BOARD ACADEMY

This publication shares information of interest to public library boards. Links to the resources and full content can be found in the e-newsletter version.

WHAT'S GOING ON IN THE ECOSYSTEM?

STATE BUDGET

TThe Pennsylvania General Assembly passed the 2023-2024 budget earlier this year, accounting for flat funding for the Public Library Subsidy line. This line provides State Aid to local libraries, County Coordination Aid programs, District Services, and the four statewide Resource libraries.

In order to distribute State Aid, the General Assembly composes fiscal language describing how to allocate funds and if they will permit waivers. Due to the delay in finalizing this language, the Office of Commonwealth Libraries cannot distribute any State Aid. Typically, Districts receive their funding in late Summer, and they are going on five months without their fixed income. We’re hoping the language passes soon so as not to affect local library distributions, but we have no firm word and it is not on Legislative Calendars as of this email.

PROPOSED LEGISLATION

SB7: Sexually Explicit Content in Schools

SB7 is a bill that requires schools to identify materials with sexually explicit content and allow parents to opt out. The bill requires “(2) Directly identifying books within libraries of the schools containing sexually explicit content that are used by or made available to students at schools in the school entity.” This is not an achievable standard for librarians as there is no way for one person to read every book in the library to make sure this content is there, nor is there a standard review source that identifies books as such.

Committee members have pointed out that the requirements of the bill are almost impossible without the funding to provide dedicated school librarians, as the requirements for the schools are onerous. The bill passed the Senate by a vote of 29-21 and is now in the House. Democrats and Republicans are largely divided on seeing the bill as censorship/book banning vs. parental authority, which does leave its future between the divided General Assembly.

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WHAT'S GOING ON IN THE ECOSYSTEM? (CONT'D)

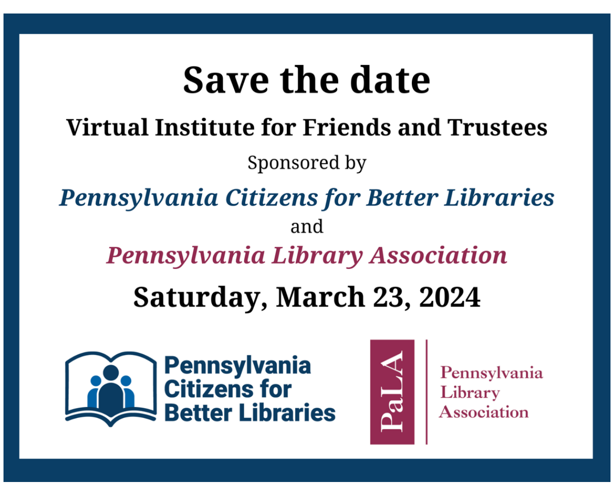
LIBRARY REGULATIONS UPDATE

The Library Code is composed of two parts: the Statutes and the Regulations. The Statutes are law, passed by the Legislature, and can only be edited by an act of the Assembly. The Regulations enact the Statutes and provide better clarity and definitions for the broader terms contained in the law. For example: The statute requires that libraries receiving Incentive for Excellence Aid must spend 12% of their operating expenditures on collections. The Regulations cannot change the 12% number, but they can define what a collection expenditure is.

Our current Regulations have not been updated since the 1980s and do not properly enact the 2012 statute revisions. The Office of Commonwealth Libraries have been working over the past year to revise the Regulations and expect to have a draft available for review and comment by library staff and trustees early in 2024. (Keep in mind that this is a first step in a long process - the earliest new regulations could be in force would be 2026.)

We will keep you updated on the process. There are no hints yet as to the actual regulations, but the length has been reduced from 70+ pages to 14, so they will not be as daunting.

VIRTUAL INSTITUTE FOR FRIENDS AND TRUSTEES



Pennsylvania Citizens for Public Libraries and Pennsylvania Library Association present:

Virtual Institute for Friends and Trustees
Saturday, March 23, 2024 (Save the Date)

Interact and engage with other trustees and friends group members through a training session focused on these important roles.

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TIMELY TOPICS

FUNDRAISING

As we head into year-end giving season and into 2024, keep these tips in mind to maintain new and long-time donors:

- "The Elements of a Good Touch Point" by Richard Perry and Jeff Schreifels for Veritus Group
- "Sample [List of] Donor Touch Points" from Chad Barger of Productive Fundraising
- Ways to Say Thank You to Nonprofit Donors from Bloomerang

(Keep in mind: If you plan on using donor names/images publicly, ask for their permission--not all donors want public recognition.

These documents can be found at the end of this packet.

