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>> WELCOME TO THE WEBINAR.

>>

>> OKAY, HELLO, EVERYBODY.

WELCOME TO TODAY'S WEBINAR MY NAME IS MIKE MORTAR KNOW, I'M WITH LEARNING TIMES.

IT'S A PLEASURE TO BE HERE WITH YOU TODAY.

I'LL BE YOUR TECHNICAL PRODUCER.

WE'RE GOING TO GET STARTED IN EARNEST IN ABOUT TWO MINUTES BUT I'D LIKE TO TAKE JUST A MOMENT OF YOUR TIME TO GO THROUGH A FEW OF THE FEATURES OF ADOBE CONNECT FOR THE BEN FIT OF THOSE OF YOU WHO'VE NEVER USED IT BEFORE.

FOR TODAY'S SESSION, JUST AS A NOTE, TODAY'S CHAT WILL BE UNMODERATE SOD YOU CAN FEEL FREE TO SUBMIT ANY COMMENTS OR QUESTIONS IN THE CHAT WINDOW AND WE'LL TRY TO RESPOND AS QUICKLY AS I CAN.

AND WE WILL TAKE THOSE QUESTIONS AND THEN PUT THEM IN A PARKING NOT THEY CAN'T BE RESPONDED TO AT THAT POINT IN TIME.

FOR THOSE OF YOU WHO HAVE NEVER USED ADOBE CONNECT BEFORE, YOU'LL SEE THAT THE CHAT WINDOW IS LOCATED AT THE LOWER LEFT OF YOUR SCREEN.

IT OPERATES MUCH IN THE SAME MANNER AS ANY OTHER INSTANT MESSAGE APPLICATION.

SIMPLY TYPE YOUR MESSAGE IN THE BOX -- IN THE FIELD PROVIDED AT THE BOTTOM OF THE BOX AND YOU CAN EITHER CLICK ON THE LITTLE VOICE BUBBLE ICON OR HIT ENTER OR RETURN OR YOUR KEYBOARD AND YOUR MESSAGE WILL BE SUBMITTED ACCORDINGLY.

IF ANYBODY HAS ANY ISSUES OF TECHNICAL NATURE, PLEASE FEEL FREE TO LET US KNOW IN THE CHAT WINDOW, WE'LL RESPOND AS QUICKLY AS WE CAN.

IF AT ANY POINT IN TIME YOU LOSE CONNECTIVITY OR PERHAPS YOU'RE EXPERIENCING AN ECHO, IT COULD BE ONE OF TWO THINGS.

FOR THE CONNECTIVITY IF YOU'RE ON WIRELESS, SOMETIMES PEOPLE CAN LOSE THEIR CONNECTION. TRY TO CLOSE OUT AND LOG BACK IN AND YOU SHOULD BE SET.

IF YOU ARE EXPERIENCING AN ECHO, THERE'S A POSSIBILITY YOU ARE LOGGED IN TWICE.

WE CAN SEE ALREADY WE'RE ALMOST AT 250 PEOPLE JOINING US AT THE MOMENT AND THERE'S QUITE A FEW PEOPLE WHO HAVE LOGGED IN TWICE.

IF THERE IS AN ECHO, CLOSE OFF ONE OF YOUR CONNECTIONS AND AND THE AUDIO WILL CLEAR UP ALMOST IMMEDIATELY.

IF YOU DON'T THINK YOU'RE CONNECTED TWICE, JUST SEND US A CHAT AND WE'LL CLOSE OFF ONE OF THE CONNECTIONS WITH YOU AND TRY TO WALK YOU THROUGH WHAT ONE OF THE POTENTIAL ISSUES COULD BE.

KOUT FURTHER DELAY WE ARE NOW AT THE TOP OF THE HOUR.

AND IT HAD RECORDING HAS STARTED AND WILL BE AVAILABLE IN THE NEAR FUTURE AS WELL AS THE CLOSED CAPTIONING TRANSCRIPTS WILL ALSO BE AVAILABLE FOLLOWING THE END OF THE SESSION.

I'D LIKE TO NOW PASS THE AUDIO OFF TO YOUR HOST, JENNY ARENA, FROM THE -- EXCUSE ME, FROM HERITAGE PRESERVATION AND OUR PRESENTER AS WELL, KELSEY SCOUTEN BATES.

AND SO JENNY AND KELSEY, IF YOU WOULD LIKE TO GO AHEAD, WHENEVER YOU'RE READY.

>> GREAT, THANK YOU SO MUCH, MIKE.

SO WELCOME, EVERYONE, TO OUR FIRST WEBINAR IN OUR FIRST FUND-RAISING FOR COLLECTIONS CARE. AS MIKE SAID, I'M JENNY ARENA WITH HERITAGE PRESERVATION.

SO HAPPY SO MANY OF YOU MADE IT OUT TODAY IT LOOKS LIKE WE HAVE 245 PEOPLE WHO HAVE LOGGED IN AND AS YOU CAN SEE IN THE CHAT EVERYONE IS COMING FROM EVERYWHERE.

FEEL FREE TO CONTINUE SAYING HELLO IN THIS CHAT BOX.

AS MIKE SAID IT WILL BE AN OPEN CHAT TODAY SO WE WON'T BE MODERATE SOD FEEL FREE TO KEEP QUESTIONS COMING TO MAKE SURE WE GET ANSWERS TO YOU.

AS MANY OF YOU PROBABLY ALREADY KNOW, THIS IS JUST ONE COURSE IN OUR SERIES "CARING FOR YESTERDAY'S TREASURES TODAY."

FIVE COURSES HAVE ALREADY BEEN HELD EARLIER THIS YEAR.

IF YOU MISSED THOSE KOURSZS OR YOU'RE JUST SIMPLY INTERESTED IN GOING BACK THROUGH THE MATERIAL, EVERYTHING IS ARCHIVED ON THE ON-LINE COMMUNITY FROM WEBINAR RECORDINGS TO RESOURCE LINKS.

SO MAKE SURE TO CHECK THAT OUT.

IT'S A FANTASTIC RESOURCE.

WE ARE INCREDIBLY GRATEFUL TO THE INSTITUTE OF MUSEUM AND LIBRARY SERVICES FOR MAKING THESE COURSES AVAILABLE.

THE SERIES HAS BEEN MADE POSSIBLE BY A LAURA BUSH 21st CENTURY LIBRARIAN GRANT FROM I.M.L.S. AND WE'RE FORTUNATE TO HAVE LEARNING TIMES AND MIKE ON BOARD FOR THIS PROJECT FOR BOTH WEB SIDE AND WEBINAR SUPPORT.

SO I'M GOING TO TRY TO QUICKLY GO THROUGH SOME LOGISTICS OF THE COURSE AND I PROMISE IN THE FUTURE MY INTRO WILL BE MUCH SHORTER.

SO AS YOU KNOW TODAY IS JUST PART ONE OF THIS FIVE-PART COURSE AND THEN AFTER TODAY OUR NEXT WEBINAR WILL BE THIS WEDNESDAY, THE SAME TIME AND SAME PLACE.

LIKE OUR OTHER COURSES, YOU'RE DEFINITELY ABLE TO EARN A CERTIFICATE OF COMPLETION AND ALSO THAT DIGITAL CREDENTIAL FOR PARTICIPATING AND TO DO SO WE ASK A FEW THINGS FROM YOU.

THE FIRST -- AND MIKE IS SAYING I NEED TO SPEAK UP SO I WILL DO MY BEST.

THE FIRST IS WE ASK THAT YOU REGISTER.

THE REGISTRATION PAGE LOOKS LIKE THIS, SO HOPEFULLY THAT LOOKS FAMILIAR TO YOU.

IF THIS PAGE DOESN'T LOOK FAMILIAR TO YOU OR YOU DIDN'T RECEIVE AN E-MAIL REMINDER ON THURSDAY, GO AHEAD AND SHOOT US AN ISSUE -- E-MAIL, THERE MIGHT HAVE BEEN AN ISSUE.

BUT REGISTRATION IS THE ONLY WAY TO TRACK PARTICIPATION SO YOU WANT TO MAKE SURE YOU'RE ALL SIGNED UP.

WE ALSO ASK THAT YOU WATCH ALL FIVE OF OUR WEBINARS AND WE UNDERSTAND THAT IS NOT ALWAYS POSSIBLE TO DO LIVE, ALTHOUGH WE LOVE HAVING YOU ALL SIGNED IN TODAY.

WE DO ASK THAT YOU WATCH THE RECORDING IF YOU CAN'T COME TO THE LIVE EVENT.

WE WILL SEND AN E-MAIL TO ALL OUR REGISTERED PARTICIPANTS AFTER EACH LIVE WEBINAR WITH A LINK TO THAT DAY'S RECORDING SO YOU CAN DEFINITELY KEEP UP THAT WAY.

THE E-MAILS WILL COME FROM HERITAGE PRESERVATION SO MAKE SURE WE'RE NOT BEING THROWN INTO YOUR SPAM FILTER AND IF YOU'RE NOT RECEIVING THESE E-MAILS LET US KNOW SO WE CAN FIGURE THAT OUT.

AND THE FINAL REQUIREMENT IS TO COMPLETE ALL FIVE HOME WORK ASSIGNMENTS.

AT THE END OF EACH WEBINAR, WE'LL POST A LINK TO THAT DAY'S HOME WORK ASSIGNMENT.

WE'LL ALSO E-MAIL YOU THAT LINK, AND THE LINK CAN ALSO BE FOUND ON THE COURSE HOME PAGE.

I WILL JUST NOTE THAT THESE AREN'T GRADED ASSIGNMENTS SO PLEASE, PLEASE DON'T STRESS ABOUT THEM.

OUR INTENT WAS TO JUST GET YOU THINKING CRITICALLY ABOUT THE TOPICS SO SIMPLY DO YOUR BEST.

AND THEN YOU DON'T HAVE TO WORK TOWARDS A CERTIFICATE, BUT IF YOU ARE INTERESTED, EVERYTHING IS DUE BY MONDAY, OCTOBER 14.

SO ALL THOSE HOME WORK ASSIGNMENTS.

IF YOU ARE A CERTIFIED ARCHIVIST THIS COURSE IS ELIGIBLE FOR FIVE CONTINUING EDUCATION CREDITS, AND MORE INFORMATION CAN BE FOUND ON THEIR WEB SITE.

SO THE COURSE HOME PAGE ON THE ONLINE COMMUNITY IS WHERE YOU'LL FIND EVERYTHING THAT YOU NEED FOR THIS COURSE.

OUR INSTRUCTORS HAVE COMPILED AND ARE STILL COMPILING SOME REALLY GREAT RESOURCES AND RECOMMENDED READING.

YOU'LL ALSO FIND A P.D.F.

HANDOUT OF THE POWERPOINT FOR EACH WEBINAR, LINKS TO THE HOME WORK ASSIGNMENT, AND A TRANSCRIPT OF THE CLOSED CAPTIONING.

AND THEN, OF COURSE, AS SOON AS THIS COURSE HAS CONCLUDED, THIS IS WHERE WE'LL POST ALL

THE LINKS TO THE WEBINAR RECORDINGS.  
BUT FOR RIGHT NOW WE'RE RESERVING THOSE RECORDINGS JUST TO OUR REGISTERED PARTICIPANTS.  
SO I DO WANT TO INVITE EVERYONE TO JOIN THE ONLINE COMMUNITY, YOU DEFINITELY DO NOT HAVE  
TO PARTICIPATE IN THIS COURSE, BUT WE HAVE SEEN A LOT OF YOU ALREADY SIGN UP.  
IT'S A GREAT RESOURCE AND BECOMING A MEMBER ALLOWS YOU TO INTERACT ON THAT DISCUSSION  
BOARD, TO POSE QUESTIONS, TO ANSWER QUESTIONS.  
SO CONSIDER JOINING.  
AND THEN, LAST BUT NOT LEAST, IF YOU HAVE QUESTIONS, PLEASE DON'T HESITATE TO CONTACT US,  
YOU CAN E-MAIL US, YOU CAN CALL US, THERE'S ALSO A CONTACT FORM ON THE WEB SITE.  
SO IF YOU FORGET THESE E-MAILS OR PHONE NUMBERS, YOU CAN ALWAYS FIND A SPOT TO ASK  
QUESTIONS ON THE ONLINE COMMUNITY.  
SO THAT'S IT!  
WE GOT THROUGH IT ALL!  
AND IT WILL BE SHORTER IN THE FUTURE, I PROMISE.  
SO WITHOUT FURTHER DELAY I WANT TO INTRODUCE TODAY'S INSTRUCTOR, KELSEY SCOUTEN BATES.  
KELSEY IS THE DIRECTOR OF DEVELOPMENT AT THE BIRMINGHAM, ALABAMA, PUBLIC LIBRARY WHICH  
HAS ONE OF THE LARGEST AND MOST NOTABLE SPECIAL COLLECTIONS IN THE COUNTRY.  
KELSEY HAS BEEN FUND-RAISING FOR MUSEUMS AND LIBRARIES FOR 15 YEARS AND HAS BUILT A WIDE  
RANGE OF EXPERIENCE AND INSTITUTIONS ACROSS THE COUNTRY.  
SHE ALSO HAS EXPERIENCE FROM THE OTHER SIDE OF FUND-RAISING, WHILE ADMINISTERING THE  
CONSERVATION ASSESSMENT PROGRAM GRANT FOR HERITAGE PRESERVATION.  
AND KELSEY WILL ALSO BE JOINING US AGAIN ON OUR THIRD WEBINAR IN THIS COURSE.  
SO YOU'LL HAVE A CHANCE TO SEE HER AGAIN.  
SO, KELSEY, I'M GOING TO GO AHEAD AND PULL UP YOUR POWERPOINT SO YOU SHOULD SEE IT THERE  
AND EVERYONE FEEL FREE TO CONTINUE ASKING QUESTIONS IN THE CHAT.  
WE'LL KEEP AN EYE ON THAT.  
JUST KEEP IN MIND THAT THERE WILL BE A RECORDING OF THIS WEBINAR, SO EVERYTHING YOU SAY  
WILL LIVE ON.  
SO IF IT'S SOMETHING YOU DON'T WANT EVERYONE TO SEE, MAKE SURE NOT TO POST IT.  
AND WE DO HAVE SOME COMMENTS, SOME PEOPLE DO FIND THE CHAT DISTRACTING AND THERE IS ONE  
VERY LOW-TECH SOLUTION AND IT'S TO JUST COVER THAT CHAT BOX WITH A PIECE OF PAPER AND SOME  
TAPE.  
BUT FEEL FREE TO KEEP ASKING QUESTIONS, LET US KNOW IF YOU HAVE ANY PROBLEMS WITH SOUND  
AND KELSEY, I'M GOING TO GO AHEAD AND HAND THINGS OVER TO YOU.  
>> OKAY, THANK YOU SO MUCH, JENNY.  
AND THANK YOU, EVERYONE, FOR JOINING ME TODAY.  
IT LOOKS LIKE WE'VE GOT OVER 300 PEOPLE RIGHT NOW LISTENING IN FROM ALL AROUND THE WORLD.  
SO THAT'S REALLY GREAT.  
AS JENNY SAID, TODAY WE'RE GOING TO TALK ABOUT THE BASICS OF FUND-RAISING.  
AND I IMAGINE AS THIS WEBINAR GOES ON OR THIS SERIES OF WEBINARS GOES ON WE'LL GET MORE  
AND MORE DETAILED AND MORE AND MORE NARROW IN WHAT WE TALK ABOUT.  
SO JUST REMEMBER THAT TODAY IS A BROAD OVERVIEW OF THE BASICS OF FUND-RAISING AND WE WILL  
-- I WILL DO MY BEST TO GEAR IT TOWARD COLLECTIONS CARE.  
BUT I WANT TO ALSO LEAVE IT BASIC ENOUGH TO LAY THE GROUND WORK FOR YOU TO CREATE A STRONG  
FUND-RAISING PROGRAM IN YOUR INSTITUTION OR IN YOUR DEPARTMENT.  
>> SO FIRST I WANT EVERYONE TO THINK FOR A MOMENT ABOUT HOW ASKING PEOPLE FOR MONEY MAKES  
YOU FEEL.  
AND LET'S JUST TAKE 15 SECONDS TO THINK ABOUT THAT.  
YOU CAN LIE BACK ON YOUR VIRTUAL COUCH OR THE COUCH IN YOUR OFFICE AND CLOSE YOUR EYES IF  
YOU'D LIKE AND THINK FOR JUST A MOMENT ABOUT ASKING SOMEONE FOR MONEY.  
HOW DOES THAT MAKE YOU FEEL?  
>> OKAY.  
SO I WANT TO TAKE A QUICK SURVEY AND I'D LIKE YOU TO CHOOSE THE ONE THAT CLOSELY -- MOST  
CLOSELY MATCHES WHAT YOU'RE THINKING.

