2014, and that little girl is now Hudson’s Mayor, Tiffany Mattia Hamilton. The Mayor credits her local public library with who she is today—a dedicated public servant. Hudson Area Library’s Summer Reading Program opens the same doors for the thousands of children who participate each year.

Encouraging what the Summer Reading Program can do for any child—no doors it opens, the reach it expands—such are commitments to the Hudson Area Library. Please join me in giving another gift to the Library’s Annual Appeal – a gift that helps support our annual Summer Reading Program.

A $25 donation helps underwrite 2 children coming to the program. $50 enables us to provide 50 free books for Libby’s kids to take home and keep. $100 supports our annual SummerFest on Saturday, July 12th where families from all over the city come for a full-filled day of activities, games, prizes and food.

Your support will ensure that our Summer Reading Kids maintain and improve their reading skills over the summer. We both know, as does Mayor Hamilton, reading provides a window to the world through which children can expand that horizon far beyond the city’s limits. More than 1,000 of Hudson’s elementary school children participate in the Library’s Summer Reading Program. It’s a barrier-free activity available to any of our city’s children.

Please consider donating a little or a lot to the Summer Reading Program in recognition for the mind. Your gift to the Hudson Area Library’s Summer Reading program helps our children be the best they can be—perhaps even leaders of our great city and beyond.

Reading and comprehension are essential to our children’s future success. The Summer Reading Program provides both. Please join me in supporting this vital program for Hudson’s children.

Sincerely,

Miranda Barry
President, Hudson Area Library Board of Trustees

51 N. 6th Street
Hudson, NY 12534

Please make your check payable to Hudson Area Library and mail it with this form, in the enclosed envelope, to 51 N. 6th Street, Hudson, NY 12534.

Dan Conlin
56 Warren St.
Hudson, NY 12534

Donate it's easy

2017-2018 ANNUAL APPEAL

> MESSAGE: WHAT YOU SAY
> STRATEGY: HOW YOU SAY IT
> RESULTS: THEY SPEAK FOR THEMSELVES!
The Package

• The Envelopes
Opening the envelopes and booking the contributions is the really fun part!
Online Giving

- Website with donate button on homepage
Online Giving

- Donate page
Online Giving

- Merchant account page for amount
Online Giving

• Merchant page for transaction
Options

https://www.capterra.com/fundraising-software/

• Online Giving and Donor Tracking
  – Network for Good
  – DonorPerfect
  – eTapestry/Blackbaud
  – Salsa
  – Raiser’s Edge
  – Rally
Online Fund Raising and Social Media

• You have to be on social media
  – Facebook
  – Twitter
  – Instagram
• Make sure your webpage is connected to your Facebook page
• Make sure your Facebook page lists your website
Online Fund Raising and Social Media

https://nonprofits.fb.com/topic/fundraising-tools/
Online Fund Raising and Social Media
Strong Advocacy.
Stronger Fund Raising

• You have the lists
• You have the resources
• You have the ability
• It’s time to plan and raise $$!