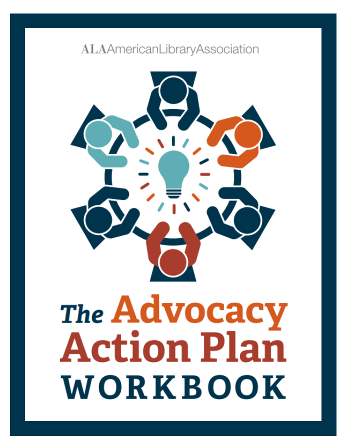
ADVOCACY

From American Library Association (ALA):

Advocacy is a year-round commitment to building relationships with elected officials and decision makers at every level of government. Strengthening these connections help promote an understanding of the economic, cultural, and community values of libraries at the local, statewide, and national levels.

ALA offers a new workbook to help libraries create an action plan for library advocacy on any issue. It will help you focus on what you need to do, how you intend to get it done, and how to ensure that the timing is maximized for the best results. It will also help you document your efforts for evaluation and future planning. The activities contained in this guide are suggestions that can be shaped and adapted to your specific needs; the biggest step in advocacy is your first one—don't wait to get started!

Please note: Due to the size of this workbook (36 pages), it will not be attached to this packet. Please see your library director or reach out to your district consultant to get a printed copy. https://www.ala.org/advocacy/sites/ala.org.advocacy/files/content/Advocacy_Action_Plan_Wkbk_web_030523.pdf



BOARD ACADEMY

SNOE Region Libraries

This publication shares information of interest to public library boards. Links to the resources and full content can be found in the e-newsletter version.

SPOTLIGHT ON LEARNING

SIMPLIFIED FUNDRAISING PLAN FOR SMALL NONPROFITS

Wednesday, November 29 from 1 p.m. - 2 p.m.

Join fundraising master trainer, Chad Barger, CFRE, for a workshop covering some of the biggest mistakes that nonprofit organizations make when putting together their annual fundraising plan. Processes and tools will be shared which pare the planning process down to its simplest form. Attendees leave with actionable steps that they can take to make their organization's planning process more effective.

Other free, upcoming webinars include:

The Top Actionable Fundraising Tips, Tools, & Resources I Discovered in 2023
Thursday, December 14 from 1 p.m. - 2 p.m.

Chad spends the first half hour of every workday reading the latest fundraising research and tales of what's working on the front lines. He translates that data into practical tips that you can immediately put into action in your shop. During this fast-paced webinar Chad will share his top actionable fundraising tips, tool and resources that he discovered in 2023.

Annual Reports: Simplifying the Process for Maximum Donor Engagement
Wednesday, January 31, 2024 at 1 p.m.
*These are reports and information shared with donors, municipalities, and the general public. Not to be confused with the reports submitted to the Office of Commonwealth Libraries during the first quarter of each year.

Chad will review the evolution of annual reports over the last 20+ years and provide multiple real life examples of what is working today. The focus of the session is on designing an annual report that donors actually want to read. Participants will leave the workshop with templates and samples to make implementing the best practices a breeze at their nonprofit organization.

Register for any of these webinars or future offerings at
https://productivefundraising.com/events/

BOARD ACADEMY

This publication shares information of interest to public library boards. Links to the resources and full content can be found in the e-newsletter version.

SNOE REGION

We've been hearing from board members that they would like to learn more about their role on the board, within the library, and library-related information from across the State. So, we're coming to you with a new publication: Board Academy. This will be distributed by e-mail about 4 times a year, with special editions to cover major breaking news. There will also be a PDF version available to print for distribution to other members of your board. While SNOE had previously put energy into the SNOEBall Advocacy e-newsletters, those resources will be converted to a webpage soon for on-demand access.

The SNOE Region is a cooperative initiative of the Seneca, New Castle, Oil Creek, and Erie & Crawford Library Districts to help develop and strengthen the libraries in Northwestern Pennsylvania.

This information is provided to the best of our knowledge as of the date provided. Information is subject to change without notice. While authoritative, it is not guaranteed for accuracy or legalities. If there are questions, please reach out to your district consultant, who may encourage your library to ask a local solicitor/lawyer for further guidance.