HOW DOES ASKING PEOPLE FOR MONEY MAKE YOU FEEL?

THE FIRST ONE: EXHILARATED-- I WAKE UP EVERY MORNING READY TO MAKE THE ASK AND SAVE MY INSTITUTION.

NUMBER TWO: AMBIVALENT, I'M AMBIVALENT ABOUT ASKING PEOPLE FOR MONEY.

IT'S LIKE ASKING PEOPLE WHAT TIME IT IS.

NUMBER THREE: A LITTLE NERVOUS.

I WOULD BE FORCING MYSELF TO DO IT BUT I WOULD DO IT FOR A GOOD CAUSE.

THE LAST ONE: TOTALLY FREAKED OUT.

YOU WOULD RATHER ANYBODY ELSE ASK THE MONEY -- FOR THE MONEY FOR YOU INSTEAD OF YOU HAVING TO DO IT.

LET'S JUST TAKE ANOTHER SECOND HERE AND, YES, IT'S COMING OUT JUST TO WHAT I THOUGHT IT WOULD.

>> IT LOOKS LIKE NUMBER THREE "A LITTLE NERVOUS," IS HEAVILY FAVORED.

AND "TOTALLY FREAKED OUT" IS COMING IN AT A -- NOT TOO CLOSE OF A CLOSE SECOND BUT COMING IN SECOND.

OKAY.

I THINK MOST OF US PROBABLY FALL IN BETWEEN "C" AND "D" AND I WILL BE TOTALLY HONEST WITH YOU, I DO THIS FOR A LIVING AND I FALL IN BETWEEN "C" AND "D."

ASKING FOR MONEY DOES MAKE ME A LITTLE NERVOUS.

AND, I DON'T KNOW, MAYBE IT SHOULD.

BUT I HAVE SOME REALLY GOOD NEWS FOR YOU ALL TODAY, AND THAT IS THAT ASKING FOR MONEY IS ONLY A SMALL PART OF FUND-RAISING.

>> THERE'S MY QUIZ.

I'M GOING TO MOVE ON HERE TO THE NEXT ONE.

IN FACT, I REALLY HATE THE TERM "FUND-RAISING."

AND SO I'M NOT EVEN GOING TO -- I'M GOING TO TRY NOT TO EVEN USE IT ANYMORE DURING THIS WEBINAR.

I'M GOING TO TRY TO USE THE TERM -- EITHER "DEVELOPMENT."

OR I MIGHT ALSO -- WHOOPS, I'VE GONE TOO FAR.

>> "DEVELOPMENT," "ADVANCE."

OR EVEN "PHILANTHROPY."

I THINK THESE TERMS SPEAK TO A BROADER TYPE OF ACTIVITY THAT IS MORE THAN SIMPLY ASKING PEOPLE FOR MONEY.

WHAT I'M HOPING TO DO DURING THIS WEBINAR IN PART IS TO CHANGE YOUR PRE-CONCEIVED NOTIONS OF FUND-RAISING.

OKAY, I PROMISE THAT'S THE LAST TIME I'M GOING TO USE THAT WORD.

OR I'M GOING TRY.

I WANT YOU TO THINK OF THIS PROCESS AS SOMETHING MUCH LESS SCARY.

THINK OF IT NOT AS ASKING FOR MONEY BUT AS BUILDING RELATIONSHIPS WITH POTENTIAL SUPPORTERS.

>> ALTHOUGH GETTING SOMEONE TO WRITE YOU A CHECK IS AN END RESULT AND SOMETHING YOU HOPE TO ACHIEVE, BUILDING A RELATIONSHIP WITH A PERSON OR A FOUNDATION IS WHAT YOU'LL ACTUALLY BE DOING MOST OF THE TIME.

AND I THINK THAT IS MUCH LESS SCARY.

IN FACT, MOST OF YOU MIGHT ALREADY BE DOING IT.

YOUR RELATIONSHIPS WITH SUPPORTERS-- WHETHER THEY ARE ONE PERSON OR A GROUP OF TRUSTEES IN A FOUNDATION OR EVEN A CORPORATION-- WILL IDEALLY LEAD TO GIFTS THAT WILL CONTINUE TO GROW AND MAKE MORE OF A DIFFERENCE OVER TIME.

THIS SUPPORTER WILL HOPEFULLY BRING HIS OR HER FRIENDS AND FAMILY AND COLLEAGUES INTO THE CIRCLE OF YOUR ORGANIZATION AND WILL CONTRIBUTE TO YOU AND YOUR ORGANIZATION BECAUSE THEY LIKE YOU.

THEY LIKE WHAT YOU'RE DOING AND THEY WANT YOU TO SUCCEED AND HOPEFULLY ALSO THEY FEEL THAT YOU'RE DOING A GOOD JOB OF IT.

>> YOU'RE GOING TO SEE ME USE THIS SLIDE THAT I'VE JUST CLICKED OVER TO AT LEAST ONE MORE

TIME IN THIS SERIES OF WEBINARS.  
CERTAINLY WE'RE GOING TO FOCUS MORE ON HIT IN THE SECOND WEBINAR.  
BUT -- AND YOU ALSO MAY SEE SOME SIMILAR LANGUAGE AND TERMS USED IN SOME OF THE OTHER WEBINARS.  
BUT I WANT TO AT LEAST INTRODUCE YOU TO THIS CONCEPT, THIS IDEA THAT DEVELOPMENT IS A CYCLE.  
>> THE CYCLE STARTS WITH A RELATIONSHIP WITH INTEREST.  
SUPPORT ALWAYS BEGINS WITH INTEREST.  
FOR WHATEVER REASON, A SUPPORTER HAS INTEREST IN YOUR ORGANIZATION.  
MAYBE THEY HAVE USED YOU IF YOU ARE A LIBRARY, MAYBE YOU'VE HELPED THEM IN SOME WAY TO RESEARCH THEIR LATEST BOOK.  
MAYBE THEY GET SOMETHING OUT OF BEING ASSOCIATED WITH YOU, PERHAPS A GOOD FEELING.  
MAYBE EVEN A SENSE OF STATUS IN SOME SITUATIONS.  
MAYBE THEY HAVE VOLUNTEERED WITH YOU IN THE PAST.  
MAYBE THEY HAVE RECENTLY GIVEN YOU THEIR COLLECTION OF HISTORIC RECIPE BOOKS OR THEIR FAMILY'S MEMOIR.  
FROM INTEREST WE MOVE ON TO THE SECOND ONE.  
A SUPPORTER, SOMEONE WHO DONATES MONEY, WILL HAVE THE CAPACITY TO GIVE, THE ABILITY TO GIVE.  
EVEN IF THEY GIVE IT A LOW LEVEL THEY HAVE RESOURCES THAT CAN BE EXPENDED ON YOUR ORGANIZATION.  
OKAY?  
SO MONETARY SUPPORTERS HAVE BOTH INTEREST, THEY HAVE THE ABILITY TO GIVE.  
THIRDLY, THEY HAVE THE INCLINATION TO GIVE.  
SO A SUPPORTER WHO WILL DONATE MONEY, THERE'S A LIKELIHOOD THAT THEY'LL GIVE BECAUSE THEY ARE A GIVING PERSON.  
BECAUSE THEY GIVE TO ORGANIZATIONS LIKE YOURS.  
AND THEY BELIEVE THAT THEIR MONEY WILL MAKE SOME SORT OF DIFFERENCE FOR YOUR INSTITUTION OR PROJECT.  
SO WHEN YOU'RE THINKING ABOUT DEVELOPMENT, THESE ARE THE THREE KIND OF INGREDIENTS THAT EQUAL MONETARY SUPPORT.  
THESE THREE COMPONENTS ARE WHAT GO INTO A DONOR GIVING A GIFT.  
AND NOTICE THAT THIS IS A SICKLE THAT DOESN'T STOP WITH THE GIFT.  
ONCE SOMEONE GIVES YOU A GIFT, THE CYCLE CONTINUES SO THAT YOUR DONOR MAINTAINS INTEREST IN THE ORGANIZATION, MAINTAIN IT IS ABILITY TO GIVE, AND MAINTAINS AND INCLINATION TO GIVE.  
IT CONTINUES AROUND AND ROUND.  
SO THIS REQUIRES NOT ONLY WORK ON THE PART OF THE DONOR BUT ALSO WORK ON THE PART OF THE STAFF.  
SO REMEMBER THIS AND WE'LL PROBABLY COME -- I'M SURE WE'LL COME BACK TO IT.  
SO IN SHORT, RATHER THAN THINKING ABOUT A DONOR GIVING YOU MONEY, THINK OF A DONOR BECOMING A FRIEND OF YOUR ORGANIZATION AND WANTING TO SEE THAT ORGANIZATION SUCCEED, SHARING THE WEALTH, AND PROVIDING BENEFITS FOR OTHERS IN YOUR COMMUNITY.  
>> BEFORE WE DELVE INTO SOME DIFFERENT TYPES OF DEVELOPMENT TOOLS TO HELP YOU GIVE YOUR SUPPORTERS A VARIETY OF WAYS TO GIVE, I WANT TO GIVE YOU ALL A FEW BROAD CONCEPTS TO REMEMBER AS YOU MOVE FORWARD DEVELOPMENT.  
I HOPE THESE WILL GUIDE YOU AS YOU MAKE DECISIONS ABOUT WHERE TO PUT YOUR LIMITED RESOURCES AND ENERGY AND I'M SURE THAT MOST OF YOU WILL SAY THAT YOUR RESOURCES AND ENERGY IN YOUR INSTITUTIONS ARE LIMITED.  
>> FIRST OF ALL, WE'RE GOING TO START HERE AT THE LEFT.  
IF YOU WILL GET THE MOST AMOUNT OF MONEY OVER TIME FROM INDIVIDUALS.  
FROM PEOPLE.  
NOT THE GOVERNMENT, NOT FOUNDATIONS, BUT FROM PEOPLE WHO BELIEVE IN WHAT YOU ARE DOING, WHERE YOU ARE DOING IT AND HOW YOU ARE DOING IT.

THEY WILL SUPPORT YOU IDEALLY OVER TIME AND WITH INCREASED MAGNITUDE.  
YOU'RE LOOKING FOR LOYAL PEOPLE WHO HAVE WORKED YOU INTO THEIR ANNUAL GIVING ROUTINE AND YOU MUST KEEP THEM CONNECTED TO YOUR ORGANIZATION SOMEHOW.  
ON AVERAGE, FOR MOST INSTITUTIONS, 80% OF CONTRIBUTED DONATIONS COME FROM INDIVIDUALS.  
80%.

A SECOND TRUTH ABOUT DEVELOPMENT-- AND YOU'LL HEAR DEVELOPMENT PEOPLE SAY THIS A LOT, THEY LOVE TO SAY IT BECAUSE IT'S TRUE-- PEOPLE GIVE TO PEOPLE.  
I AM MORE LIKELY TO GIVE TO MY LOCAL RADIO STATION, MY LOCAL PUBLIC RADIO STATION BECAUSE MY FRIEND JUST BECAME THE NEWS DIRECTOR THERE AND SHE HAS ASKED ME TO CONTRIBUTE.  
YES, I ALREADY LIKE WHAT THEY DO I HAVE THE INTEREST, AND THEY DO IT WELL, BUT MY RELATIONSHIP WITH HER IS WHAT GOT ME TO WRITE THE CHECK.  
SO WHEN YOU GET PEOPLE INVOLVED, WHEN YOU HAVE A RELATIONSHIP WITH THEM, YOU ARE MORE LIKELY TO GET A GIFT AS AN END RESULT.  
AND WHEN YOU ARE TRYING TO DECIDE WHO TO ASK FOR MONEY FROM THE FIRST PLACE YOU'RE GOING TO LOOK ARE THE PEOPLE THAT YOU ALREADY KNOW, THE PEOPLE WHO ARE ALREADY SOMEHOW CONNECTED TO YOU OR TO YOUR ORGANIZATION.

>> THE NEXT ONE, FUND-RAISING IS AN ART, NOT A SCIENCE.  
AND YOU MUST BE WILLING TO TRY THINGS AND SEE HOW THEY WORK.  
THEY MAY NOT WORK WELL AT ALL.  
YOU MAY HAVE TO TRY SOMETHING AND IT FAILS MISERABLY.  
IF IT DOES, YOU HAVE LEARNED SOMETHING ABOUT YOUR CONSTITUENCY, YOUR INSTITUTIONS, AND YOU CAN MOVE ON TO SOMETHING ELSE.  
YOU CAN CHANGE OR REFINE YOUR APPROACH.  
I HAVE TRIED THINGS AT ONE INSTITUTION THAT DID NOT WORK AT ALL IN ANOTHER.  
FOR EXAMPLE, NOT EVERY INSTITUTION SHOULD HAVE A MEMBERSHIP PROGRAM.  
AND MEMBERSHIP PROGRAMS VARY BY INSTITUTION.  
SO WHAT ONE MUSEUM DOES MAY NOT BE THE BEST FOR ANOTHER MUSEUM.  
I WORKED FOR A MUSEUM IN FAR WEST TEXAS THAT HAS AN EXTRAORDINARILY SMALL COMMUNITY, UNDER 2,000 PEOPLE, WITH THE CLOSEST CITIES BEING 200 MILES OR MORE AWAY.  
THE MEMBERSHIP PROGRAM THERE LOOKED COMPLETELY DIFFERENT FROM ANOTHER MUSEUM THAT I WORKED IN IN A MAJOR CITY ON THE EAST COAST.  
EVEN THOUGH THEY'RE BOTH MUSEUMS THEY'RE BOTH ART MUSEUMS, THEY HAD COMPLETELY DIFFERENT COMMUNITIES.  
SO YOU HAVE TO THINK ABOUT YOUR AUDIENCE WHEN YOU'RE CREATING A PROGRAM.  
A DEVELOPMENT PROGRAM.  
AND YOU HAVE TO GO WITH THE FLOW.  
I MEAN, YOU HAVE TO DO WHAT FEELS RIGHT, AND IF IT DOESN'T WORK TRY SOMETHING ELSE.  
LATER IN THIS WEBINAR WE'LL TALK ABOUT HOW TO PUT TOGETHER A DEVELOPMENT PLAN.  
AND ONE THING THAT'S CRUCIAL ABOUT A DEVELOPMENT PLAN IS THAT IT'S PROBABLY GOING TO CHANGE SOMEWHERE AT LEAST HALFWAY THROUGH THE YEAR IF NOT MORE.  
>> SO BE FLEXIBLE AND PROBABLY THE TRICK HERE IS ALSO CONVINCING YOUR ADMINISTRATION OR YOUR BOARD TO BE FLEXIBLE.  
AND THAT CAN BE THE HARDEST THING.  
BUT DEVELOPMENT PLANS SHOULD NOT BE SET IN STONE.  
FOR FOUR, THE ACTUAL PART WHERE YOU ASK FOR MONEY, WHERE YOU SIT DOWN AND ASK SOMEONE TO GIVE YOU A DONATION, THAT WILL BE THE THING THAT YOU SPEND THE AT LEAST AMOUNT OF TIME ON.  
PLANNING, RESEARCH AND CULTIVATION ARE GOING TO BE THE MOST TIME-INTENSIVE AND IMPORTANT ACTIVITIES YOU CAN ENGAGE IN WITH DEVELOPMENT.  
YOU ARE DEVELOPING YOUR SUPPORTERS.  
YOU'RE ASKING THEM FOR -- ASKING -- THE PART WHERE YOU'RE ASKING THEM FOR MONEY IS A VERY SMALL ACTIVITY IN TERMS OF ENERGY AND TIME SPENT.  
AS A GENERAL RULE, 80%-- AGAIN, YES, 80% IS THE KEY HERE-- OF YOUR DEVELOPMENT ACTIVITY SHOULD BE IN THE RESEARCH AND CULTIVATION SIDE, NOT IN THE ASKING SIDE.  
>> OKAY, NUMBER FIVE, ALWAYS HAVE A DEVELOPMENT PLAN.

