

2018-19 Project Charter

PROJECT NAME:	Development Strategy Plan
PROJECT LEAD:	Louise Gregory
TEAM MEMBERS:	Wendy Hanson, Gigi Gillard, Joe Schillaci, Shanti Corrigan
PROJECT SPONSOR:	Jeff MacKie-Mason

PURPOSE & GOALS

Describe the current challenges and opportunities that the project addresses. What core issue will be addressed by the project? What goals will be achieved by the project? What benefits will the project deliver and which constituencies will receive these benefits?

Our central role is to advance the mission of the University Library by directing strategic initiatives, fundraising, events, communications, programs and outreach efforts that effectively promote financial support, engagement, and a strong, positive image for the Library. We will strive to increase level of interest, involvement, and generosity toward the Library from all key constituencies - alumni, donors, students, faculty, parents, staff, volunteers, corporations, foundations, and friends as well as the community at large.

Achieve the second year goals of the development strategic plan

- Complete plan for the Library fundraising campaign and launch
- Increase annual fund (unrestricted/restricted current use) giving by at least 15%
- Accelerate principal gifts for Center for Connected Learning (\$4.75M new)

ALIGNMENTS WITH STRATEGIC GOALS

Describe how the project aligns with the strategic priorities of the Library.

The Development Strategy Plan project aligns with the Library strategic priority #4 - which is 'Tell our story to build community, cultivate relationships, and attract financial support.

2018-19 PROJECT SCOPE

(Describe the scope of the project during FY 2018-19. The scope defines the boundaries where the project begins and ends. The scope describes what will be delivered including where, when, and how. It describes the services, functions, systems, solutions, or tangible products to be created during the course of the project, as well as the business process impacts.

Library Fund Defined

The Library Fund is the cornerstone of the Library's annual fundraising program. This annual fund not only provides a steady source of unrestricted annual support, but it also lays the foundation and cultivates donors for future major, capital, and endowment gifts, as well as for legacy gifts through the donors' will or living trust. Many of the Library's major gift donors and Board members initially supported the Library through our annual fund program. The annual fund is designed to help foster and establish an ongoing culture of support of the Library that is donor-centric and relationship based.

The Annual Fund is comprised of direct mail appeals and personal solicitation; in both renewal, and acquisition efforts. Gifts to the Library Fund represent unrestricted giving at every giving level.

Goal of the Library Fund (annual fund)

The Library Fund annual giving program provides annual support made to the University Library to help meet current priority needs in many areas, such as digitizing our collections, acquiring new materials, and supporting services and programs. Gifts are unrestricted and are used at the discretion of the University Librarian.

Goals for 2018-2019

Raise \$1,150,000 for the Library Fund to include:

- Raise \$120,000 for the Library Fund from Library Board members
- Raise \$65,000 for the Library Fund via the campus' Big Give Campaign
- Raise \$8,000 for the Library Fund via personal solicitation efforts from the Library Board's Annual Fund Committee
- Raise \$18,000 for the Library Fund through personal solicitation notes from the Library Board members

2018-19 PROJECT DELIVERABLES

(List what will be when it will be delivered, and describe what success look like for the project.)

Deliverables	Date	Measure of success
LDO team goal of \$14M	6/30/2019	Money raised
Each MGO goal \$1.5M	6/30/2019	Money raised
Raise \$4.7M in current use funding	6/30/2019	Money raised
Raise \$4.75M for CCL	6/30/2019	Money raised
Establish the plan and timeline for Library Campaign	6/30/2019	See fundraising goal above
Complete LDO calendar of activities	6/30/2019	Steward over 2500 donors including annual Luncheon in the Library and Library Legacy event, and mail to 22,000 database through communications
Partner with LCO on fundraising communications	6/30/2019	3 Fiat Lux and Annual Report, 4 direct response campaigns, 4 email response campaigns
Library Board engagement	6/30/2019	100% annual fund participation, 10 campaign asks, and 14 board or committee meetings
Activate regional engagement	6/30/2019	Minimum of one event in NY and Southern California