If you have any questions about this publication or previous editions' content, feel free to reach out to all of the SNOE Region's District Consultants at consultant@snoelibraries.org. If you have questions on any topics related to board governance, duties, advocacy, or libraries, please feel free to reach out to your library's District Consultant:

Leslie LaBarte, Seneca Library District: districtconsultant@senecadistrictlibraries.org

Neva Lilla, New Castle Library District: nlilla@ncdlc.org

Erin Joyce, Oil Creek Library District: consultant@oilcreek.org

Jessica Church, Erie & Crawford Library District: districtconsultant@eriecountypa.gov

"The Elements of a Good Touch Point"

By Richard Perry and Jeff Schreifels – January 25, 2023 for Veritus Group
https://veritusgroup.com/the-elements-of-a-good-touch-point/

You're creating a plan for the qualified donor on your caseload. You need some good touch points – effective and compelling – touch points that will make the donor feel known and appreciated. But what should they be? How do you know that the touch point you are thinking about is a good one? We have compiled a list of the elements behind good touch points – attributes and characteristics that, if followed, will help you create **relevant** touch points that **connect** with your donors!

Here's what a good touch point looks like:
(You can choose to focus on just one of these elements, or build a touch point that includes a combination of the below.)

1. **It has more to do with the donor than your organization.**
   You know this already. Your touch point is about the donor. Not your organization. Not you. The donor. Keep it that way.

2. **It has something to do with the donor's interests and passions.**
   This one is not surprising given that Jeff and I, and our Veritus team, are constantly harping on it. We keep saying it because it is central to your success as a frontline fundraiser – helping fulfill the passions and interests of donors.

3. **It *tells* the donor that their giving made a difference.**
   Right behind passions and interests is this one – telling the donor their giving made a difference. If you don't do this right, you will lose the donor very quickly.

4. **It *proves* to the donor that their giving made a difference.**
   Whereas #3 above is about TELLING the donor the difference they are making this one is sharing outside information that a difference is happening. It's one thing for someone inside the organization to say it – but that insider is an insider. What else would you expect them to say? You see what I mean? Here I am talking about an outsider talking about the difference the organization is making. It could be a news article, the association the organization belongs to, another leader in the sector or even another donor.

5. **It's thoughtful and respectful.**
   It shows the donor you know them – that you are aware of the details of who they are – not every little private detail and that would get close to stalking. I'm talking about those bits of information that prove to the donor that they are unique to you – that they are special and matter.

6. **It celebrates an event in the donor's life.**
   It could be a birthday, an anniversary, a professional or personal achievement – those celebrations that tell the donor you knew about it and your noticed and took the effort to celebrate.

7. **It gives third party information about the work your organization does.**
   Similar to #4 above but different in that this point is about good outside information about the organization from a third party: a sister organization, a civic group, a government official, a thought leader in the sector, a news article, an investor, a celebrity, etc.
8. **It gives the donor another opportunity to invest.**
   Every good donor plan has a "giving" opportunity in it – in fact there may be several. Many frontline fundraisers tend to shy away from this point wrongly thinking that it is intrusive and bothersome to the donor. Nothing could be further from the truth. When you are talking to a donor about something THEY want to do – something they REALLY CARE about – when you do that, that donor is interested, thankful and engaged. You have given the donor a bit of information on what more they could do. And that is good. Do not forget to put these in your touch point plan.

There you have it: the elements behind good and effective touch points. Notice that most of them are donor-focused and are focused on the good that's being done *generally* as well as the good the donor is *specifically* accomplishing.

Keep this list handy as you create touch point plans for your qualified donors.

“**Sample Donor Touch Points**”

By Chad Barger for Productive Fundraising

https://productivefundraising.com/wp-content/uploads/2018/11/Sample-Donor-Touch-Points.pdf

Here are some creative ways that you can reach out to your donors to keep in touch, express gratitude and stay top of mind:

• Staff update calls (donors that receive an update call from a staff member a few months after their donation give 41% more (on average) the next time they give)

• Unique impact postcard

• One question email survey (e.g. "What program do you care about the most?")

• Happy Birthday email (not a facebook message, they get tons of those)

• Annual report postcard (not a thick book with an honor roll of donors, 75% of charities no longer do them & donors don't care about them)

• Invitation to (free) events (e.g. thank you reception)

• Invite for a tour or observation opportunity (especially if it’s a behind the scenes tour that isn’t offered to everyone)

• Email impact updates (“Your Support In Action” – send one story at a time, change the newsletter format, your donors don’t have time to read it)

• Personal thank you video (with impact happening in the background - recorded on your phone & most effectively delivered via text message)

• Send another hand written note (they can never receive too many)

• Get your executive director or board chair to say "thank you" (via hand written note / phone call / video / etc.)