ALWAYS HAVE A DEVELOPMENT GOAL.

AND REALLY FOR THE REST OF THIS WEBINAR THAT'S WHAT WE'RE GOING FOCUS ON IS THE PLANNING.  
SO MORE ON THAT SOON.

>> BEFORE I MOVE ON, ARE THERE ANY QUESTIONS SO FAR?

>> WE DON'T HAVE ANY YET, WE HAVE A LOT OF COMMENTS FROM FOLKS WHO SAY THAT THEIR OBJECT  
-- THEY'RE NOT PEOPLE PEOPLE.

THEY'RE MORE COMFORTABLE AROUND OBJECTS THAN PEOPLE.

DO YOU HAVE SUGGESTIONS FOR FOLKS LIKE THAT?

I WOULD THINK TRANSLATING YOUR PASSION FOR OBJECTS IS ONE GREAT WAY TO BRIDGE THAT GAP.

>> YES, AND I THINK LATER WHEN WE GET TO STAFFING WE'LL TALK A LITTLE BIT MORE ABOUT WHAT  
IF YOU DON'T HAVE THE TYPE OF SKILLS THAT YOU -- THAT SOMEONE WHO'S ACTUALLY DOING THE  
ASKING SHOULD HAVE BECAUSE I DON'T THINK THAT EVERYONE ON STAFF SHOULD BE RESPONSIBLE FOR  
DEVELOPMENT.

I THINK THAT IT REQUIRES A SET OF SKILLS THAT MIGHT BE DIFFERENT FROM PEOPLE -- FROM OTHER  
PEOPLE IN YOUR ORGANIZATION.

SO FINDING -- EITHER FINDING THE PERSON TO HELP YOU WITH THAT OR TO HELP TO TRAIN YOU TO  
DO THAT IS KEY.

BUT -- WELL, WE'LL GET INTO THAT MORE LATER.

I HOPE THEY THE QUESTION WILL BE ANSWERED BY THEN.

>> AND FEEL FREE TO KEEP ASKING.

>> OKAY, WELL, WITH THAT, LET'S GO ON TO THE NEXT ONE HERE.

>> OKAY, WE'RE JUST GOING TO GO THROUGH THE CHECKLIST OF THINGS THAT YOU NEED TO GET  
STARTED WITH DEVELOPMENT EFFORTS AND I REALIZE THAT ALL OF YOU ARE VERY VERY DIFFERENT  
SIZES AND TYPES OF INSTITUTIONS, SO NOT ALL OF THESE WILL BE APPLICABLE TO EVERYONE.  
BUT I HOPE EVEN IN TALKING ABOUT THEM YOU WILL GET A BETTER OVERALL PICTURE OF WHAT THE  
DEVELOPMENT PROGRAM SHOULD BE, WHAT IT COULD BE, OR MAYBE WHAT IT ALREADY IS THAT YOUR  
INSTITUTION, IF YOU WORK FOR A LARGE INSTITUTION THAT HAS A DEVELOPMENT PROGRAM, EVEN IF  
YOU'RE NOT WORKING DIRECTLY WITH DEVELOPMENT IT'S GOOD TO KNOW HOW IT WORKS AT ALL LEVELS,  
I THINK.

OKAY, SO I'M GOING TO GO OVER THREE ACTIVITIES THAT WILL HELP YOU GET STARTED.

THE FIRST ONE IS TO SECURE OR IN SOME CASES LOCATE YOUR ORGANIZATION'S TAX-EXEMPT STATUS.

THE SECOND ONE IS TO CREATE OR EVALUATE GOALS FOR YOUR INSTITUTION OR YOUR DEPARTMENT.

AND THE THIRD ONE IS TO THINK ABOUT STAFFING AND HOPEFULLY WE'LL -- WE CAN TALK A LITTLE  
BIT MORE ABOUT THE QUESTION THAT WAS JUST ASKED IN THAT SECTION.

>> OKAY, SO FIRST THE VERY FIRST THING THAT YOU HAVE TO HAVE TO RAISE MONEY IS TAX-EXEMPT  
STATUS.

EVEN THOUGH YOU CAN PROBABLY FIND SOME GRANT FUNDING WITHOUT IT, YOU ARE REALLY GOING TO  
BE MISSING OUT ON A LOT OF OPPORTUNITYS IF YOU DON'T.

V TAX-EXEMPT STATUS.

SO I'M GOING ADDRESS THREE WAYS TO FIND YOUR TAX-EXEMPT STATUS.

FIRST, IF YOU'RE WITH A UNIVERSITY OR A LARGE ORGANIZATION, YOU LIKELY ALREADY HAVE TAX-  
EXEMPT STATUS AND YOU CAN APPLY FOR GRANTS USING THE STATUS OF YOUR INSTITUTION.

JUST BE CAREFUL IF YOU ALREADY HAVE A DEVELOPMENT DEPARTMENT AT YOUR INSTITUTION THAT IS  
FUND-RAISING.

IF YOU WANT TO DO SEPARATE OR ADDITIONAL FUND-RAISING FOR YOUR PARTICULAR DEPARTMENT,  
PLEASE BE SURE TO TALK WITH YOUR DEVELOPMENT DEPARTMENT OR YOUR ADMINISTRATION FIRST AND  
I'VE SEEN THIS BEFORE IN LARGER INSTITUTIONS THAT TWO PEOPLE FROM THE SAME INSTITUTION GO  
TO THE SAME DONOR FOR MONEY AND REALLY THIS LOOKS REALLY BAD AND IT CAN REALLY TURN OFF A  
DONOR IF TWO DIFFERENT PEOPLE COME TO THE SAME PERSON.

SO YOU DEFINITELY SHOULD COORDINATE EFFORTS.

>> NUMBER TWO, SOME LIBRARY SYSTEMS USE THEIR FRIENDS' GROUP TAX-EXEMPT STATUS TO APPLY  
FOR GRANTS.

THAT'S FINE, BUT, AGAIN, I WOULD MAKE CERTAIN THAT YOUR FRIENDS BOARD IS NOT ONLY AWARE  
THAT YOU'RE USING THEIR TAX-EXEMPT STATUS FOR FUND-RAISING BUT ALSO FULLY SUPPORTS THE

EFFORT.

NOT ONLY SHOULD YOUR FRIENDS PRESIDENT KNOW THAT YOU ARE USING THE TAX-EXEMPT STATUS WHEN YOU WRITE GRANTS, BUT I WOULD EVEN ASK THE FRIENDS GROUP TO INCLUDE IT IN THEIR MISSION STATEMENT.

IF YOU ARE GOING TO LAUNCH A FUND-RAISING EFFORT IN YOUR ORGANIZATION AND THE FRIENDS GROUP IS THE NONPROFIT TAX-EXEMPT GROUP IN YOUR -- THAT'S ASSOCIATED WITH YOUR ORGANIZATION, MAKE SURE THAT THEY ARE IN ON THE CONVERSATION.

AND THAT THEY UNDERSTAND WHAT IS -- WHAT IS BEING ASKED OF THEM.

AND PROBABLY, I DON'T KNOW, FOR MANY OF YOU MAYBE THE MOST COMMON PROBLEM IS THAT YOU DON'T HAVE A TAX-EXEMPT ORGANIZATION AT ALL BECAUSE YOU'RE PART OF A MUNICIPALITY.

FOR PUBLIC ENTITIES LIKE, FOR EXAMPLE, WHERE I'M WORKING NOW, THE BIRMINGHAM PUBLIC LIBRARY, WE ARE A MUNICIPAL LIBRARY, WE'RE PART OF THE CITY OF BIRMINGHAM, AND WE HAVE HAD TO CREATE A SEPARATE SUPPORTING ORGANIZATION TO RAISE FUNDS FOR US.

AND I BELIEVE IT WAS 1996 OR '97 WE CREATED THE BIRMINGHAM PUBLIC LIBRARY FOUNDATION.

AND ITS SOLE REASON FOR BEING IS FOR PHILANTHROPIC PURPOSES.

AND BASICALLY WHAT WE HAD TO DO WAS CREATE A BOARD OF COMMUNITY MEMBERS AND THEY HAD TO APPLY FOR TAX-EXEMPT STATUS.

WHEN WE DO FUND-RAISING HERE, WE'RE VERY CLEAR THAT OUR -- IT'S OUR FOUNDATION THAT IS ASKING FOR MONEY, BUT WE'RE ALSO VERY CLEAR THAT THAT MONEY GOES TO THE LIBRARY, IT GOES TO SUPPORT LIBRARY EFFORTS.

SO I THINK OPEN COMMUNICATION BOTH ON YOUR WEB SITE AND IN YOUR LETTERS AND IN YOUR GRANT PROPOSALS IS EXTREMELY IMPORTANT TO LETTING PEOPLE KNOW WHAT THE PURPOSE OF YOUR FOUNDATION IS AND IT'S VERY COMMON FOR LARGE PUBLIC LIBRARY SYSTEMS AND PUBLIC MUSEUMS TO HAVE A NONPROFIT FUND-RAISING ARM AND SO IT'S VERY COMMON AND IF YOU DO A QUICK SEARCH OF, FOR EXAMPLE, OF LIBRARIES IN SOME OF

THE LARGER CITIES YOU WILL FIND THAT MOST OF THEM HAVE SOME SORT OF FOUNDATION.

>> SO I'M NOT GOING TO GO INTO TOO MANY DETAILS ABOUT HOW TO GET YOUR TAX-EXEMPT STATUS HERE BECAUSE I THINK PROBABLY THE MAJORITY OF YOU ALREADY WORK FOR AN INSTITUTION THAT HAS SOME KIND OF TAX-EXEMPT STATUS.

BUT ON THE RESOURCES LIST THAT YOU'LL GET AT THE END OF THIS WEBINAR I'VE ADDED THE I.R.S. WEB PAGE THAT LISTS ALL OF THE THINGS WE NEED DO TO GET YOUR TAX-EXEMPT STATUS.

AND IT IS THE I.R.S., YOU DO -- THERE IS SOME WORK INVOLVED BUT IT'S NOT -- IT'S SOMETHING THAT CAN BE ACCOMPLISHED.

AND BASICALLY YOU WILL HAVE TO FORM A BOARD, YOU'LL HAVE TO HAVE A MISSION STATEMENT AND YOU'LL HAVE TO MEET REGULARLY.

BEFORE I MOVE ON, ARE THERE ANY QUESTIONS ABOUT THAT IN PARTICULAR?

>>

>> WE DON'T HAVE ANY SPECIFIC QUESTIONS ABOUT THAT JUST YET.

>>

>> OKAY.

SO MOVING ON.

ONCE YOU'VE SECURED OR LOCATED YOUR ORGANIZATION'S TAX-EXEMPT STATUS-- WHICH, BY THE WAY, IS IN THE FORM OF A LETTER, A 501(C)(3) IS THE I.R.S. CODING FOR TAX EXEMPTION, SO YOU'LL SEE A LOT OF FOUNDATIONS ASK FOR YOUR 501(C)(3) LETTER.

ONCE YOU'VE FOUND THAT AND LOCATED IT YOU CAN BEGIN TO THINK ABOUT DEVELOPMENT.

AND I DO SEE THERE'S A QUESTION ABOUT EUROPE.

THIS IS VERY -- THIS IS COMING FROM THE AMERICAN SIDE, THE TAX EXEMPTION SO I KNOW IT WORKS DIFFERENTLY IN EUROPE.

YOU CAN BEGIN TO THINK ABOUT DEVELOPMENT, AND THE FIRST RULE OF THUMB IS TO CREATE YOUR DEVELOPMENT PLAN ACCORDING TO YOUR INSTITUTIONAL STRATEGIC AND/OR DEPARTMENTAL PLAN.

SO THE OBVIOUS FIRST QUESTION HERE IS: DOES YOUR ORGANIZATION HAVE A STRATEGIC PLAN? OR A DEPARTMENTAL PLAN?

>> I WANT TO TALK ABOUT SEVERAL TYPES OF PLANS, FIRST STRATEGIC PLANS AND THEN DEPARTMENTAL PLANS BECAUSE PLANNING REALLY STARTS AT THE TOP.



IT STARTS WITH YOUR INSTITUTION AND A PLAN -- A STRATEGIC PLAN WILL GIVE YOU A PRIORITY SO THAT YOU WILL KNOW WHAT YOU'RE FUND-RAISING FOR AND YOU WILL PUT YOUR ENERGIES INTO THE THINGS THAT YOU DECIDE ARE THE HIGHEST PRIORITIES FOR YOUR ORGANIZATION OR FOR YOUR INSTITUTION.

AND I'VE INCLUDED ALSO-- I'LL TALK ABOUT IN A MINUTE-- DEPARTMENTAL PLAN.

FOR THOSE OF YOU WHO ARE WORKING IN A LARGE INSTITUTION AND HAVE TO THINK A LITTLE BIT SMALLER.

BUT LET ME GIVE YOU A QUICK HYPOTHETICAL SITUATION THAT I'M SURE MANY OF YOU PROBABLY HAVE EXPERIENCED SOMETHING LIKE THIS BEFORE.

LET'S SAY YOU'RE THE SOLE FUND-RAISER AT YOUR INSTITUTION AND YOU PROBABLY HAVE THREE OTHER HATS TO WEAR AS WELL, IF YOU'RE ANYTHING LIKE MOST SMALL CULTURAL ORGANIZATIONS. AND LET'S SAY YOUR STAFF -- YOUR SMALL STAFF OF FOUR IS SITTING IN YOUR OFFICE AND YOUR ARCHIVIST SAYS "WE NEED TO RAISE MONEY FOR AN EXHIBITION OF OUR DEPRESSION-ERA PRINTS FOR THE FALL.

IT'S IMPORTANT WE LET PEOPLE KNOW ABOUT OUR COLLECTION AND WE PUT IT ON DISPLAY ONCE IN A WHILE."

BEFORE YOU CAN EVEN ANSWER, YOUR CONSERVATOR STOPS AND SAYS "BUT THE PHOTO COLLECTION THAT MRS. SMITH JUST DONATED TO US LAST MONTH IS SITTING IN THE STORAGE ROOM IN BOXES THAT ARE NOT ACID FREE AND ARE COMPLETELY UNORGANIZED.

IF WE DON'T RAISE MONEY FOR SOMEONE TO PROCESS THAT COLLECTION AND GET IT OUT OF THE CLOSET SOON, WE'LL LOSE IT."

SO ALREADY THERE'S TENSION IN THE ROOM WHEN THE DIRECTOR OF YOUR LITTLE MUSEUM SAYS "WE NEED TO BUY A LARGE BOOK SCANNER.

WE HAVE THESE LARGE BOOKS THAT ARE JUST SITTING IN OUR CLOSET AND WE NEED TO SCAN THEM AND PUT THEM ON THE INTERNET.

SO LET'S FUND RAISE FOR THAT FIRST."

SO WHAT DO YOU DO?

WHAT DO YOU, THE ONE PERSON WHO'S IN CHARGE OF, LET'S SAY, THE GRANT WRITING IN YOUR ORGANIZATION, DECIDE TO WORK ON FIRST?

WELL, THAT'S WHERE THE PLANNING COMES IN.

