Who Are We?

- Jenni Gaisbauer, CFRE, Executive Director
- Karen Beach, CFRE, Deputy Director
- 35+ years of combined fundraising experience
- Worked in the arts, sciences, museums, human and health services, and sport organizations
Charlotte Mecklenburg Library

- County Has More Than 1 Million Residents
- Library is 110+ years old
- 20 Locations
- $35M Annual Budget
- 450 Employees
- More than 680,000 People Used the Library in 2015
Top 10 Lessons Learned
Starting the Charlotte Mecklenburg Library Foundation
Purpose...
To Be or Not to Be

Advocacy

Volunteers

Programs

$$$

Politics/Legal

Visibility
2 Buy In

- Multiple Perspectives
- Fits Your Community
- What’s in a Name
- More than 1 Support Organization
# Example – Organizational Structure Options

<table>
<thead>
<tr>
<th>Description</th>
<th>Option 1: Expand Existing Public Charity</th>
<th>Option 2: Create New Public Charity</th>
<th>Option 3: Create New Public Charity - Supporting Organization of FFTC (Type I Supporting Org)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Tax Exempt Status</strong></td>
<td>501c3; Public Library</td>
<td>501c3; Public Charity</td>
<td>Shares Public Charity status with community foundation, Foundation For The Carolinas</td>
</tr>
<tr>
<td>Current legal name:</td>
<td>Current legal name: Friends of the Public Library of Charlotte &amp; Mecklenburg County, Inc. – could be renamed.</td>
<td>i.e., Charlotte Mecklenburg Library Foundation or some other named organization</td>
<td></td>
</tr>
<tr>
<td><strong>Current Primary Purpose</strong></td>
<td>Broad grassroots support through fundraising events; General Advocacy and specific public support advocacy; Mechanism for accepting corp/fdn gifts and grants if donor unable to give directly to Library</td>
<td></td>
<td>FFTC Supporting Organizations have generally been nonprofits that focus on raising endowment funds (not annual funds), but this doesn’t have to be the case.</td>
</tr>
<tr>
<td><strong>Advantages of this Option</strong></td>
<td>a) Organization already exists; no time needed for legal establishment &amp; IRS review.</td>
<td>a) Fresh start in building new organization including board members.</td>
<td>a) Fresh start in building new board members, and requires FFTC’s approval (see below)</td>
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<tr>
<td></td>
<td>b) Build upon Friends successful &amp; visible 2010/2011 activities.</td>
<td>b) Could provide solid focus on soliciting larger gifts, including endowment building, and not have time fragmented by also focusing on grassroots fundraising (booksales &amp; runs) – though must also build individual giving at all levels.</td>
<td>b) Library benefits from FFTC’s high level of confidence &amp; trust among major donor community, and also professional oversight of fund investment &amp; management as needed.</td>
</tr>
<tr>
<td></td>
<td>c) Current board has higher aspirations related to generating funding support for Library.</td>
<td>c) Provides tax-exempt organization for soliciting and receiving grants &amp; contributions from corporations and foundations.</td>
<td>c) Library has current endowment at FFTC that could become basis for new supporting organization</td>
</tr>
<tr>
<td></td>
<td>d) Keeps development strategies coordinated through/by 1 organization – for more effective staff &amp; resource utilization.</td>
<td>d) Provides distinct organization for advocacy (esp. for public funding) that is separate from Library.</td>
<td>d) Could provide solid focus on soliciting larger gifts, including endowment building - - though it would be possible to also raise annual support needed by Library.</td>
</tr>
<tr>
<td></td>
<td>e) Provides tax-exempt organization for soliciting and receiving grants &amp; contributions from corporations and foundations.</td>
<td>e) Have library resources (fundraising staff, finance, communications) that could potentially support work of new public charity</td>
<td>e) Provides tax-exempt organization for soliciting and receiving grants &amp; contributions from corporations and foundations.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>f) Could continue to use FFTC for endowment funds investment strategies/management.</td>
<td>f) FFTC has backoffice staff (admin, finance) that could, for a fee, provide those staffing needs of a Supporting Organization.</td>
</tr>
</tbody>
</table>
Compromise

- Way to Gain Buy-In
- Time Required
- Current-Proposed-Benefits
- Possible Compromise Areas
  - Governance
  - Money/Control of Money
  - Name and Logo
Right People
Right Seats

- Fundraising is a Profession (AFP)
- Specific Skill Sets are Needed
- Library Director Needs to Support and Engage in Fundraising Activity
- Volunteer Leadership Recruitment Crucial to Success
- Use of Interns
- Staffing for the Future
5 

Takes $$$ to Raise $$$

- Commit to Fundraising Activity in Overall Budget
  - Ex: staffing, consultants, database, stationary, stewardship activities, event expenses, solicitation mailings, etc.
- Library Commits 2% of its Overall Budget to Fundraising
  - Includes salaries, benefits, and cost of raising money
- Secure Sponsorship Dollars and In-kind Support to Supplement Fundraising Budget
Telling the Story vs. Selling the Story

- Brand Alignment
- Library’s M&C Team Share Services and Programs
- Foundation Shares the Impact those Services and Programs have on the Community
- Foundation has Its Own Staff Member Designated to Sell the Story
- Beginning to Break Down the Silos
Pulse of the Community

- External Sensor
- Opportunities for Library Partnerships
- Supporter but Non-User Perspective
- Board Member Connections vs. Trustee Connections
Prioritize

- Future of the Library Task Force
- Library Strategic Plan
- Resources & Capacity
- Annual vs Longer-Term Priorities
Set Realistic Goals

- Goals are Rooted In:
  - priorities
  - case or story
  - historical trends
  - staffing
  - community landscape

- Should Be Attainable, Especially First Year

- Build on Every Year

- Be Aware of One-Time Gifts/Grants
Make it Known

- Communicate Early and Often to Current Supporters of the Change of New Structure
- Set the Tone for Success with an Official Launch
- Create Consistent Communications Targeted at Different Audiences—Grassroots, Major Donors, Corporate Community, Foundations, etc.
- Create Events and Programs to Raise $$$ and Profile of Library
- Encourage Grassroots Efforts-Friends Council
CELEBRATE!
Contact Information

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