

# Momentum:

*Advancing a Learning Community*

Advocacy



Assets



Assurance



# PREAMBLE

For many years, the Public Library in Indianapolis benefited from a gift fund that consisted primarily of memorial gifts and special donations used for the purchase of books and other library materials. When Harold Sander became Director of Public Libraries for Indianapolis in 1956, he brought with him the hope of establishing a foundation to encourage gifts, bequests and endowments to the Library. It was not until the Indianapolis-Marion County Public Library (the Library) was established in 1968, following the separation of the Library as an entity of the Indianapolis Board of School Commissioners, that Mr. Sander could proceed with his plan to establish a library foundation. Following a period of planning and organization, the Indianapolis-Marion County Public Library Foundation (the Library Foundation) was officially established on February 25, 1969, as a nonprofit organization. Contributions to the Library Foundation now fund between 70-80 percent of Library programs each year, as well as other Library services, such as collections, professional development, staff and volunteer recognition and marketing.

In early 2009, the Library Foundation developed a strategic plan, "Advance," with Advocacy, Resources and Stewardship as its three goals. As a comprehensive strategic plan, it delineated the Library Foundation's aspirations, goals, strategic actions, resource-development trajectory and implementation process through 2014. The successful implementation of this strategic plan has positioned the Library Foundation with advanced strengths and assets to better support the programs of the Library. Most notably, its strengths today are found in Board leadership; excellent staff management and stewardship at all levels; diverse revenue streams and a strong asset base; a solid partnership with the Library; and visibility as a trusted entity serving the community. Moving forward, the Library Foundation acknowledges that it needs to renew strategic efforts to expand its base of donors, Friends of the Library and volunteers. It also recognizes that more efforts need to be focused on informing the public more pervasively about the impact of the Library in the life of the community. Further, the strength of the economy vis-à-vis the need for enlarging the donor support base will continue to be a contextual challenge for the Library Foundation in its quest for advancing its assets.

Since the Library Foundation's primary mission is to support the Library's programs, services and facilities, the Library's goals and priorities play a central role in the actions of the Library Foundation. In May 2014, the Library adopted its new 2015-2020 strategic plan with goals to enrich Indianapolis' desire for personal growth and learning, strengthen Indianapolis neighborhoods and businesses, act as agents of innovation in the Indianapolis community, and maximize accessibility to the Library and its services. The Library's strategic plan has set the stage for a renewed opportunity for the Library Foundation to develop a concurrent strategic plan for the next five years.

Resulting from a participatory, deliberate, constructive, creative and consensus-building process, the Library Foundation has now codified its new 2015-2020 strategic plan, "**Momentum: Advancing a Learning Community,**" to strategically heighten the achievement of its goals – **Advocacy, Assets and Assurance**. This plan builds upon the Library's new strategic vision, goals and priorities to enable the Library Foundation to provide the resources and assistance the Library needs to advance its programs, services and facilities. With invigorated purpose, goals and strategies, the Board of Directors and the staff of the Library Foundation look forward to implementing the 2015-2020 strategic plan and supporting the Library in its vision to be a center of knowledge, community life and innovation for Indianapolis.

# ORGANIZATIONAL VALUES AND PROMISE

## Values

Communication  
Growth  
Honesty/Integrity  
Quality  
Teamwork

## Promise

The Indianapolis Public Library Foundation is “more than you imagine.”

We give our board, donors and volunteers rewarding philanthropic experiences that are more than they imagine.

We empower employees to grow and take on new challenges, so that they may become more than they imagine.

We help our colleagues at The Indianapolis Public Library build programs, services and facilities that are more than our patrons imagine.

By enriching Indianapolis residents' lives through diverse, high-quality lifelong learning opportunities, we create a community that is stronger than anyone imagines.

Continually exceeding our stakeholders' expectations won't be easy. As the community's aspirations for the public library increase, we will need to grow our base of donors and increase their engagement – not just to meet the Library's financial needs, but to sustain the Foundation's expanded operations. Our success lies in our commitment to quality, growth, communication, honesty and integrity and teamwork.

# MISSION

## *Advancement*

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Promote patronage and secure support for the advancement of programs, services and facilities of The Indianapolis Public Library to benefit a diverse learning community.

### **Key Characteristics:**

- Sustained, robust private funding support to complement the Library's public support and meet the ever-evolving needs of Library patrons.
- Widely acclaimed Library programs, services and facilities with demonstrable and growing community impact.
- Excellent public accountability and transparency that help build public trust, confidence and sustained public satisfaction.

# VISION

## *Momentum*

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Achieve exemplary momentum of lasting support – as an esteemed advocacy and fundraising organization that assures outstanding stewardship of assets dedicated to the success of The Indianapolis Public Library.

### **Key Characteristics:**

- Resounding positive public opinion toward the Library Foundation and the Library, signifying success of **advocacy** in growing community support for the Library's mission to enrich lives and build communities through lifelong learning.
- Increasing success in achieving vigorous fundraising goals and favorable return on investments to grow the Library Foundation **assets** in support of the Library's goals and strategic priorities.
- Recognition for a sustained business model, with **assurance** of effective and efficient leadership by a Board of Directors representing varied backgrounds and skills, and supported by superlative staff quality with growing experience and dedication.
- Acclaimed leadership among peers as a progressive and innovative Foundation in the community.