• On #GivingTuesday reach out to say “thank you” instead of asking like every other charity in town

• An invitation to an intimate event in a board member’s home with the organization’s top staffers

• A thank you letter written by a recipient of your organization's work (a scan is fine, perhaps with a “Thought you might like to see this …” scrawled on the top)

• Artwork produced by recipients of your services (especially kids)

• An invitation to an educational opportunity (like a speaker) that matches your mission

• A quick (personal … not mass) email with a link to a news feature on the organization ("As one of our most loyal supporters, we thought you might like to see this …")

• Offering the use of the organization's office / event space (if you have it) for free or at a discount

• Public recognition for their support (assuming they want it)

• Invite them to a town hall conference call with the CEO & senior staff about upcoming organizational initiatives

• Offer to profile them and their reasons for supporting the organization in your newsletter or on your website

• Mail an actual printed glossy photo with a post-it note saying ("I thought you might like to see what you made happen last week …")

• For event sponsors, a photo book with some shots from the event (including a few of them and their guests enjoying it – these are prized gifts that are often displayed in company lobbies for years)

• Let a different voice say thank you (if it's someone fictional, like a mascot that's even better)

• And the one that will have the most impact of all … reach out and schedule update visit ("I'd love to stop by for 20 minutes and share some recent successes that your support has made possible.")

And here's a few things that you shouldn't do:

• Don't send a tchotchtke, freebie, thank you gift (or whatever you want to call it) – it lowers their next donation by 46%

• Don't send a picture of you accepting or giving a jumbo check (it's not about the money, it's about the impact)

• Don't ask for anything … NO THASKING … I can't repeat this enough (even soft asks placing contribution envelopes in newsletters or asking them to volunteer can sometimes mess up this entire process)

"Top 10 Ways to Say 'Thank You!' to Nonprofit Donors"

By Claire Axelrad for Bloomerang

https://bloomerang.co/blog/top-10-ways-to-keep-nonprofit-donors/

RESOLVE to rock the power of thank you!

Begin by making donor retention a priority. By now you probably know data from the Fundraising Effectiveness Project (FEP) shows the average nonprofit in the U.S. loses over 80% of donors after the first gift!

It's not because donors aren't generous to you. It's because you're not generous to them!

Why else would folks dig into their pockets to make new gifts year after year, only to stop giving to those nonprofits in droves the following year?

When donors don't feel your love and gratitude, they're unlikely to send reciprocal love and gratitude your way. All successful fundraising is based on a value-for-value exchange – you've got to offer donors something they'll want to reciprocate.

The simplest thing you can offer is expressed with the power of just two words: **THANK. YOU.**

Leverage the power of the "3 P's"

When Penelope Burk's groundbreaking Donor-Centered Fundraising research first came out two decades ago (it's been repeated numerous times since), I was bowled over by the primary finding that **if nonprofits did just three things donors would likely give again**. Or give more. What was this holy trinity?

The 'holy trinity' of successful donor retention (I call them "3 P's"):

1. ***PROMPT*** **thank you.**
2. ***PERSONAL*** **thank you.**
3. ***POWERFUL*** **demonstration of gift's impact.**

The more you incorporate this trinity into your ongoing donor acknowledgement, recognition and communications program, the greater success you'll have in retaining and upgrading donors.
A 'gratitude program' is more than simply saying "thank you" once and then ignoring the donor until your next appeal. You need a thoughtful written plan with a cycle of communications that:

- **Engage donors without an ask**,
- **Express authentic gratitude**, and
- **Show donors how they made a difference**.

Top 10 Ways to Say 'Thank You!' to Nonprofit Donors

1. Mail

The gold standard is a prompt and personal mailed thank you *letter*. Not a canned receipt. Something you take time with, stopping for a minute to think about your donor's individual contribution. They took time to earn the money they gave you; it's the least you can do to return the favor. Next time you think of the old adage "*time is money*," think about spending some time to craft a thank you that will be appreciated. That's how you'll get more money in the future.

TIP: Add a personal handwritten note. This elevates the thank you from "canned" to special. It's why I advocate mailing a thank you *letter* to donors who give online, in addition to the immediate email receipt.

2. Email

This is what you send immediately when donors give online. But don't use the canned acknowledgement provided by your CRM or email provider. Donors can tell when something is automated, and they'll perceive it as "I guess they don't really care about me."

TIP: Attach a brief video or a photo showing how their gift will be used. Let them know they'll receive their 'official' thank you later in the mail. Don't treat online donors as second class citizens. If offline donors get a personal note, welcome package, and maybe a token gift, make sure your online donors get the same relationship-building touches. Yes, it's easier and less expensive to forego the mailed letter in the short run. In the long run, you'll likely retain more donors if you send both types of acknowledgements. If you're doubtful, test this.

3. Phone Call

This is your secret weapon, perhaps the most under-utilized ways of thanking donors, and probably the method that has the *most* lasting impact. If you do it, you'll really stand out. In a good way. Do this *in addition* to sending a letter before or after the call.