SO LET ME TALK ABOUT, AS I SAID, I'M GOING TO TALK ABOUT THREE TYPES OF PLANS.

THE FIRST ONE IS THE ORGANIZATIONAL STRATEGIC PLAN.

A STRATEGIC PLAN WILL HELP YOU AND YOUR BOARD SET YOUR ORGANIZATIONAL PRIORITIES SO THAT YOU KNOW WHAT YOUR BROAD ACTIVITIES WILL BE FOCUSED AROUND.

MOST STRATEGIC PLANS BEGIN WITH AN INSTITUTIONAL MISSION AND SET OUT GOALS AND OBJECTIVES FOR THE UPCOMING THREE TO FIVE YEARS.

AN EXAMPLE OF A STRATEGIC PLAN GOAL MIGHT BE TO, LET'S SAY, BRING OUR CONSERVATION PROGRAM UP TO THE STANDARDS OF THE FIELD.

AN OBJECTIVE TO REACH THAT GOAL MIGHT BE TO CREATE AND MAINTAIN AN UP-TO-DATE CONSERVATION PLAN.

YOU MAY EVEN TAKE THAT ONE STEP FURTHER AND ADD TACTICS OR ACTIONS.

FOR EXAMPLE, TO RESPOND TO THE OBJECTIVES AND GOALS YOU MIGHT SAY YOU'RE GOING TO HIRE A CONSERVATION CONSULTANT TO ASSESS OUR COLLECTION AND HELP US WRITE THE PLAN.

SO STRATEGIC PLANS ARE ALMOST ALWAYS DEVELOPED IN COOPERATION WITH A CONSULTANT AND WITH A COMMITTEE OF BOARD MEMBERS, STAFF MEMBERS, AND COMMUNITY MEMBERS.

THE.

>> THE NEXT KIND OF PLAN IS A DEPARTMENTAL PLAN AND I WANTED TO -- LIKE I SAID, I WANTED TO INCLUDE SOMETHING THAT IS SIMILAR TO A STRATEGIC PLAN BUT MIGHT BE BETTER SUITED FOR LARGE INSTITUTIONS THAT HAVE LARGE DEPARTMENTS WITHIN THEM, LIKE UNIVERSITIES OR LARGE MUSEUMS OR LIBRARIES.

FOR EXAMPLE, A LIBRARY THAT HAS 19 BRANCHES MIGHT ALREADY HAVE AN OVERALL ORGANIZATIONAL STRATEGIC PLAN, BUT ITS ARCHIVES-- A DEPARTMENT WITHIN THE INSTITUTION-- SHOULD HAVE ITS OWN PLAN AS WELL.

A PLAN FOR THE ARCHIVES MIGHT INCLUDE THE NUMBER AND TYPES OF EXHIBITIONS TO DEVELOP OVER

THE UPCOMING THREE YEARS OR THE NUMBER AND TYPES OF EVENTS LIKE LECTURES AND SYMPOSIA TO HOLD OVER THE NEXT THREE YEARS.  
AND THE GOALS IN TERMS OF PROCESSING AND DIGITIZING COLLECTIONS OVER THE NEXT THREE YEARS.  
IF YOU'RE A SMALL INSTITUTION, OBVIOUSLY YOU WOULDN'T NEED TO GET TO THIS LEVEL OF PLANNING.

AN INSTITUTIONAL STRATEGIC PLAN WOULD INCLUDE THESE THINGS.  
BUT FOR LARGER ORGANIZATIONS THIS IS SOMETHING TO THINK ABOUT AND WILL HELP YOU KNOW WHAT TO PRIORITIZE AND WHAT TO THINK ABOUT IN TERMS OF FUND-RAISING.

>> FOR THOSE OF YOU WHO WORK FOR INSTITUTIONS THAT ARE CARING FOR COLLECTIONS-- WHICH I ASSUME IS MOST OF YOU OR ALL OF YOU-- I HIGHLY RECOMMEND HAVING A THIRD TYPE OF PLAN, WHICH IS A CONSERVATION PLAN.

AND TO DO THAT YOU SHOULD HAVE A CONSERVATION ASSESSMENT COMPLETED.

I'VE INCLUDED IN YOUR RESOURCES LIST A GRANT OPPORTUNITY FOR HERITAGE PRESERVATION CALLED THE CONSERVATION ASSESSMENT PROGRAM.

THIS IS AN EASY GRANT TO WRITE WHICH IS GREAT IF YOU'VE NEVER WRITTEN ONE BEFORE.  
AND THE MONEY THAT YOU GET FROM IT PAYS FOR A CONSERVATION EXPERT TO LOOK AT YOUR COLLECTION AND CREATE PRIORITIES FOR CONSERVATION ACTIVITIES.

EVEN IF YOU, THE STAFF, ALREADY KNOW WHAT YOUR PRIORITIES ARE, MANY GRANTING AGENCIES, ESPECIALLY FEDERAL ONES, WILL WANT TO SEE THAT YOU HAVE COMPLETED AN INDEPENDENT CONSERVATION ASSESSMENT BEFORE THEY WILL GIVE YOU THE MONEY FOR CONSERVATION PROJECTS.

SO I SEE THAT JENNY HAS POSTED THE LINK HERE IN THE CHAT BOX WHICH IS GREAT.

SO YOU DON'T NECESSARILY HAVE TO GET THIS GRANT TO DO A CONSERVATION ASSESSMENT, BUT IT'S REALLY NICE TO HAVE AND BEFORE YOU APPLY FOR CONSERVATION MONEY MOST FEDERAL AGENCIES ARE GOING TO HAVE-TO-ASK YOU IF YOU HAD A CONSERVATION ASSESSMENT.

I THINK THE PLACES WHERE I'VE WORKED THE FIRST THING -- THE FIRST QUESTION I GET IS, WELL, YOU KNOW, WE ALREADY KNOW WHAT OUR PROBLEMS ARE.

WE WORKED HERE FOR 25 YEARS, WE'VE -- OF COURSE WE KNOW WHAT WE NEED.

YES, THERE IS NO DOUBT THAT YOU PROBABLY ALREADY KNOW WHAT YOU NEED.

BUT A FEDERAL AGENCY OR A LOCAL FOUNDATION WILL LIKELY WANT TO SEE THAT A UNBIASED OUTSIDE CONSULTANT HAS COME INTO YOUR INSTITUTION AND HAS KIND OF TAKEN A STEP BACK AND HAS PUT TOGETHER WHAT THEY FEEL THE PRIORITIES FOR CONSERVATION CARE IN YOUR INSTITUTION SO THOSE ARE THREE TYPES OF PLANS THAT YOU SHOULD SEE FIRST OF ALL IF YOU HAVE ALREADY YOU SHOULD THINK ABOUT DOING BEFORE YOU START ANY FUND-RAISING AT ALL FOR COLLECTIONS CARE.

ANY QUESTIONS ABOUT ANY OF THESE THREE?

>> WE DID ACTUALLY HAVE SOME QUESTIONS ABOUT THE TAX-EXEMPT STATUS IF YOU DON'T MIND.

SARA IN ILLINOIS IS ASKING WITH THE I.R.S. TAX-EXEMPT STATUS WOULD YOU ALSO PURSUE STATE TAX-EXEMPT STATUS?

>> OH, THAT'S A GOOD QUESTION.

YOU CAN PURSUE STATE TAX-EXEMPT STATUS AND I GUESS I'M TRYING TO THINK OF AN EXAMPLE OF ANY TIME I'VE EVER REALLY NEEDED IT AND I CAN THINK OF ONE TIME WHEN I USED THE STATE TAX-EXEMPT STATUS FOR I BELIEVE THAT WAS STATE GRANT BUT I DON'T THINK IT'S NECESSARY I'VE NEVER HAD ANY OTHER TIME WHERE I'VE REALLY NEEDED IT.

I THINK YOU SHOULD SET YOUR SITES ON THE FEDERAL TAX-EXEMPT STATUS AND I COULD -- I MEAN, THERE COULD BE ANOTHER REASON FOR IT BUT I HAVE NEVER NEEDED IN THE ALL OF THE YEARS I'VE BEEN DOING IT.

>> AND THEN WE HAD A QUESTION FROM KEN IN TENNESSEE.

HE'S CURIOUS WHAT IF YOU HAVE A SALE IN USE STATUS?

>> I DON'T EVEN KNOW WHAT THAT IS!

I'M SORRY!

>> I WAS WONDERING THE SAME THING.

>> I'M AFRAID I DON'T KNOW WHAT THAT IS SO I PROBABLY HAVE NEVER USED IT.

>> WELL, KEN, FEEL FREE TO PUT IN MORE INFORMATION ABOUT THAT AND WE'LL SEE IF WE CAN GET YOU AN ANSWER.

WE HAD A QUESTION ABOUT -- A BROAD OVERVIEW, WOULD THIS WILL INFORMATION AND THIS STRATEGY

FOR FUND-RAISING ALSO WORK FOR ARCHAEOLOGICAL DIGS?

>> IT REALLY DEPENDS.

FIRST OF ALL, THE ARCHAEOLOGICAL DIG, IF IT IS -- IT SHOULD BE SPONSORED BY A NONPROFIT ORGANIZATION.

YOU WILL HAVE DIFFICULTY GETTING GRANT FUNDING FOR SOMETHING THAT IS NOT SPONSORED BY A NONPROFIT ORGANIZATION, THAT HAS A 501(C)(3) STATUS.

SO IF YOU HAVE A SPONSOR -- AN ORGANIZATION THAT IS SPONSORING YOU, THEN I COULD SEE SOME POSSIBILITIES FOR GETTING GRANT FUNDING OR OTHER TYPES OF FUNDING FOR -- TO SUPPORT AN ARCHAEOLOGICAL DIG, YES.

SY HOPE THAT ANSWERS THE QUESTION.

>> KELLY WEIGHED IN, SHE SAYS SHE THINKS HE'S TALKING ABOUT A STATUS EXEMPT ORGANIZATION FROM PAYING SALES TAX ON PURCHASES.

THAT DOES GO HAND IN HAND WITH TAX-EXEMPT, RIGHT?

>> YES, ALTHOUGH -- YOU KNOW, YOU ALSO HAVE TO THINK ABOUT YOUR DONORS AND IF THEY CAN GET TAX -- IF WHEN THEY GIVE A DONATION THEY CAN GET A TAX BREAK ON THEIR DONATION AND I'M NOT SURE IF IT DOES THAT.

>> OKAY, THEN WE HAVE THE SAME QUESTION COMING IN FROM A LOT OF FOLKS.

THEY'RE CURIOUS.

THEY HAVE GONE THROUGH CAP BUT HOW RECESS SHOULD THEIR ASSESSMENT HAVE BEEN TO ALIE FOR GRANTS?

>> THAT'S A REALLY GOOD QUESTION IT DEPENDS ON A COUPLE OF THINGS.

JUST AS A GENERAL RULE I PROBABLY WOULDN'T GO MORE THAN TEN YEARS.

TY THINK MORE THAN TEN YEARS WOULD BE TOO LONG.

HOWEVER, I'VE WORKED FOR ORGANIZATIONS THAT HAVE HAD A CAP ASSESSMENT DONE AND THESE THINGS THAT THEY HAD TO DO TOOK SO MUCH TIME TO DO THEM AND ALSO EACH OF THE THINGS REQUIRED SOME FUND-RAISING AND THAT TOOK TIME THAT THEY WERE STILL WORKING ON THEIR PRIORITIES, EVEN AFTER, OH I WOULD SAY SEVEN OR EIGHT YEARS.

THEY WERE STILL WORKING ON THEIR PRIORITIES AND THE PRIORITIES WEREN'T -- WERE STILL VALID.

THINGS CHANGE AND I THINK THE DECADE IS PROBABLY ABOUT THE CUTOFF.

I WOULD GO -- I WOULD PROBABLY HAVE ANOTHER ONE COMPLETED AFTER THAT.

>>

>> AND WE DO HAVE MELANIE ZUCKER ON BOARD, SHE'S OUR CAP ASSISTANT AND SHE'S WRITING A LOT OF GREAT ANSWERS FOR YOU GUYS SO YOU GUYS CAN DO A RECAP AFTER SEVEN YEARS.

THAT'S ALL THE QUESTIONS WE HAVE FOR RIGHT NOW, KELSEY.

>> ALL RIGHT, WELL THEN LET'S MOVE ON.

BEFORE WE GET INTO SETTING GOALS FOR DEVELOPMENT, I JUST WANT YOU ALL TO REMEMBER THAT ALL OF THIS TAKES A LOT OF TIME.

OBVIOUSLY WHEN I SAY A DECADE IS ABOUT -- YOU KNOW, YOU COULD STILL PROBABLY USE AN ASSESSMENT THAT'S A DECADE OLD.

FUND-RAISING DOES TAKE TIME AND SOMETHING THAT YOU, YOUR STAFF, OR YOUR BOARD NEED TO BE AWARE SO THAT DEVELOPMENT IS A PROCESS.

IT TAKES YEARS.

SOMETIMES IT TAKES YEARS.

AND NO ONE AT YOUR INSTITUTION SHOULD EXPECT YOU TO START MAKING MONEY IMMEDIATELY.

SO JUST REMEMBER THAT.

SO LET'S SAY YOU'VE GONE THROUGH THE PROCESS OF SETTING YOUR STRATEGIC OR DEPARTMENTAL GOALS.

YOU KNOW WHAT YOU WANT TO DO, YOU HAVE YOUR PRIORITIES AND YOU HAVE YOUR TIMELINE.

LET'S LOOK AT AN EXAMPLE OF A THREE-YEAR DEPARTMENTAL PLAN FOR AN ARCHIVES FOR THE CALENDAR YEARS 2014 THROUGH 2016.

I THINK THREE YEARS -- IF YOU'RE GOING TO PUT TOGETHER A PLAN,ER THAT A STRATEGIC PLAN OR DEPARTMENTAL PLAN FIVE YEARS -- OR THREE YEARS IS A REALLY GOOD -- I THINK A REALLY GOOD TIME PERIOD.

