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Marilyn K. Moody

*Portland State University*, [marilynmoody@pdx.edu](mailto:marilynmoody@pdx.edu)

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# Communicating with Library Donors

by **Marilyn K. Moody**  
Dean, University Library  
Portland State University  
marilynmoody@pdx.edu



MARILYN K. MOODY

Marilyn is the Dean of the University Library and Professor at Portland State University, a position she has held since 2012. As Dean, she provides leadership for a vibrant 21st century library supporting research, teaching, and learning at Portland State University. Moody's professional interests include academic library administration, mobile learning, open educational resources (OER), textbook affordability, institutional repository services, government information, and scholarly communications. Moody has published and presented on a broad range of topics. She is the co-author with Jean L. Sears of three editions of the reference work *Using Government Information Sources*. Moody has a Bachelor of Arts in Teaching of Social Studies and a Master of Science in Library Science from the University of Illinois.

## Introduction

How do you communicate effectively with donors and potential donors? What does that communication look like? Libraries often envision donor communications as including only direct fundraising requests. Communications with donors, however, encompass a wide range of activities, is ongoing, and may even span decades with an individual donor. Library staff not directly involved with fundraising may not even think about donors as part of their user audience, but almost everyone who works in a library has a potential role in communicating with donors. Think, for example, about the potential impact of the message donors receive when viewing a library's website or in reading an online news item about a library's successful program.

*As Crumpton (2012) wrote:*

Library Administration including Development Officers, Fundraisers and Campaigners need the support of everyone in the library to help meet the goals of fundraising and development activities. Although the majority of staff might believe that they have minimum exposure to donors or potential donors, the impact of staff can be significant. A thorough understanding of development activities and a good stewardship of the organization's assets, goals and objectives as well as the reputation and character of the libraries', can all be impacted by staff in their daily routines and actions. (p. 30)

In this article, I'll briefly describe the essentials for understanding the development process and touch on basic donor communications strategies applicable to any Oregon library and any library staff who have contact with donors. I strongly believe the most important aspect of working with donors is developing a strong relationship with the donor—communicating effectively and consistently is an important part of developing that relationship. As part of your communication strategy, take advantage of opportunities to convey to donors the great things happening in your library. This is an important way to create and maintain these strong and positive donor relationships.



Communications targeted specifically to individual donors take on many different forms: talking face-to-face, phone calls, texting, e-mailing, and a wide range of formal and informal written communications. Communicating with donors might use such varied items as a casual conversation over coffee, thank you notes, fundraising proposals, news items (including e-formats, social media, and print communications), or ongoing e-mail conversations.

### The Development Process

It is helpful to understand a few basic development/fundraising concepts when interacting with donors. Knowing what you are trying to accomplish and what stage your donor may be at in the development process are important considerations. This does not need to be a complicated analysis, but it should be a thoughtful one. It influences how you tailor your communications as well as helping to shape the method of the communication.

Some of the major aspects of the fundraising process for libraries are research, cultivation, solicitation, and recognition (Wedgeworth, 2000, p. 538). Another stage of the process often included as a separate stage is stewardship. For our purposes, let's describe these development stages as:

- **Identifying Donors** (research about donors)
- **Cultivation** (developing the relationship with a donor)
- **Asking Donors to Give** (solicitation)
- **Thanking and Acknowledging Donors** (recognition)
- **Stewardship** (ongoing maintenance of the relationship with a donor; may also include recognition)

Your communication efforts may be more general in approach or specifically aimed at donors in one stage of this process. For example, when thanking and acknowledging donors, you might consider the following questions:

What do you know about the donor and how might you match the “thank you” to their preferences? Is a hand-written note most desirable? A formal letter of thanks? E-mails, text messages, or phone calls? Public recognition on a library donor list? An invitation to a special event or experience communicated as a thank you? In the case of a major gift, is there a naming opportunity for an endowed fund or a physical space in the library? Is that meaningful to the donor?

### What are the Major Types of Giving from Individual Donors?

In thinking about individual donors, some of the most common giving categories include annual giving, planned giving, major gifts, and gifts-in-kind. Understanding the different types of giving helps to devise communication best suited to each one of these categories of giving.

- **Annual Giving**—Annual giving is, as it sounds, giving that is meant to be a part of an annual or periodic cycle. Annual giving helps libraries identify donors, stay connected with their donors, provides the opportunity for repeat giving and encourages donors to consider larger gifts or planned giving opportunities. (CASE, 2013a.)



