

Which came first, the project or the fundraising?

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Abstract:

One of the harder endeavors faced in a library is maintaining a balance between necessary projects and providing the funds to finance them. Ideally, discussions of funding and projects should go hand-in-hand, as each discussion is relevant to the other. However, this is not always the case. Donors may have preconceived notions about how they would like their generosity used. Similarly, a library's desire to raise capital may tempt it to accept gifts for projects that may not be part of their overall development plan. By including fund-raising at the beginning of a project, a library increases its chances of creating a successful action plan and balancing its financial and project priorities.

Keyword: Fundraising | Libraries | Strategic planning | Financial management

Article:

For many librarians and development officers, the above question may warrant a slight chuckle – of course the project idea is fully developed prior to the introduction of the concepts of funding strategies or budget projections. For the cynical or disillusioned few, it is likely that the opposite conclusion would be drawn: a donor or a granting agency often decides which projects or priorities are important for a library to the impairment of the scholarly process.

Both contentions are sometimes correct – each to the possible detriment of the libraries, fund-raising professionals, donors, or granting agencies involved. Without clear priorities and direction, a library could become a hodgepodge of donors' wishes in terms of collections, space allocation, and even staffing needs. Without a concept of donors' wishes and granting agency guidelines, the library could also become a myriad of unfinished and/or under-funded projects. The key to successful fundraising and goal attainment is achieving balance between these competing demands.

Achieving balance

The following simple test can help you assess whether your library is achieving fundraising and project balance:

- Is fundraising a component of your library's strategic plan?
- Does the membership of your library's executive cabinet or administrative council include a development officer?
- Has your library met all (or most) of its fundraising priorities during the past two or more years? Has your library met its fundraising dollar goal during the past two or more years?
- Has your library responded to calls for proposals or accepted multiple gifts (cash, deferred, or in kind) for projects that are not included in its strategic plan?
- If you are a library director, has a development professional ever indicated to you that potential projects are not viable or fundable? If you are a development officer, have you ever attempted to raise money for a project that you felt was not viable or fundable?

The best answers would be yes to the first three questions, and no to the last two questions, as explained below.

Failure to plan is planning to fail

The old chiasmus holds true for balancing fundraising and priorities. Every library – whether public or private – has a strategic plan that outlines its goals and priorities over the course of the next year or a set period of years. Within this strategic plan, there are often sections concerning collections, staffing, and possible expansion. Most plans even include segments related to budgeting or finance. How many include a subsection on fundraising? Review your library's most recent strategic plan – does it include information on fundraising? If it includes projections for growing collections, increasing staffing, or creation of a new library wing, it should. Without including key information about fundraising needs, goals, or expectations – especially in today's tough budget climate – a strategic plan that omits fundraising is lacking and ignoring a vital component of a library's fiscal health.

A seat at the table

As a component of priority establishment, it is important to think about who should be involved in the process. Appointing a development officer to serve on the library's executive cabinet or administrative council is critical to achieving fundraising (and consequently, project) success. A library would not think of installing new RFID-technology without checking with all of the parties that would possibly be affected; unfortunately, projects are often completely designed, or committed to, prior to the involvement of a development officer.

In many libraries, development professionals are currently not part of the management team, which sets or establishes priorities. In a 2003 survey of Academic Library and Development Network (ALADN) participants, less than 19 percent of the 28 library development officer respondents had a formal “seat at the table” for the executive cabinet (library director and associate directors) where many project-related discussions occur. Nevertheless, a good number of development professionals (68 percent of the respondents) were formal members of the administrative advisory council (director, associate directors, department heads, etc.) through which they were able to participate in policy and project related discussions.

With a potential voice at the table, a development officer could provide needed insight into the viability of a project involving potential donors. Critics might assert that development officers are not librarians and therefore would contribute little to discussions outside of their fiscally-driven purview. For the most part, development professionals – especially in university settings – are professionals with advanced degrees who might provide broad-based suggestions that would strengthen potential projects and improve possible marketing strategies and resulting publicity materials.

Competing demands

If your library is meeting both its goal for total dollars raised and its goals for priority projects, this is to be commended. However, many libraries may be missing one or both benchmarks. In some years a bequest windfall might burst the dollar goal thermometer, while not meeting your priority project goals. If this happens consistently, something may be off in addition to the numbers. It might be the projects. It might be the donor prospects. It might be the granting agencies or local interest groups your library approaches. It might be the development officer. It might be the economy. The situation is worth exploring to better ascertain what has occurred and to plan for the future.

Likewise, by consistently accepting gifts for projects suggested by donors or responding blindly to calls for proposals, your library may find itself engaged in projects not in keeping with its strategic plan. Such donor-driven projects can keep priorities and fundraising out of balance. This often happens with respect to collections; donor-specified gifts may indeed be wonderful but can usurp resources more in line with your institution's collections mission. Further, donations of equipment, or restrictive endowments, might be equally problematic for your library and more costly than saying no in the long run.

The question posed above – regarding the fundraising viability of a project – is truly a gray area. A needed endowment or planned renovation might not be attractive to donors. Multiple donors may have turned down the opportunity to support a particular project or priority. This does not make this project any less needed for your library. It may simply need to be funded from other revenue streams; it is also possible that the next donor might be the right fit with the project. It has been said that fundraising is both an art and a science – prospect identification for key projects is the perfect example of this phenomenon – but it does not eliminate the need to analyze the situation carefully if the issue of viability is raised.

Conclusion

Achieving balance between projects and fundraising belies the concept that either occurs regardless of the other. Fundraising and project generation must go hand-in-hand to ensure success. Thinking about fundraising at the beginning of a project is not about squelching groundbreaking ideas, innovative policies, or even hindering the academic process. Rather, it is about creating a successful action plan for achieving those groundbreaking and innovative projects.

Likewise, raising money with no clear direction or prioritization leads to aimless wandering and limited success. Balanced priorities and fundraising goals will provide strategic visioning, additional revenue streams, and limitless possibilities for your library.