If you're a doubter, allow me to clue you in to a famous experiment by Penelope Burk, author of Donor-Centered Fundraising. In a test with board members calling to thank donors within 48 hours, those called gave an average of 39% more than those not called – and 42% more even after 14 months! Calls have a real lasting value. A subsequent study by Chuck Longfield at Blackbaud reconfirmed these findings. Even leaving a voicemail helps, though not as much; do try to reach your donor in person at least twice.

TIP: Learn: (1) Who to call; (2) Who should make the call; (3) When to call; (4) How to call; (5) What to say, and (6) Next steps by heading over to Clairification and grabbing my free "Donor Thank You Calls E-Book + Script."

TIP: Ask donors for their phone numbers on your response devices and donation pages, and use them! Bloomerang conducted an experiment to see how 50 randomly selected nonprofits would respond to their first-time gifts. Only 38% asked for a phone number, effectively ruling out communicating easily and quickly through calls or texts. None called to say thank you.

4. Video
Anyone with a smart phone, or even Zoom, can create a perfectly serviceable thank you video – one that is warm and genuine. It can be as simple as pushing "record" and talking while looking into the camera. Watch this little video of me telling you how to send a pre-recorded video to your supporters via Zoom.

TIP: Take photos of staff or program recipients holding thank you signs; then use a free app (e.g., Canva, Animoto, Vimeo) to edit them into a quick slideshow. You can even add music. Just make sure your video is brief (probably under 30 seconds). It's not a sales piece. It's a pure appreciation piece.

5. Donation Thank You Landing Page
Your thank you landing page is a valuable, too-often overlooked piece of real estate. Most organizations simply put cursory thank you language there, and may even use canned language from their email service or CRM provider. This is like having a piece of Monopoly property, but never building a house or hotel on it. It's fine, but won't help you win the game.

TIP: Include a compelling image or brief video that tells a story demonstrating the impact of your donor's gift. Like any other thank you, this landing page should be considered an opportunity to predispose your donor to make a next gift. But don't sell; show and tell. And make sure it's optimized for mobile or your donor may miss it!

6. Social Media
This is a great way to keep gratitude flowing throughout the year, and it's relatively inexpensive. Simply send high fives to your donors using the channels they most frequent (which, of course, you can ascertain by *asking* them using a survey or response device).

TIP: Sprinkle "because of you" throughout your messaging. Include a link to a video, photo or graphic that makes your donor feel good about those being helped – *because* of their support.

7. Text
Some people, especially younger donors, communicate primarily through text. These folks may actually prefer a text thank you over an emailed one (which may take them a week to open).

TIP: Consider your audience in crafting your thank you strategy. Texting may be a viable primary or secondary strategy, especially if you'll otherwise have difficulty getting out a thank you within 48 hours. There are programs to help you (e.g. Rally Corp and thankview).

8. E-Newsletter or Blog
The whole point of these communications is to provide an easy, regular opportunity to make your donors feel good. Don't miss the chance to sprinkle one or more thank you's and pats on the back to your donors every time you send one out. Donors are the heart of your mission and make your work possible. Give credit where it's due. Every time.

TIP: In addition to thanking donors in general, consider thanking specific donors. Praise grows in a public setting, and this can be a nice relationship-building touch for those to whom you're particularly grateful. And don't just thank major donors this way. Try thanking the kid who saved up all their pennies or held a bake sale. This can get an entire family to hang in with you for the long-term, plus it also inspires copycats.

9. Annual Report
An annual report is a terrible thing to waste. Even if you don't include a donor honor roll because you've decided it's too resource-intensive, you can still acknowledge you'd have nothing to report on without donor support.

TIP: Thank donors in the letter from the E.D. or board president, rather than simply talking about how "we did this" and "our organization accomplished that." Make it about the donors. Also sprinkle thank you's throughout the body of your report copy. When you report on a program, conclude with "*this was only possible with the support of our corporate partners, foundation friends, and individual supporters*."

10. Event Program
Whenever you gather a crowd in person (virtual, too) recognize donors who make your work possible. Don't just include donor names in the printed program; do it from the podium or stage!

TIP: Consider adding special recognition touches (e.g., distribute logo pins; hold a virtual after-party donor thank you event; send screenshots of the event; send a video thank you of students, beneficiaries, or staff singing a special song or reading a poem in tribute to donors, etc.).
Go the extra mile when thanking donors!
Think of it as giving donors a little "tip" for service well performed.

When we're loved, we're likely to return the favor.
When you love again and again, you'll receive gifts again and again. It's that simple.