IT'S NOT SO LONG THAT YOU FEEL LIKE YOU HAVE TO COMPLETELY REDO -- OR IT'S COMPLETELY OBSOLETE BY YEAR FOUR.  
AND IT KIND OF FORCES YOU TO SIT DOWN AND LOOK AT IT AGAIN BECAUSE THINGS CHANGE REALLY FAST.  
WITH THAT SAID, IF I'M GOING TO LET YOU ALL LOOK AT THE BIRMINGHAM PUBLIC LIBRARY'S STRATEGIC PLAN AND IT'S ACTUALLY LONGER THAN THREE YEARS.  
SO, YOU KNOW, IT REALLY IS UP TO YOUR ADMINISTRATION AND YOUR BOARD, BUT FLY TO FIVE YEARS IS A GOOD TIME PERIOD.  
OKAY, SO HERE ARE THE THREE GOALS YOU'VE DECIDED TO ACCOMPLISH IN THAT TIME.  
YOU WANT TO PROCESS A NEWLY ACQUIRED HISTORIC PHOTO COLLECTION, YOU WANT TO PLAN AN EXHIBITION OF DEPRESSION-ERA WORKS ON PAPER, AND YOU WANT TO PURCHASE A PLANETARY SCANNER OR A BOOK SCANNER.  
THESE ARE THE THINGS -- THESE ARE THE THREE TOP PRIORITIES THAT YOU HAVE DECIDED YOU WANT TO DO, LET'S SAY, ON YOUR ARCHIVES FOR THE NEXT THREE YEARS.  
HERE'S HOW YOUR DEVELOPMENT PLAN WILL RESPOND DIRECTLY TO YOUR DEPARTMENTAL PLAN.  
FIRST, YOU'LL NEED TO DETERMINE THE COSTS FOR EACH PROJECT.  
TAKE INTO CONSIDERATION DIRECT COSTS LIKE SUPPLIES, MATERIALS, EQUIPMENT, CONSULTANTS, BUT ALSO TAKE INTO CONSIDERATION INDIRECT COSTS.  
FOR EXAMPLE, HOW MUCH TIME IS THIS GOING TO TAKE YOUR STAFF TO DO?  
THINK OF ALL THE STAFF WHO ARE GOING TO WORK ON PROCESSING THE NEWLY ACQUIRED HISTORIC PHOTO COLLECTION.  
WHEN YOU THINK ABOUT THE AMOUNT OF TIME YOUR STAFF IS GOING TO SPEND, TRANSLATE THAT INTO DOLLARS AND IT'S NOT SOMETHING WE USUALLY LIKE TO DO OR WE USUALLY DO DO IN THE CULTURAL EFFECTOR BUT IT'S GOOD TO SEE HOW MUCH -- HOW MANY OF YOUR RESOURCES ARE GOING INTO A PROJECT.  
NOT ONLY DOES IT HELP YOU IN PLANNING AND ALSO DECIDING HOW MUCH TIME EACH PERSON IS GOING TO SPEND ON SOMETHING, IT ALSO WILL HELP YOU WHEN YOU ARE COMMUNICATING WITH DONORS.  
YOU WILL KNOW HOW MUCH MONEY IT REALLY IS TAKING FOR THIS PROJECT.  
HOW MUCH MONEY IS YOUR INSTITUTION CONTRIBUTING THROUGH SALARIES AND THROUGH TIME AND THROUGH MAYBE EQUIPMENT AND FACILITIES THAT YOU ALREADY HAVE DO YOU HAVE ANY INTERNAL RESOURCES THAT CAN BE PUT TOWARD THE PROJECT?  
WILL YOUR INSTITUTION BE CONTRIBUTING ANY OUTRIGHT NOUN THE PROJECT.  
THAT'S THE FIRST PART, DETERMINE COSTS FOR THE PROJECT.  
THE SECOND PART IN PUTTING TOGETHER DEVELOPMENT GOALS, DETERMINE THE ACTIVITIES AROUND EACH PROJECT ALONG WITH A SCHEDULE FOR COMPLETION.  
THIS IS IMPORTANT FOR SEVERAL DIFFERENT REASONS: THE FIRST ONE SEASON THAT GRANTS TAKE A WHILE.  
THEY REALLY DO.  
SOME GRANTS MIGHT TAKE UP TO NINE MONTHS BETWEEN THE TIME YOU APPLY AND THE TIME YOU HEAR BACK.  
AND EVEN IF YOUR APPLICATION -- THE SECOND THING IS EVEN IF YOUR APPLICATION DOESN'T TAKE NINE MONTHS TO REVIEW, WHAT IF YOU GET TURNED DOWN?  
YOU WILL NEED TIME TO GO BACK TO ANOTHER ORGANIZATION OR INDIVIDUAL FOR FUNDING.  
SO WHEN YOU'RE PUTTING TOGETHER YOUR DEVELOPMENT GOALS, YOU HAVE TO PLAN BACKWARDS FAR ENOUGH THAT YOU HAVE TIME TO FUND RAISE YOU HAVE TIME TO APPLY FOR A GRANT, ET CETERA, BEFORE YOU WANT TO COMPLETE THE ACTUAL PROJECT.  
NUMBER THREE, BEGIN PLANNING FOR A VARIETY OF DEVELOPMENT STRATEGIES FOR FUNDING FOR EACH -- FOR EACH PROJECT.  
IT'S REALLY TEMPTING TO DO ONLY GRANTS, AND I'M GOING TO TALK ABOUT THAT IN A MINUTE.  
IT'S ALSO TEMPTING TO KEEP GOING BACK TO THE SAME PEOPLE OVER AND OVER AND OVER AGAIN, THE PEOPLE WHO ARE THE MOST LOYAL TO YOUR ORGANIZATION.  
BUT TO GET MORE MONEY AND TO MAKE YOUR INSTITUTION SUSTAINABLE YOU NEED TO LOOK AT A VARIETY OF WAYS TO FUND SOMETHING.  
THERE'S SOMETHING IN DEVELOPMENT CALLED "DONOR FATIGUE" AND WE TALKED ABOUT THAT -- A

FAMILY THAT THE ARCHIVES CONTINUES TO GO BACK TO OVER AND OVER AND OVER AGAIN AND THEY ALWAYS GIVE AND THEY ALWAYS GIVE.

WELL, THERE'S TWO PROBLEMS WITH THAT.

FIRST OF ALL, THEY MIGHT GET -- EVENTUALLY THEY MAY GET TIRED OF IT.

THEY MAY DECIDE THAT THEY HAVE OTHER PRIORITIES.

SECOND OF ALL, THEY -- SOMEONE MAY -- SOMEONE IN THE FAMILY, THE PERSON WHO HAS -- WHO MAKES MOST OF THE GIFTS HAS PASSED AWAY AND THEIR CHILDREN ARE TAKING OVER AND SO THEY MAY HAVE DIFFERENT PRIORITIES FOR FUNDING AS WELL.

A COUPLE OF YEARS AGO WITH THE RECESSION A LOT OF NONPROFIT ORGANIZATIONS FOR HAD A REALLY DIFFICULT TIME BECAUSE SOME OF THEIR BIGGEST DONORS THAT THEY REALLY RELIED ON CAME OUT OF THE RECESSION IN A VERY BAD WAY AND COULD NOT GIVE TO ORGANIZATIONS LIKE THEY HAD BEFORE.

AND SO A LOT OF ORGANIZATIONS DIDN'T -- THEY BASICALLY PUT ALL THEIR EGGS IN ONE BASKET AND WHEN THAT BASKET WAS THERE ANYMORE THEY REALLY DIDN'T HAVE ANYWHERE ELSE TO GO.

SO IT'S GOOD TO KIND OF INVEST IN A LOT OF DIFFERENT WAYS TO FIND MONEY AND WE'RE GOING TO GET TO THAT NEXT.

>> LIKE I SAID BEFORE, WE LOVE GRANTS.

(LAUGHS)

WE LOVE TO WRITE GRANTS.

AND I'M SURE MANY OF YOU KNOW THAT GRANTS ARE THE FIRST WAY MANY INSTITUTIONS THINK OF TO RAISE FUNDS.

ESPECIALLY WHEN YOU DON'T A DEVELOPMENT DEPARTMENT, YOU DON'T HAVE A DEVELOPMENT DIRECTOR.

SO WITH THAT I JUST WANT TO TAKE ANOTHER QUICK SURVEY OF YOU GUYS.

I WANT TO KNOW, DO YOU OR HAVE YOU WORKED FOR AN INSTITUTION THAT WRITES GRANTS?

AND THERE ARE THREE ANSWERS -- WELL, ACTUALLY FOR.

"IT'S THE ONLY TYPE OF FUND-RAISING WE DO," "IT'S PART OF A LARGER FUND-RAISING PROGRAM OR "NO, WE'VE NEVER WRITTEN A GRANT."

>> THIS IS REALLY GOOD.

I'M GLAD TO SEE THAT A LOT OF YOU -- IT'S PART OF A LARGER FUND-RAISING PROGRAM.

SO FAR THAT IS THE GREAT MANY.

>> OKAY, EXCELLENT.

ALL RIGHT, THANK YOU.

SO THIS MAY NOT APPLY TO EVERYBODY BUT LET ME JUST QUICKLY TALK ABOUT WHY GRANTS ARE GREAT.

THIS IS WHY I THINK A LOT OF US REALLY FOCUS EVEN IF IT'S NOT THE ONLY PART OF YOUR FUND-RAISING STRATEGY IT MAY BUT A REALLY, REALLY BIG PART OF IT.

AND I THINK THERE ARE MANY REASONS WHY INSTITUTIONS FOCUS FIRST AND MAYBE ALWAYS ON GRANT WRITING.

AND THERE ARE MANY REASONS WHY YOU SHOULD MOVE PAST GRANT WRITING, SO LET ME LAY OUT THE PROS AND CONS OF GRANT WRITING.

FIRST OF ALL, GRANTS ARE GREAT WHEN YOU GET THEM BECAUSE THEY USUALLY OFFER A BIG REWARD.

I KNOW HAVING BEEN A GRANT WRITER FOR MANY YEARS THE BEST FEELING IN THE WORLD IS TO TELL YOUR BOSS THAT YOU JUST GOT A HUGE GRANT, AND YOUR STAFF.

PEOPLE ARE SO HAPPY.

AND USUALLY IT COMES WITH A PRETTY BIG AMOUNT OF MONEY.

NUMBER TWO, GRANTS ARE GREAT WAYS TO LEVERAGE OTHER MONEY.

FOR EXAMPLE, IF YOU GET A BIG I.M.L.S. GRANT OR AN N.E.A.

GRANT AND YOU NEED TO MATCH THAT GRANT WITH OTHER MONEY IT'S SO MUCH EASIER WHEN YOU HAVE -- WHEN YOU'VE GOTTEN THIS GRANT TO SAY "HEY, WE'VE GOTTEN \$15,000 FROM I.M.L.S., CAN YOU MATCH IT?"

DONORS WILL BE MORE LIKELY TO GIVE YOU MONEY BECAUSE YOU'VE GOTTEN THIS BIG GRANT FROM I.M.L.S. OR N.E.A..

WHICH ACTUALLY KIND OF FITS IN WITH ANOTHER DEVELOPMENT TRUTH, AND THAT IS THAT PEOPLE LIKE TO GIVE TO ORGANIZATIONS THAT THEY FEEL ARE HAVING SOME KIND OF SUCCESS.

SO THAT'S SOMETHING TO REMEMBER.

WHEN YOU'RE ASKING PEOPLE FOR MONEY-- WHETHER IN WRITING OR IN PERSON-- YOU WANT TO TALK ABOUT YOUR STRENGTHS.

YOU WANT TO TALK ABOUT THE BIG GRANT THAT YOU JUST GOT FROM I.M.L.S. THESE ARE CONFIDENCE BUILDERS IN DONORS.

DONORS LIKE TO SEE THAT OTHER PEOPLE ARE GIVING YOU MONEY.

THAT YOU'RE WORTH SOMETHING, WORTHWHILE AND OTHER PEOPLE SO BIG GRANTS LEVERAGE NEW MONEY. ONCE YOU GET A GRANT FROM A FOUNDATION YOU'RE MUCH MORE LIKELY TO GET GRANTS WITH THAT FOUNDATION.

THIS IS ESPECIALLY TRUE WITH FAMILY FOUNDATIONS.

IF YOU ARE LIVING IN A CITY THAT HAS A FAMILY FOUNDATION AND YOU JUST GOT YOUR FIRST GRANT FROM THEM IT'S VERY LIKELY THEY'LL CONTINUE TO SUPPORT YOU OVER TIME, IF THEY LIKE WHAT YOU'RE DOING, IF YOU DID A NICE JOB WITH THE MONEY THEY'VE GIVEN YOU ALREADY, IF THEY LIKE WHAT YOU'VE DONE WITH THE PROJECT THEY'LL PROBABLY CONTINUE TO GIVE OVER TIME.

IT MIGHT NOT LAST FOREVER BUT IT WILL PROBABLY LAST FOR A WHILE.

IN FACT, SOMETHING LIKE THAT HAPPENED HERE AT THE LIBRARY RECENTLY.

A LARGE FAMILY FOUNDATION JUST GAVE US ACTUALLY THE FIRST GRANT WE'VE EVER GOTTEN FROM THEM AND IT -- WE'VE BEGUN A RELATIONSHIP.

WE'VE STARTED A RELATIONSHIP WITH THEM SO WE'LL LIKELY GET ONGOING SUPPORT.

AND FINALLY, PROBABLY THE WORST REASON WHY GRANTS ARE SO GREAT IS BECAUSE SOMEONE ON STAFF IS A GOOD WRITER AND WE WANT TO PUT HER TO WORK.

SO THAT'S -- I THINK THAT'S A LOT OF REASON WHY SOME INSTITUTIONS DECIDE TO GO WITH GRANTS.

OKAY, SO HERE IS WHERE IT GETS A LITTLE BIT SCARY, ESPECIALLY FOR THOSE PEOPLE THROUGHOUT WHO SAID "I'M AN OBJECTS PERSON."

I TOTALLY UNDERSTAND THAT.

BECAUSE -- WELL, WE'LL GET TO THAT WITH THE SECOND ONE, BUT THE FIRST ONE, GRANTS ARE GREAT, BUT THEY ONLY -- IF YOU'RE ONLY WRITING GRANTS, YOU'RE NOT GIVING PEOPLE ENOUGH AVENUES TO SUPPORT YOUR INSTITUTION.

YOU'RE ONLY GETTING MONEY FROM FOUNDATIONS AND FROM THE GOVERNMENT.

YOU'RE NOT REACHING OUT TO INDIVIDUALS.

OKAY.

NUMBER TWO, GRANT WRITING IS TEMPTING BECAUSE IT CAN YIELD BIG MONEY AND IT'S GENERALLY NON-INTERACTIVE.

YOU CAN SIT BEHIND YOUR DESK AND WRITE YOUR GRANT WITH SOME INPUT FROM YOUR STAFF, SEND IT OFF AND HOPEFULLY GET MONEY IN RETURN.

IT REQUIRES NO REAL CULTIVATION AND YOU CAN ASK FOR MONEY ON PAPER RATHER THAN SITTING IN FRONT OF SOMEONE WITH YOUR HANDOUT.

I'M NOT SAYING GRANT WRITING IS EASY BECAUSE IT'S NOT.

I'VE DONE IT FOR YEARS AND IT'S NOT AN EASY JOB.

BUT IN THE WORLD OF ASKING FOR MONEY, IT REALLY IS THE LEAST SCARY.

>> AND FINALLY, GRANTS TEND TO FUND PROJECTS NOT OPERATING EXPENSES.

THOUGH THIS ISN'T ALWAYS TRUE, IT'S MOST OFTEN THE CASE.

THE PROBLEM HERE IS THAT INSTITUTIONS OFTEN MAKE UP PROJECTS TO FIT GRANT OPPORTUNITIES. EVEN IF THOSE PROJECTS AREN'T TOP PRIORITY.

A LOT OF INSTITUTIONS WILL EVEN TRY TO CHANGE THEIR TOP PRIORITIES TO FIT A GRANT OPPORTUNITY AND REALLY IT SHOULD BE THE OTHER WAY AROUND.

YOU SHOULD COME UP WITH YOUR PRIORITIES, THEN PLAN, AND THEN LOOK FOR GRANT OPPORTUNITIES THAT FIT THAT PLAN.

SO GRANT OPPORTUNITIES ARE PROJECT-BASED AND A -- FOR A LOT OF US, FOR A LOT OF INSTITUTIONS WE NEED MORE THAN PROJECT MONEY.

WE NEED CAPACITY MONEY.

WE NEED MONEY FOR OPERATING.

AND YOU -- EVEN THOUGH THERE ARE SOME GRANTS THAT WILL PROVIDE THAT, YOU'RE GOING TO FIND THAT IN OTHER PLACES A LOT EASIER.