- **Planned Giving**—Planned giving takes on various forms, with one of the basics being a bequest (a charitable gift from an estate). A variety of other ways of making planned gifts include such financial vehicles as annuities, trusts, IRA Charitable Rollovers and charitable gift annuities. (Portland State University Foundation, n.d.)
- **Major Gifts**—The definition of what level of giving is defined as a major gift will vary from library to library. Typically, a gift larger than a certain amount is identified as a major gift and donors who have the potential financial capacity, organizational affinity, and interest to give at that level will be considered as potential major gift donors. (CASE, 2013b.)
- **Gifts-in-Kind**—Gifts-in-kind are non-cash gifts of physical property. For libraries, the donation of books is one common form of gifts-in-kind, but gifts-in-kind might include the gift of such items as artwork, equipment, furniture, or other tangible personal property. (Portland State University. University Financial Services, n.d.)

Match your communication to the type of giving you're seeking. A written general appeal to donors for an annual gift campaign looks different than talking one-on-one to a donor interested in planned giving. A proposal for a major gift from a donor who has made annual gifts for the last five years has different aims than a social media campaign for first-time donors.

### **Develop Key Library Messages and Elevator Speeches**

One useful approach to donor communication is to think about and develop key library messages for your library. A few examples of key donor-oriented messages used at Portland State University Library include:

- When you support the Library, you're supporting PSU.
- The Library Fund helps us maintain our role as **the center of an engaged urban campus**. We listen to our students and make changes to spaces, offer new services, and purchase new books based on their feedback. I work with our faculty and staff to prioritize special or critical projects for the year, and the Library Fund gives us the flexibility to make those ideas a reality.
- The Library collects books, journals and other materials in every PSU discipline and beyond—from computer science and engineering to art history and contemporary Middle East literature. Subject librarians develop expertise in all of these areas and beyond.
- Library holdings tell the story of Portland and Oregon, through University Archives, special collections, and faculty and student scholarship.

Do you have a donor “elevator speech?” When you have a limited amount of time to convey your library message, what do you say? I find that this happens in unexpected settings (not usually an elevator!), and it's helpful to prepare ahead for questions such as: “What does



the library most want to accomplish?” “What’s exciting at the library these days?” or even “I’d like to give the library a gift to support this area—what are the possibilities?”

### **Listen to Your Donors and Understand Their Passions, Values, and Interests**

You may feel that your library is in desperate need of something and that item is what you should ask a donor to support. The approach is more often the opposite one—what is the donor passionate about and how does that possibly match with the library’s vision and goals?

Donors often give because of their passion or interest in an area, and they also give to what is important to them. Or they perceive that they can match their own values to library values and that their giving is a win/win situation for both the donor and the library. Or a donor may feel that a donation to the library translates to investing in a cause that is important to them. For example, here are two of PSU Library’s donors, Robin and Robert Holmes, talking about why they give to Portland State:

‘We’re focusing on PSU because we believe in the concept of an urban university, and we believe in PSU’s ability to provide education in a wide variety of fields,’ Robin said. ‘I believe the broader your education—and that includes an education in the arts—the more able you are to solve problems, whatever your profession,’ Robert Holmes explains. (Portland State University Library, n.d.)

Discover an individual donor’s passion or interest and then help the donor see how the library is impactful or even transformative in that area. Tell them the impact and reach their gift will have to the library, to library users, and the broader community. Take the time to listen carefully to your donors. Then respond to what you have learned about your donor—donors give to what is important to them and support organizations that match their values and vision for the future.

### **Tell Your Library and Donor Stories**

People enjoy stories—they add a human element that makes talking about your library and its goals, impact, and value more understandable. Stories that talk about how your library has impacted a person’s life attract attention and can be a method of drawing donors in to learn more. Facts and figures are useful, but stories can make their meaning more powerful. For example, one of our library appeals started out with this story:

Our students are truly amazing—students like Victor Mena, active in student government, going to school full-time, and working many hours per week. Victor has a special passion for the Library and the ways in which we support his fellow students. Things like keeping the library open 24 hours at the end of the quarter, providing textbooks on library reserve, and creating collaborative group study spaces are all on the minds of students today. Victor is one of our strong student partners helping us to make a difference at PSU.

Donors may also be willing to have their own stories told as a way to encourage others to give to your library. One of our donor spotlights in our library newsletter told the



story of a generous donor, Bob Rawson, and stated “Bob donates to the Library because it ‘benefits all students, regardless of their major, regardless of their interests.’” A further sidebar then gave more information about charitable gift annuities, one of the ways that Bob Rawson has provided support to the Library. (Portland State University Library, 2014).

### Conclusion

Use your donor communications to build strong and ongoing relationships with your donors. Consider how general communications with users also include donors and potential donors as your audience. Listen to your donors, discover their passions, interests and values, and match communications to individual donors according to their preferences and place in the development process. Tell your library story and let donors know about your library! 

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