OR A LOT MORE FREQUENTLY, ANYWAY SO IF YOU'RE CURRENTLY WRITING GRANTS, IF YOUR INSTITUTION IS CURRENTLY WRITING GRANTS EXCELLENT.  
KEEP DOING IT.  
IT IS IMPORTANT AND IT BRINGS IN GOOD MONEY.  
AND IF YOU'RE NOT DEFINITELY START DOING IT.  
THERE'S A WEBINAR LATER IN THIS SERIES THAT'S FOCUSED ON WRITING GRANTS AND CERTAINLY GRANT WRITING DESERVES A WEBINAR ALL ITS OWN.  
SO I'M NOT GOING TO GET INTO GRANT WRITING IN DETAIL IN THIS SECTION BUT I WANT TO MAKE THE POINT THAT GRANT WRITING IS ONLY ONE ASPECT OF DEVELOPMENT AND YOU MUST CONSIDER YOUR DEVELOPMENT EFFORTS AS AN OVERALL STRATEGY.  
ONE PART OF WHICH IS GRANTS.  
ARE THERE ANY QUESTIONS ABOUT GRANTS BEFORE I MOVE ON?  
I MEAN, I DON'T WANT TO GET TOO DETAILED BECAUSE THERE IS ANOTHER WEBINAR THAT'S TOTALLY ABOUT GRANTS.  
BUT ANYTHING -- ANY BROAD QUESTIONS?  
>> YEAH, WE DO.  
BRITTANY HAS A QUESTION.  
HER INSTITUTION IS HEAVILY GRANT FUNDED AND SHE'S CURIOUS IF THERE ARE ANY TRICKS TO WEAN YOUR BOARD OFF OF GRANTS.  
>> OH!  
THAT'S A GREAT QUESTION!  
AND THAT IS PROBABLY -- THAT'S A PROBLEM FOR MANY, MANY INSTITUTIONS.  
I WOULD -- I THINK I WOULD SOMEHOW TRY TO MAKE THE POINT TO MY BOARD THAT GRANTS DON'T LAST FOREVER AND THAT ACTUALLY -- IT'S NOT THAT YOU'RE -- SOMEDAY YOU'LL NEVER HAVE GRANT FUNDING AGAIN.  
I MEAN, THERE'S ALWAYS GOING TO BE SOME PLACE TO FIND GRANTS, BUT GRANTS ARE NOT -- THEY'RE NOT DEFINITES.  
NOT THAT ANYTHING IN DEVELOPMENT REALLY IS A DEFINITE, BUT WHEN YOU HAVE AN INDIVIDUAL WHO HAS AGREED TO SUPPORT YOUR INSTITUTION YEAR AFTER YEAR AFTER YEAR AND THEY -- THEIR FAMILY WILL SUPPORT IT, THEIR FRIENDS WILL SUPPORT IT, YOU'RE GOING TO HAVE A MUCH MORE RELIABLE SOURCE OF INCOME THAN GRANTS.  
GRANTS ARE -- TEND TO BE VERY UNRELIABLE.  
YOU MIGHT GET IT; YOU MIGHT NOT.  
AND EVEN IF YOU'VE HAD A SUCCESSFUL TRACK RECORD WITH GRANTS YOU CAN ACTUALLY -- GRANTS REQUIRE A LOT OF TIME, A LOT OF STAFF TIME, OFTEN THEY REQUIRE A CONSULTANT OR GRANT WRITER TO COME IN AND WORK.  
AND I THINK THE BEST ARGUMENT IS THAT YOU WANT TO DIVERSIFY AND I'M GOING TO IMAGINE OR GUESS THAT A LOT OF BOARD MEMBERS OUT THERE TOTALLY UNDERSTAND THE WORD "DIVERSIFY" WHEN IT COMES TO THEIR INVESTMENTS, AND I THINK THAT YOU SHOULD MAKE THE SAME POINT WITH YOUR DEVELOPMENT PROGRAM.  
DEVELOPMENT IS AN INVESTMENT AND DIVERSIFYING IS THE SAFEST WAY TO CONTINUE FUNDING COMING INTO YOUR ORGANIZATION.  
>> GREAT, I HAVE A FEW OTHER GRANT QUESTIONS BUT I'M GOING TO HOLD ON TO THEM RIGHT NOW. THEY MIGHT BE BETTER -- A BETTER FIT FOR OUR GRANT WRITING COURSE.  
SO FEEL FREE TO MOVE ON.  
>> OKAY, GREAT.  
ALL RIGHT.  
OKAY, YES.  
WE WANT TO MOVE ON TO MORE THAN GRANTS.  
(LAUGHS)  
DO WE HAVE TO MOVE -- DO WE HAVE TO DO MORE THAN GRANTS?  
YES, IF YOU WANT TO RAISE MORE MONEY.  
AND, LIKE I SAID, GRANTS ARE -- FEEL SAFE BECAUSE YOU DON'T TO ACTUALLY TALK TO ANYBODY AND -- BUT THERE ARE OTHER WAYS WHERE, YOU KNOW, EVEN IF YOU'RE NOT A PEOPLE PERSON, EVEN

IF YOU DON'T LIKE TO GET OUT THERE AND SCHMOOZE WITH PEOPLE AND THEN SIT DOWN AND MAKE THE ASK, THERE ARE OTHER WAYS TO DIVERSIFY YOUR DEVELOPMENT PROGRAM THAT AREN'T -- I DON'T THINK THEY'RE THAT SCARY.

SO LET'S LOOK AT A FEW OF THEM.

>> LIKE I SAID, YOU WANT TO PROVIDE A NUMBER OF WAYS FOR PEOPLE TO GIVE TO YOUR INSTITUTION.

ONE OF THE -- I THINK THE BEST WAYS AND ACTUALLY THE FIRST WAYS THAT YOU SHOULD BRING NEW PEOPLE NEW DONORS INTO YOUR INSTITUTION IS THROUGH A MEMBERSHIP PROGRAM OR SOME SORT OF SUBSCRIPTION PROGRAM.

THAT IS PEOPLE GIVE YOU MONEY ANNUALLY AND THEY GET SOMETHING IN RETURN, SOME KIND OF BENEFIT.

AND THIS CAN BE DONE IN AN INSTITUTIONAL OR A DEPARTMENTAL LEVEL.

MANY ORGANIZATIONS, ESPECIALLY LIBRARIES, HAVE FRIENDS GROUPS, BUT THERE ARE A LOT OF DIFFERENT WAYS TO THINK ABOUT THEM.

IF YOU ARE A PUBLIC LIBRARY, PERHAPS YOU HAVE A GENERAL FRIENDS GROUP, BUT HAVE YOU THOUGHT ABOUT A FRIENDS OF THE SPECIAL COLLECTION?

OR RATHER THAN STARTING A WHOLE NEW GROUP, ADD ON AN AFFINITY GROUP FOR YOUR DEPARTMENT SO THAT PEOPLE CAN BECOME A FRIEND OF THE LIBRARY BUT FOR AN EXTRA \$10 THEY CAN ALSO SUPPORT THE ARCHIVES AND GET AN ARCHIVES-RELATED BENEFIT.

FOR EXAMPLE, MAYBE A BEHIND-THE-SCENES TOUR OR A POSTER DEPICTING SOMETHING FROM THE COLLECTION.

MEMBERSHIP PROGRAMS LIKE THIS ARE MEANT TO DO A COUPLE OF THINGS.

YOU'RE ASKING PEOPLE TO SUPPORT YOU AT A FAIRLY LOW LEVEL.

USUALLY MEMBERSHIP PROGRAMS ARE SOMEWHERE BETWEEN \$10 A YEAR AND \$500 A YEAR."

BUT THEY'RE MEANT TO BRING IN A LARGE GROUP OF PEOPLE.

AND SO EVEN THOUGH YOU AREN'T -- THIS ISN'T BIG MONEY WE'RE TALKING ABOUT, YOU'RE ACTUALLY BUILDING A LOYAL GROUP OF SUPPORTERS.

AND OVERTIME YOU WILL CONTINUE TO PROVIDE BENEFITS AND COMMUNICATION AND A FEELING OF RELATIONSHIP WITH THEM AND IDEALLY THEY WILL CONTINUE TO GIVE.

IN OTHER WORDS, A MEMBERSHIP PROGRAM GIVES YOU A PLACE TO START AND A GROUP OF PEOPLE TO KIND OF PULL FROM.

DEVELOPMENT PEOPLE LOVE TO TALK ABOUT THE PIPELINE.

AND THE -- THE DEVELOPMENT PIPELINE AND I GUESS IT'S KIND OF -- IT SOUNDS A LITTLE COLD BUT IF YOU THINK ABOUT IT, YOU HAVE THIS LARGE GROUP OF MEMBERS ALL GIVING AT A SMALL AMOUNT BUT THEY'RE OIL AND THEY'RE YOUR PEOPLE.

THEY'RE THE ONES WHO REALLY SUPPORT YOU.

THEY HAVE INTERESTS, THEY HAVE THE MEANS OR CAPACITY AND THEY HAVE THE INCLINATION TO GIVE.

AND OUT OF THOSE PEOPLE YOU'RE GOING TO HAVE A FEW WHO WILL GIVE MORE OVER TIME AND THAT, OF COURSE, MEANS THAT YOU HAVE TO ASK THEM TO GIVE.

AND THEN THEY CONTINUE TO GIVE MORE AND MORE AND MORE.

OF COURSE THIS IS ALL IN AN IDEAL WORLD BUT IT DOES WORK THIS WAY.

WE'LL TALK MORE ABOUT THE LOGISTICS OF STARTING AND MAINTAINING A MEMBERSHIP PROGRAM IN WEBINAR NUMBER THREE WHICH I'M ALSO TEACHING.

IT'S THE DONOR AND MEMBER CULTIVATION AND RELATIONS WEBINAR.

WE'LL TALK REALLY SPECIFICALLY ABOUT HOW TO GET YOUR MEMBERS ENGAGED, HOW TO GET THEM GIVING MORE OVER TIME AND GETTING MORE OVER TIME OUT OF YOUR ORGANIZATION TO MAKE A REALLY TRULY RECIPROCAL RELATIONSHIP WITH THEM.

LIKE I SAID, THEY'RE YOUR PEOPLE, SO THINK OF IT LIKE THAT THE SECOND THING-- AND THIS IS KIND OF ALONG THE SAME LINES AS INDIVIDUAL GIVING.

AND MEMBERSHIP A TYPE OF INDIVIDUAL GIVING.

BUT YOU HOPE THAT YOUR MEMBERS WILL EVENTUALLY GIVE WITHOUT RECEIVING A BENEFIT IN RETURN. THEY'LL GIVE TO A PROJECT THAT THEY REALLY LIKE.

THEY'LL GIVE MORE OVER TIME IF YOU ASK THEM.



BUT REALLY INDIVIDUAL GIVING IS ONE OF THE MOST OVERLOOKED PARTS OF A DEVELOPMENT PLAN BECAUSE AS I SAID BEFORE IT'S THE SCARIEST, REALLY.  
AND HONESTLY, IT'S THE MOST DIFFICULT TO BREAK INTO, OR IT SEEMS THAT WAY.  
HOW DO YOU GET TO THE POINT ARE WHERE YOU'RE COMFORTABLE ASKING AN INDIVIDUAL FOR MONEY?  
AGAIN, WE'LL TALK MORE ABOUT HOW TOS IN WEBINAR THREE, BUT I WILL SAY THAT MOST INSTITUTIONS FIND THE MAJORITY OF THEIR GIVING COMES FROM INDIVIDUALS.  
SO IF YOU'RE GOING TO PUT A LOT OF ENERGY AND TRAINING AND TIME INTO PART OF YOUR FUND-RAISING STRATEGY REALLY THINK ABOUT THIS AREA.  
I THINK A LOT OF INSTITUTIONS DON'T THINK ABOUT IT.  
NEXT ONE SO FOUNDATION AND CORPORATE GRANTS AND WE'VE KIND OF TOUCHED ON THIS BUT THE MAIN THING YOU WANT TO REMEMBER HERE IS TO APPLY FOR FOUNDATION AND CORPORATE -- FOUNDATION GRANTS TO FIND MONEY FOR YOUR PROJECTS THAT YOU HAVE ALREADY DECIDED TO DO.  
NEVER CREATE A PROJECT BECAUSE YOU SEE A GRANT OPPORTUNITY THAT YOU LIKE, EVEN IF IT DOES FIT YOUR MISSION STATEMENT.  
AND I KEEP REITERATING THIS BECAUSE I'VE SEEN IT -- I'VE SEEN IT HAPPEN OVER AND OVER AGAIN MANY MANY VERY WELL-SEASONED DEVELOPMENT DEPARTMENTS AND MANY WELL-SEASONED ADMINISTRATION DEPARTMENTS.  
NUMBER FOUR, SPECIAL EVENTS.  
YOU'LL HERE A LOT OF DIFFERENT ADVICE ABOUT SPECIAL EVENTS AND IT SEEMS LIKE SOME BIG ORGANIZATIONS CAN MAKE HUNDREDS OF THOUSANDS OF DOLLARS WITH BIG GALAS.  
BUT BE CAREFUL BECAUSE SPECIAL EVENTS CAN TAKE UP A LOT OF STAFF TIME AND MONEY.  
I MEAN, CATERING IS EXPENSIVE.  
SO MY ADVICE IS IF YOU'VE NEVER DONE A SPECIAL EVENT BEFORE START SMALL AND DON'T THINK OF IT AS A WAY TO RAISE A LOT OF MONEY AT FIRST.  
YOU MAY BE ABLE TO AT SOME POINT MAYBE AFTER YEARS AND YOUR MEMBERS ARE SIGNING UP TO BE MEMBERS SO THEY CAN COME TO THE SPECIAL EVENT BECAUSE IT'S A GOOD WAY TO ENGAGE AND CULTIVATE YOUR MEMBERS.  
BUT THINK OF IT -- THINK OF IT MORE AS A P.R. EVENT.  
AND THAT'S REALLY WHAT A LOT OF SPECIAL EVENTS ARE.  
THEY PROVIDE ANOTHER WAY FOR PEOPLE TO ENGAGE WITH YOUR ORGANIZATION, TO ENGAGE WITH YOUR COLLECTION AND IT ALLOWS YOU TO CULTIVATE YOUR MEMBERS AND I THINK IN KIND OF A NOT-SO-SCARY WAY.  
YOU'RE NOT SITTING DOWN ONE ON ONE WITH PEOPLE.  
YOU'RE IN A GROUP AND YOU'RE JUST PROVIDING A WAY THAT THEY CAN COME BE AT YOUR ORGANIZATION AND BE A PART OF IT.  
AND THE SECOND TO LAST ONE IS EARNED INCOME.  
HERBED INCOME IS SELLING OR RENTING YOUR INSTITUTIONAL OR DEPARTMENTAL RESOURCES FOR EXAMPLE MANY HISTORIC HOUSES HAVE BEAUTIFUL SPACES FOR WEDDINGS AND PARTIES AND AS LONG AS YOU'RE VERY CARINGFUL ABOUT ENFORCING RESTRICTIONS SO THAT YOUR COLLECTIONS STAY SAFE IT'S A GREAT IDEA NOT ONLY TO EARN INCOME BUT ALSO YET ANOTHER OPPORTUNITY FOR PEOPLE TO COLLECTION WITH YOUR COLLECTION AND YOUR SITE.  
HERE AT THE LIBRARY, WE OFTEN ALLOW CAMERA CREWS, AGAIN, WITH RESTRICTED -- VERY RESTRICTED AND MONITORED ACCESS TO FILM IN OUR 1927 HISTORIC BUILDING FOR MOVIES AND TELEVISION COMMERCIALS.  
YOU MIGHT ALSO HAVE PRINTS OR PHOTOGRAPHS IN YOUR COLLECTION THAT YOU MAY WANT TO USE TO CREATE POSTERS OR POSTCARDS OR TOTE BAGS.  
AGAIN, THERE WILL BE MORE IDEAS THROUGHOUT THIS WEBINAR SERIES BUT I WANTED YOU TO GET THE IDEA OF HOW EARNED INCOME CAN BE A PART OF YOUR DEVELOPMENT PLAN.  
AND I KNOW A LOT OF COLLECTIONS PEOPLE ARE VERY NERVOUS ABOUT SPECIAL EVENTS SO YOU REALLY HAVE TO JUST DO WHAT'S BEST FOR YOUR ORGANIZATION.  
YOU MAY HAVE A HISTORIC HOME THAT YOU JUST DON'T WANT TO HAVE ANY KIND OF WINE OR FOOD IN IT.  
AND THAT'S FINE.  
BUT THERE ARE OTHER TYPES OF EVENTS THAT YOU CAN THINK ABOUT.

PERHAPS A SPECIAL COLLECTIONS TOUR.  
THAT IS A SPECIAL EVENT.  
AND WHERE YOU MAY ONLY HAVE TEN PEOPLE AT A TIME OR SOMETHING LIKE THAT.  
JUST KNOW THAT THERE ARE A NUMBER OF WAYS TO DO AN EVENT.  
OKAY, AND THE LAST ONE HERE IS PLANNED GIVING.  
PLANNED GIVING IS ONE OF THE BEST WAYS TO FIND SUPPORT FOR A SPECIAL COLLECTION BECAUSE  
PEOPLE OFTEN HAVE VERY STRONG COLLECTIONS TO EITHER A COLLECTION THAT THEY OR THEIR FAMILY  
DONATED AND THEY WANT TO PROTECT AFTER THEY'RE GONE.  
OR AN ITEM IN YOUR COLLECTION THAT IS CLOSE TO THEM IN SOME WAY AND THEY WANT TO PRO NEKT  
THE FUTURE.  
EXCUSE ME, I HAVE TO TAKE A DRINK OF WATER HERE.  
UNFORTUNATELY, PLANNED GIVING IS ALSO THE SLOWEST FORM OF FUND-RAISING.  
SO IT'S OFTEN THE LAST PIECE OF A DEVELOPMENT PROGRAM TO GET IMPLEMENTED.  
AND IT'S HARD TO CONVINC -- I THINK IT'S HARD TO CONVINC ADMINISTRATION OR YOUR BOARD  
WHO IT'S A GOOD IDEA BECAUSE IT COULD TAKE YEARS TO GET ANYTHING THROUGH HUH PLANNED  
GIVING.  
BUT THE NICE THING ABOUT COLLECTIONS IS THAT THEY REALLY HAVE A SPECIAL -- SUPREME  
PERSONAL ATTACHMENTS TO THEM.  
COLLECTIONS AND TO BUILDINGS, TO HISTORIC BUILDINGS ESPECIALLY.  
SO I THINK IT'S A REALLY GREAT OPPORTUNITY FOR ORGANIZATIONS TO ENGAGE THEIR DONORS IN  
THINKING ABOUT PLANNED GIVING.  
DO YOU HAVE A DONOR WHO'S GIVEN YOU HER ENTIRE VINTAGE COOK BOOK COLLECTION?  
WELL, SHE'S PROBABLY THE PERFECT CANDIDATE TO ADD TO YOUR -- TO ADD YOUR INSTITUTION TO  
HER WILL.  
MY QUICK ADVICE ABOUT PLANNED GIVING IS TO WORK WITH AN EXPERT.  
A PERSON YOU CAN CALL TO ASK ABOUT THE QUESTS OR GIFTS OF STOCK, ETC.  
AND THEN FIGURE OUT HOW TO MAKE THE OPTION OF PLANNED GIVING HOW TO BE PART OF YOUR  
DEVELOPMENT PROGRAM.  
A LOT OF TIMES IT STARTS OUT WITH A LETTER TO PEOPLE WHO HAVE BEEN GIVING TO YOU FOR A  
WHILE AND LETTING THEM KNOW IT'S AVAILABLE AND THERE ARE WAYS THEY CAN GIVE TO THE  
INSTITUTION IN THEIR WILL.  
LET ME -- BEFORE SKI FOR QUESTIONS, LET ME JUST ASK -- I JUST WANTED TO TAKE ANOTHER QUICK  
SURVEY HERE AND FIND OUT IF YOU ARE DOING THESE THINGS ALREADY AND WHAT THE PERCENTAGES  
ARE.  
SO IF YOU GUYS COULD JUST LET ME KNOW.  
>> EXCELLENT.  
I'M GLAD TO SEE THAT SO MANY OF YOU ARE ENGAGING IN SOME KIND OF INDIVIDUAL GIVING, THAT'S  
GREAT.  
INDIVIDUAL GIVING PROGRAM.  
>> AND I SEE PLANNED GIVING IS DEFINITELY THE LOWEST AND THAT'S NOT SURPRISING.  
NOT SURPRISING AT ALL.  
DEFINITELY THINK ABOUT INITIATING A PLANNED GIVING PROGRAM IN YOUR INSTITUTION.  
I DO THINK THAT OVER TIME IT WILL YIELD A LOT OF BENEFITS.  
AND SPECIAL EVENTS.  
71%.  
GREAT.  
I WOULD LOVE TO HAVE A LOT MORE SURVEYS HERE AND FIND OUT WHAT KIND OF SPECIAL EVENTS AND  
WHAT WHAT KIND OF INDIVIDUAL GIVING BUT, OF COURSE, WE CAN'T REALLY THAT.  
OKAY.  
>> ANY QUESTIONS?  
>> YEAH, WE DO HAVE QUITE A FEW QUESTIONS AND SOME OF THEMLY HOLD ON TO BECAUSE I THINK  
WE'LL ADDRESS THEM IN OTHER WEBINARS.  
MARCIA HAS A QUESTION.  
"DOES PLANNED GIVING INCLUDE CHARITABLE ESTATE PLANNING?"

>> YES, IT DOES.

YOU KNOW, A LOT OF PLANNED GIVING IS SO ABOVE AND BEYOND WHATEVER A LOT OF DEVELOPMENT -- ESPECIALLY IF YOU'RE A SMALL DEVELOPMENT DEPARTMENT, IF YOUR INSTITUTION HAS A SMALL DEVELOPMENT DEPARTMENT, A LOT OF PLANNED GIVING IS SO LEGAL -- THERE'S A LOT OF LEGAL STUFF INVOLVED AND SO, FOR EXAMPLE, WE HAVE SOMEONE WHO WE CALL. OUR PLANNED GIVING PROGRAM HERE IS JUST -- JUST GETTING STARTED. WE HAVEN'T HAD ONE BEFORE.

BUT INSTEAD OF BECOMING AN EXPERT MYSELF, I AM GOING TO RELY ON SOMEONE WHO HANDLES THESE KINDS OF LEGALITIES AND PROVIDE FOR MY DONORS A -- MY PERSONAL NUMBER SO THAT THEY CAN CALL ME.

I MEAN, PLANNED GIVING IS A VERY PERSONAL GIFT AND IT'S SOMETHING THAT PEOPLE -- I THINK IT'S HARD TO TALK ABOUT BECAUSE IT MEANS THAT SOMEONE HAS PASSED AWAY AND A LOT OF -- NOT IN EVERY SITUATION BUT IN -- IF YOU'RE LOOKING AT PUTTING SOMETHING IN YOUR WILL.

SO IT CAN FEEL SENSITIVE.

SO FOR MY PLANNED GIVING PROGRAM I WANT TO PROVIDE MY DONORS WITH MY PERSONAL PHONE NUMBER, GIVE THEM MY NAME, AND MAKE AN INQUIRY BE A VERY PERSONAL THING.

AND TO -- TO I GUESS INITIATE THE GIFT I WILL -- I HAVE AN EXPERT THAT I CAN TALK TO TO HELP ME WITH THAT.

>> AND THEN WE VALUE A QUESTION FROM REBECCA IN NEW YORK WHO'S CURIOUS ABOUT WHAT YOUR THOUGHTS ARE ABOUT HIRING A PROFESSIONAL FUND-RAISING ASSOCIATION LIKE GUIDESTAR.

>> ABOUT HIRING?

>> UH-HUH.

HIRING OUT A FUND-RAISING ASSOCIATION.

>> WELL, LET'S -- I THINK WE -- I'LL TOUCH ON THAT A LITTLE BIT IN THE NEXT SECTION ON STAFFING AND HIRING AND I HOPE THAT I CAN ANSWER HER QUESTION THEN IN THE NEXT ONE.

>> OKAY, AND THEN MARCIA WAS CURIOUS IF WE'LL TALK ABOUT IN-KIND DONATIONS IN THEIR TAX STATUS.

>> OH, THAT'S SUCH A GREAT QUESTION!

WE'RE NOT GOING TO TALK ABOUT IN-KIND DONATIONS BUT VICTIM EASILY ADDED THAT TO THIS. YEAH.

IN-KIND DONATIONS, PROBABLY EVERYBODY IS GETTING SOME KIND OF IN-KIND DONATIONS AND THAT IS ANOTHER THING.

OBVIOUSLY IT'S ONE OF THE LAST THINGS PEOPLE THINK ABOUT.

I DIDN'T EVEN PUT IT ON MY SLIDE HERE.

BUT I WOULD ENCOURAGE YOU TO TRACK YOUR IN-KIND DONATIONS USING SOME KIND OF DONOR SOFTWARE AND YOU'LL PROBABLY BE SURPRISED BY THE KIND OF IN-KIND DONATIONS YOU'RE GETTING. BUT YOU SHOULD DEFINITELY WHEN YOU GET A GIFT-- AND FOR THOSE OF YOU WHO DON'T KNOW WHAT AN IN-KIND DONATION IS-- THAT'S BASICALLY A GIFT OF GOODS OR SERVICES, NOT MONEY. SO LET'S SAY SOMEONE DONATED A NEW COMPUTER, CHILDREN'S COMPUTER TO YOUR CHILDREN'S DEPARTMENT.

OR -- WELL, I'M THINKING OF PUBLIC LIBRARIES HERE.

BUT LET'S SAY SOMEONE DONATED A SCANNER TO YOUR ARCHIVES.

THAT IS AN IN-KIND DONATION AND THAT PERSON SHOULD GET A TAX-EXEMPT -- SHOULD GET A TAX LETTER, A LETTER THAT SAYS THAT WHAT THEY DONATED IS TAX DEDUCTIBLE.

AND THEY WOULD PROVIDE THE AMOUNT TO THEIR ACCOUNTANT OR TO THE I.R.S. OR HOW MUCH THAT WOULD BE.

>> THANK YOU, KELSEY.

WE HAVE ABOUT 15 MINUTES LEFT SO I'M GOING TO LET YOU GET BACK TO THE SLIDE.

>> SOUNDS GOOD.

OKAY.

ALL RIGHT, SO FINALLY WE'RE GOING TO GET TO STAFFING.

A FEW OF YOU HAVE QUESTIONS ABOUT THIS.

THIS IS SUCH A HARD -- THIS IS A HARD THING TO TALK ABOUT WHEN I'M TALKING TO SO MANY -- A VARIETY OF SO MANY DIFFERENT SIZES OF ORGANIZATIONS THAT HAVE DIFFERENT RESOURCES.

SO I'M GOING TO KIND OF BREAK IT DOWN INTO THREE POSSIBILITIES AND BY ALL MINE THIS IS IS A -- THESE AREN'T THE ONLY THREE.

BUT I THINK THAT ALL THREE HOPEFULLY WILL -- YOU CAN PULL FROM THEM WHAT YOU NEED.

FIRST OF ALL, I WANT YOU TO ALL TO KNOW THAT IF YOU ARE -- IF YOU DO HAVE A FOUNDATION OR A FRIENDS GROUP OR EVEN JUST YOUR REGULAR BOARD, WHOEVER IS IN CHARGE OF FELON THROEPEY FOR YOUR INSTITUTION, JUST BECAUSE THAT'S THE GROUP'S MISSION DOES NOT MEAN THAT THEY KNOW HOW TO RAISE MONEY.

IT ONLY MEANS THEY'RE WILLING TO BE USED-- THEIR KNOWLEDGE, THEIR CONNECTIONS, AND THEIR FINANCIAL RESOURCES TO MEET THE END GOALS OF THE ORGANIZATION.

AND LIKELY YOUR BOARDS ARE VERY BUSY PEOPLE AND THEY JUST -- THEY DON'T TIME TO SIT DOWN AND FIGURE IT OUT.

BUT THEY HAVE OFFERED THEMSELVES TO BE LED.

AND SO SOMEBODY ON YOUR STAFF HAS TO BE IN CHARGE OF THEM.

YOU HAVE TO HAVE A LIAISON, WHETHER IT'S THE DIRECTOR DEPENDING ON THE SIZE OF YOUR INSTITUTION, THE DIRECTOR, THE DEVELOPMENT DIRECTOR, OR SOME SORT OF LIAISON WHO CAN TELL YOUR BOARD WHAT TO DO AND HOW -- HOW YOU NEED THEIR HELP.

AND THAT'S EVEN A WHOLE OTHER WEBINAR WE COULD PROBABLY USE, HOW TO UTILIZE YOUR BOARD FOR FUND-RAISING.

I CAN'T TELL YOU HOW MANY TIMES I'VE HEARD "WELL, MY BOARD WON'T DO THIS" AND "MY BOARD WON'T DO THAT."

WELL, YOU HAVE TO TELL YOUR BOARD WHAT TO DO.

THEY MAY NOT KNOW.

THEY'VE PROBABLY BEEN IN OTHER BUSINESSES THEIR WHOLE LIVES AND THEY'RE NOT FUND-RAISERS.

SO THE BEST-CASE SCENARIO, IF YOU HAVE MONEY IN YOUR BUDGET, HIRE A DEVELOPMENT DIRECTOR. OF COURSE, I'M VERY BIASED SAYING THIS BECAUSE I AM ONE.

BUT I -- I JUST THINK THAT IT WILL -- IT'S WORTH IT.

IT'S WORTH IT BECAUSE THE DEVELOPMENT DIRECTOR WILL EVENTUALLY-- IF THEY'RE GOOD AT WHAT THEY DO-- PAY FOR THEIR OWN POSITION AND THEN SOME.

I GET A LOT OF QUESTIONS LIKE "CAN I GET A GRANT FOR A DEVELOPMENT DIRECTOR?"

WELL, THE ANSWER IS YES, TECHNICALLY.

THERE ARE GRANTS OUT THERE FOR DEVELOPMENT DIRECTORS.

OR DEVELOPMENT PROFESSIONALS.

I HAVE SEEN A COUPLE OF INSTITUTIONS GET GRANTS TO PAY FOR DEVELOPMENT PROFESSIONALS FOR A FEW YEARS TO GET A DEVELOPMENT PROGRAM STARTED.

IF YOU'RE IN A LARGER CITY YOU COULD PROBABLY TRY YOUR COMMUNITY FOUNDATION.

A LOT OF COMMUNITY FOUNDATIONS WILL FUND FOR CAPACITY-TYPE GRANTS.

YOU MIGHT WANT TO TRY A LOCAL FAMILY FOUNDATION.

A LOT OF TIMES THEY WILL FUND FOR CAPACITY LIKE DEVELOPMENT DIRECTORS.

SO, YES, IT'S POSSIBLE.

IT'S NOT ALWAYS PROBABLE.

IF YOU WORK FOR A PUBLIC LIBRARY OR A MUSEUM WHERE WILL YOU HAVE A CERTAIN NUMBER OF POSITIONS THAT CAN BE MOVED AROUND I WOULD CONSIDER THAT AS AN OPTION.

THIS WAS THE CASE AT MY LIBRARY.

ALTHOUGH WE HAD A GRANTS WRITER ALREADY ON STAFF, ADMINISTRATION KNEW THAT WE NEEDED A STRONGER EFFORT.

OUR FUNDING HAD BEEN CUT -- IT HAS BEEN CUT BY THE CITY FOR THE LAST THREE YEARS IN A ROW. AND LAST YEAR THE ADMINISTRATION KNEW THAT WE HAD TO FIND FUNDING IN NEW PLACES.

THAT WE WEREN'T GOING TO BE -- ALL OF THE THINGS THAT WE WANTED TO DO WERE NOT GOING TO BE SUSTAINED BY OUR CITY BUDGET.

SO WHEN ONE OF THE LIBRARIANS IN OUR BUSINESS SCIENCE AND TECHNOLOGY DEPARTMENT RETIRED THEY USED HER POSITION TO CREATE A DEVELOPMENT DEPARTMENT AND MERGED TWO OF OUR PUBLIC SERVICE DEPARTMENTS TOGETHER UNDER ONE HEAD LIBRARIAN.

AND THIS IS AN IMPORTANT POINT IF YOU WORK FOR A PUBLIC LIBRARY.

I'M NOT GOING TO GET INTO THE DETAILS OF HOW LIBRARIES ARE CHANGING AND HOW THEY NEED TO

EVOLVE, BUT ONE THING WAS CLEAR TO US, AND THAT WAS THAT WE NEEDED MORE HUMAN RESOURCES IN OUR BEHIND-THE-SCENES DEPARTMENTS, IN DEVELOPMENT, P.R., IT, ET CETERA, AND FEWER HUMAN RESOURCES AT THE REFERENCE DESKS.

SO GET A DEVELOPMENT DIRECTOR FOR US WAS WORTH THE COST OF MERGING TWO DEPARTMENTS.

BUT THAT'S VERY PUBLIC LIBRARY FOCUSED AND I'M GOING TO MOVE ON FROM THERE.

SO THAT'S THE FIRST ONE, HIRE A DEVELOPMENT PROFESSIONAL.

THE SECOND ONE: TRAIN STAFF.

IN SMALLER INSTITUTIONS, DEVELOPMENT ACTIVITIES MAY FALL ON THE DIRECTOR.

AND IF I HAD ANOTHER LITTLE SURVEY HERE I'D ASK YOU HOW MANY OF YOU ARE THE DIRECTOR AND HOW MANY OF YOU ARE IN CHARGE OF YOUR FUND-RAISING ALL BY YOURSELF?

PROBABLY A LOT OF YOU.

IF THIS IS THE CASE AND YOU HAVE NO PHILANTHROPY EXPERIENCE, PLEASE DON'T GO IT ALONE.

EITHER FIND TRAINING OPPORTUNITIES OR USE A CONSULTANT, WHICH I'LL GET TO THAT LAST ONE HERE IN A SECOND.

BUT IN THE RESOURCES THAT I'M GOING TO GIVE YOU AT THE END OF THIS, I HAVE ADDED A COUPLE OF PLACES THAT IF YOU DO HAVE TO DO THE DEVELOPMENT FOR YOUR ORGANIZATION THAT YOU SHOULD BECOME A MEMBER OF.

ONE OF THEM THAT I BELONG TO IS THE ASSOCIATION OF FUND-RAISING PROFESSIONALS.

AND I'M GOING TO GIVE THEM A LITTLE PLUG BECAUSE THEY'RE NATIONAL BUT THEY'RE ALSO LOCAL.

THEY HAVE LOCAL OFFICES WHERE YOU CAN FIND TRAINING IN A NEARBY CITY OR IN YOUR CITY DEPENDING ON WHERE YOU ARE.

SO I DEFINITELY WOULD ENCOURAGE ANYONE WHO NEEDS TRAINING TO BECOME A PART OF THAT ORGANIZATION.

BECAUSE THEY DO HAVE A LOT OF TRAINING OPPORTUNITIES.

OKAY.

AND FINALLY, I KNOW WE HAD A QUESTION ABOUT THIS BEFORE, HIRE A CONSULTANT IF YOU CAN TO DEVELOP A STRATEGY.

IF YOU DON'T HAVE A DEVELOPMENT PROGRAM OR IF YOU HAVE ONE THAT YOU DON'T FEEL REALLY MEETS THE NEEDS OF THE ORGANIZATION, I WOULD HIRE A CONSULTANT TO DO THAT FIRST, TO CREATE A PLAN FIRST.

AS I'VE BEEN SAYING IN THIS WEBINAR ALREADY.

PLANNING, REALLY, I THINK IS THE MOST IMPORTANT GROUND WORK THAT YOU CAN LAY AND YOU HAVE TO START WITH SOMEONE WHO CAN LOOK AT THE BIG PICTURE, LOOK AT YOUR COMMUNITY, LOOK AT YOUR PROGRAM, LOOK AT WHAT YOU NEED, AND LOOK AT YOUR STRATEGIC PLAN AND HELP YOU PUT TOGETHER THE BEST DEVELOPMENT PROGRAM, THE BEST TYPES OF DEVELOPMENT STRATEGIES FOR YOUR ORGANIZATION.

AND IF YOU HAVE TO USE A CONSULTANT, IF YOU WANT TO USE A CONSULTANT I WOULD START THERE RATHER THAN JUST FARMING OUT GRANT PROPOSALS OR FARMING OUT SPECIAL EVENTS.

YOU MAY GET TO THE POINT WHERE YOU REALIZE THAT THOSE THINGS ARE THE BEST STRATEGIES FOR YOUR ORGANIZATION, BUT FIGURE THAT OUT FIRST.

MAKE -- YOU KNOW, MAKE THAT THE PLAN FIRST BEFORE YOU MOVE ON.

>> ALONG THOSE LINES-- WE'RE GETTING CLOSE TO THE END HERE SO I JUST NEED TO QUICKLY -- WHOOPS.

OH, I'M MISSING ONE.

WELL, I HAD ANOTHER SLIDE THAT BASICALLY TALKS ABOUT THE DOS AND DON'TS OF STAFFING SO I'M GOING TO GO THROUGH THOSE REALLY QUICKLY.

FIRST OF ALL, DON'T RELY ON YOUR GRANT WRITER TO BE YOUR DEVELOPMENT DIRECTOR.

I MEAN, SOMETIMES IT MIGHT WORK, BUT OFTEN GRANT WRITERS AND DEVELOPMENT DIRECTORS HAVE VERY DIFFERENT SKILL SETS.

IN GENERAL, GRANT WRITERS ARE EXCELLENT COMMUNICATORS OF COMPLICATED INFORMATION ON PAPER AND THEY CAN TAKE BIG CONCEPTS OR COMPLEX PROJECTS AND CLARIFY THEM FOR A PARTICULAR AUDIENCE.

DEVELOPMENT DIRECTORS AGAIN GENERALLY ARE OFTEN GOOD COMMUNICATORS IN WRITING AND IN PERSON AND WILL NOT BE AFRAID TO MAKE AN ASK FOR MUST BE WHEN THE TIME IS RIGHT.

DEVELOPMENT DIRECTORS CAN SEE THE OVERALL DEVELOPMENT PLAN AND DECIDE WHICH PIECES OF THAT PLAN WILL WORK BEST FOR YOUR INSTITUTION.

IF YOU HAVE TO USE SOMEONE ON YOUR STAFF IF YOU DON'T HAVE THE RESOURCES TO HIRE SOMEONE, THEN, YOU KNOW, THIS IS WHERE IT GETS DIFFICULT.

YOU'RE GOING TO HAVE TO THINK ABOUT WHAT YOUR INSTITUTION NEEDS.

DO THEY NEED -- DO THEY NEED A GRANT WRITER?

DO THEY NEED A STRATEGIC PLANNER?

AND DEFINITELY HIRE BASED ON WHAT YOUR NEEDS ARE.

DO NOT PAY FOR A GRANT WRITER OR A DEVELOPMENT PERSON THROUGH A GRANT.

IN OTHER WORDS, DON'T WRITE -- DON'T ASK SOMEONE TO WRITE A GRANT AND THEN ASK THAT PERSON TO PUT THEIR OWN SALARY IN THE BUDGET.

I'VE SEEN THIS HAPPEN OFTEN.

IF THIS IS SIMPLY BAD PRACTICE IN THE DEVELOPMENT FIELD.

REMEMBER THAT YOU ARE HIRING SOMEONE TO WRITE A GRANT, NOT TO GET A GRANT.

THE GRANT WRITER YOU HIRE MAY WRITE THE MOST INCREDIBLE GRANT PROPOSAL HE HAS EVER WRITTEN BUT THE FOUNDATION MAY DECIDE NOT TO FUND IT FOR REASONS BEYOND THE GRANT WRITER'S CONTROL.

SO YOU'RE PAYING A GRANT WRITER FOR THEIR TIME, NOT NECESSARILY FOR THEIR SUCCESS.

SO TO ENSURE A CONTRACTED GRANT WRITER WILL WRITE A GOOD GRANT PROPOSAL, DO YOUR HOME WORK.

HIRE SOMEONE WHO IS EXPERIENCED WITH GOOD WRITING SAMPLES AND GOOD REFERENCES.

FINALLY, DON'T BASE YOUR DEVELOPMENT PROGRAM ON ANOTHER INSTITUTION'S DEVELOPMENT PROGRAM.

YOU CAN LOOK AT OTHER INSTITUTIONS, DEFINITELY COMPARE AND CONTRAST, GET IDEAS, BUT BASE YOUR OWN -- BUT YOUR DEVELOPMENT PROGRAM ON YOUR INSTITUTION AND WHAT YOU NEED.

I KNOW I'M RUNNING OUT OF TIME HERE.

SHOULD I -- JENNY, DO YOU WANT TO STOP FOR A QUICK COUPLE OF QUESTIONS?

I DO HAVE A COUPLE OF DOS, BUT IT MIGHT BE -- THE QUESTIONS MIGHT BE MORE IMPORTANT AT THIS POINT.

>> NO, ACTUALLY, I THINK A LOT OF THEM WE'LL ADDRESS IN FUTURE WEBINARS AND I'LL JUST KIND OF HOLD ON TO THESE QUESTIONS AND, KELSEY, I MIGHT BUG YOU AFTER THE FACT TO SEE IF THERE'S ANYTHING YOU CAN ANSWER.

WE'LL PROVIDE THOSE TO EVERYONE ON THE WEB SITE.

I HAVE KNOWN YOU'RE GETTING TO HOME WORK AND I DO HAVE A LINK FOR THAT.

SO WHY DON'T YOU GO AHEAD AND I'LL PULL MY LINK OVER.

>> OKAY.

WELL, JUST A COUPLE OF DOS WHEN YOU'RE THINKING ABOUT PLANNING FOR DEVELOPMENT.

AS I SAID BEFORE, HIRE A CONSULTANT TO HELP YOU WITH THE PLANNING.

THAT'S A DO, I THINK, TO START WITH.

THE SECOND DO I HAVE THAT IS IF YOU ARE DOING A BIG CAPITAL CAMPAIGN OR BIG PROJECT THAT TSE BEYOND WHAT YOUR STAFF CAN REALLY HANDLE, ESPECIALLY IF YOU'RE USING YOUR STAFF FOR FUND-RAISING, I WOULD HIRE THAT OUT AS WELL.

I THINK THAT BEYOND YOUR REGULAR PROGRAMMING PROJECTS THAT YOU HAVE TO FUND RAISE FOR, IF YOU'RE DOING SOMETHING BIG, YOU MIGHT WANT TO THINK ABOUT HIRING A CONSULTANT FOR A SHORT TIME TO PUT THAT TOGETHER FOR YOU.

AND THAT INCLUDES THE CAPITAL CAMPAIGNS.

SO HOME WORK.

JENNY, ARE YOU READY TO GO ON TO THAT?

>> YES, GO AHEAD.

>> OKAY, YOUR HOME WORK ASSIGNMENT.

FIRST OF ALL, FIND OUT IF YOUR ORGANIZATION HAS A STRATEGIC PLAN AND IF SO, READ IT.

I DON'T THINK A LOT OF PEOPLE HAVE READ OUR OWN ORGANIZATION'S STRATEGIC PLANS AND ANSWER THESE QUESTIONS, NOT ALL OF THEM WILL BE APPLICABLE TO YOU BUT IT DEPENDS ON THE SIZE OF YOUR ORGANIZATION.

ANSWER IS THIS PLAN ENOUGH OR DO I NEED A DEPARTMENTAL PLAN ALSO?

HOW DOES OR CAN MY DEPARTMENTAL PLAN FIT WITHIN THE BOUNDARIES OF THE STRATEGIC PLAN?  
SO BASICALLY THAT DEPENDS ON THE SIZE OF YOUR ORGANIZATION, I THINK.  
B, IF YOU DO NOT WORK FOR AN ORGANIZATION OR IF YOUR ORGANIZATION HAS NO STRATEGIC PLAN  
USE THIS ONE FROM BIRMINGHAM PUBLIC LIBRARY AND JENNY I THINK YOU'LL PROVIDE A LINK TO  
THAT.

>> YES IN THE HOME WORK ASSIGNMENT.

AND I COVERED UP YOUR FACE, KELSEY, I'M SORRY.

BUT THAT HOME WORK ASSIGNMENT IS RIGHT NOW OVER WHERE KELSEY'S FACE WAS.

SO IT'S A SURVEY MONKEY POSTED HERE.

YOU'LL GET HIT IN THE E-MAIL AND ALSO ON THE COURSE WEB PAGE.

>> GREAT.

SO LOOK THROUGH OUR STRATEGIC PLAN IF YOU DON'T HAVE ONE AND WHAT I'VE GIVEN YOU IS JUST  
KIND OF A SMALL PART OF OUR STRATEGIC PLAN.

IT'S THE GOALS, OBJECTIVES, AND TACTICS OF OUR PLAN.

IT'S BASICALLY THE MEAT.

IT'S THE STUFF WE HAVE TO DO.

IT'S NOT ALL THE OTHER STUFF THAT COMES WITH IT SO I HOPE THAT WILL HELP.

THE PART TWO OF THE HOME WORK ASSIGNMENT ASK YOURSELF OR YOUR STAFF IF YOU HAVE A  
COLLECTIONS CARE PLAN, HAS YOUR ORGANIZATION HAD A CONSERVATION ASSESSMENT AND IF YOU  
DON'T WORK FOR AN ORGANIZATION OR YOUR ORGANIZATION DOES NOT HAVE THE ABOVE GO TO THE LINK  
THERE, THAT'S THE CONSERVATION

ASSESSMENT PROGRAM I WAS TALKING ABOUT EARLIER AND READ ABOUT HOW TO GET A GRANT FOR  
CONSERVATION ASSESSMENT.

I THINK THAT'S PRIORITY ONE.

AND THAT'S ALL I HAVE I KNOW WE TOUCHED ON A LOT OF THINGS IN THIS WEBINAR THAT I KNOW YOU  
HAVE A LOT OF QUESTIONS AND I THINK PROBABLY FOR A LOT OF YOUR YOU QUESTIONS WILL BE  
ANSWERED IN THE FOLLOWING WEBINARS.

AND I KNOW FOR MINE IN PARTICULAR WEBINAR NUMBER THREE WILL LOOK AT HOW TO IDENTIFY  
DONORS, HOW TO CULTIVATE DONORS KNOWING HOW AND WHEN TO MAKE THE ASK.

MORE ON MEMBERSHIP PROGRAMS AND THANKING AND TRACK DOG OR INS.

SO WE'LL GET MORE DETAILED AND ANSWER QUESTION YOU MAY HAVE.

>> THANK YOU, SO MUCH, KELSEY.

SO YOU HAVE THIS HOME WORK ASSIGNMENT.

YOU CAN ALSO FIND IT ON THAT COURSE WEB PAGE WHICH HERE'S A LINK TO THAT.

I'M GOING TO ASK BEFORE OUR GROUPS LOG OFF WE HAVE YOU AND WE'VE MARKED YOU DOWN AS  
ATTENDANCE BUT IF YOU'RE SIGNING ON AS A GROUP SO YOU DENT -- ONLY ONE PERSON PUT THEIR  
NAME IF, IF YOU CAN FILL OUT THE NAMES OF THE REST OF THE FOLKS WHO HAVE BEEN WATCHING WE  
CAN MAKE SURE TO MARK YOUR OFF.

SO THOSE ARE ONLY FOR PEOPLE WATCHING GROUPS AND REGISTERED AND INTERESTED IN EARNING THE  
CERTIFICATE.

OUR NEXT WEBINAR WILL BE THIS WEDNESDAY AT 2:00 P.M. EASTERN, SAME PLACE, AND SAME TIME.

I WANT TO REMIND YOU IN THE E-MAILS AS WELL FOR OUR FOURTH WEBINAR WHICH IS OCTOBER 3, WE  
HAVE SOME READING THAT WE'D LIKE YOU DO BEFOREHAND.

THAT WEBINAR WILL BE ABOUT GRANT WRITING AND WE HAVE THREE GRANT MATERIAL THAT WE'D LIKE  
YOU TO READ BEFORE THEM SINCE WE'LL GO THROUGH THIS THEM A LOT OF DETAIL.

KELSEY, THANK YOU SO MUCH AND THANK YOU, EVERYONE, FOR JOINING US!

PLEASE E-MAIL US IF YOU HAVE QUESTIONS AND HAVE A GREAT AFTERNOON!

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