# PLAN CONCEPT

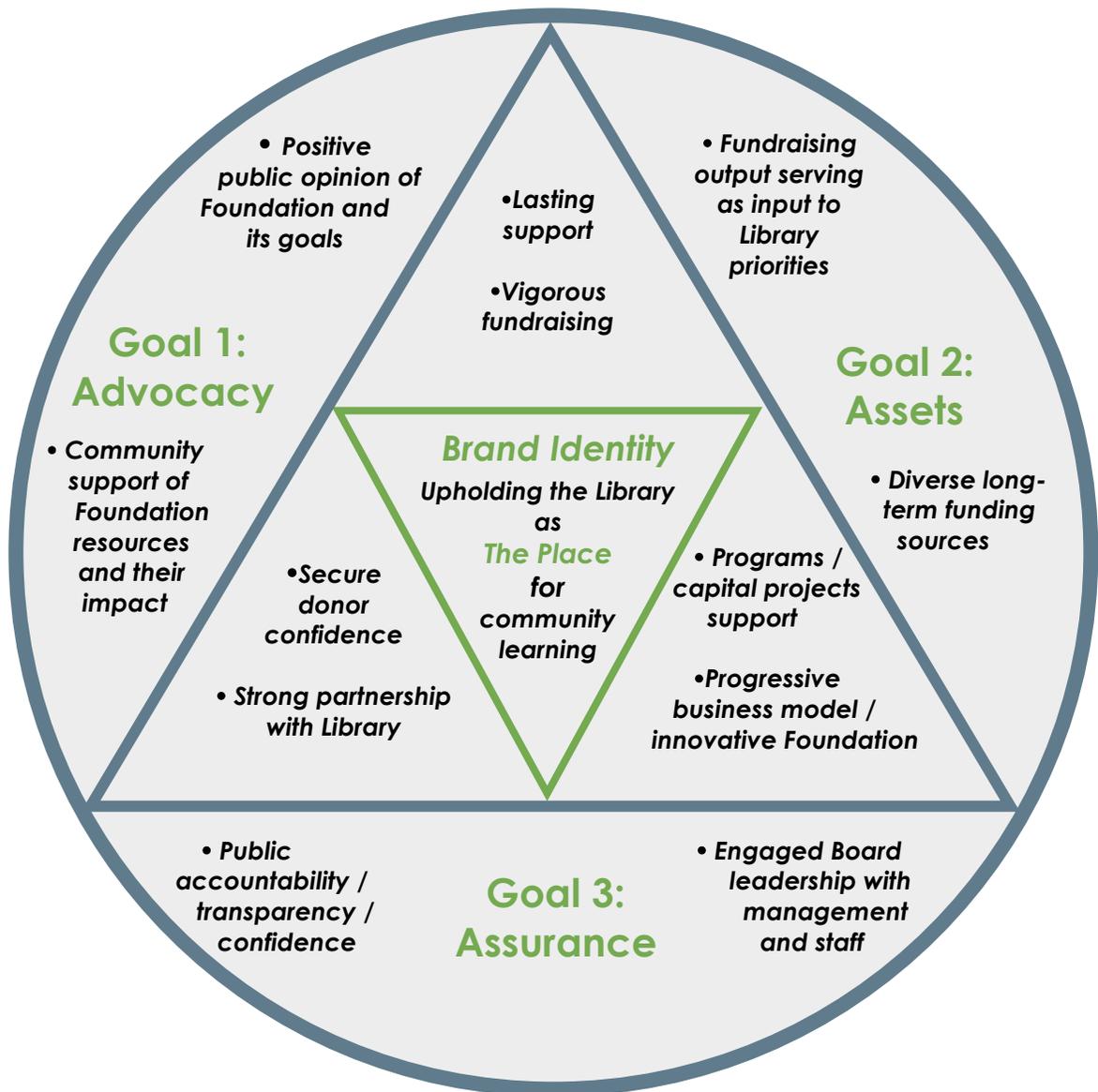
## Momentum

### Advancing a Learning Community

Advocacy

Assets

Assurance



# GOALS

## Goal 1: Advocacy

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Advocate the Library's impact on the community and the importance of public and private support for the Library's programs, services and facilities.

### Key Characteristics:

- Strong community ownership of the important role of the Library in reaching out to diverse learning populations and in addressing key educational needs.
- Pervasive understanding and public acceptance of the vital role and impact of the Library Foundation in promoting, supporting and advancing the Library's strategic priorities, including a clear distinction of this role from that of the Library.
- Favorable and widespread community understanding and commitment toward supporting the Library's fiscal needs with public funds as its core support and private funds as enhancement support.

### Key Strategies:

- Strengthen the image and awareness of the Library Foundation's **brand** through marketing efforts and related messaging to show its important role in supporting the Library's programs and services.
- Promote public understanding of how the Library Foundation financially supports programs of the Library that advance education and workforce development in Indianapolis, including early learning experiences, community learning programs and job and career resources.
- Strengthen existing and create new relationships with Library users, donors, business leaders and other community stakeholders to secure lasting support for Library programs and services.
- Promote the Library's relevance as **the place** for community gatherings, civic engagement and public issues access.
- Explore a marketing strategy that showcases library professionals who can open windows to the world of information and ideas.
- Enhance community understanding of the need for continual upkeep of Library facilities and planned branch expansion or relocation based on geographical/sociological needs and gaps.
- Conduct market research and donor outreach that serves as the basis for lasting support of the Library Foundation's mission and Library services.

## **Key Metrics:**

- Survey Library patrons and supporters to assess:
  - Public perception of brand identity and quality of programs/services
  - Public understanding of Library financing
  - Public understanding of the role of the Foundation
  - Measurement of image with potential donors
  - Measurement of image with existing donors
- Number of Foundation-leveraged partnerships
- Donor retention rates
- Number of corporate donors
- Number of corporate gifts
- Library use
  - Number of on-site users
  - Number of social media followers
  - Number of website hits/online users

## Goal 2: Assets

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Secure assets to grow and sustain the Library Foundation and support the Library in creating a variety of learning initiatives in the community.

### Key Characteristics:

- Sustained development of human, financial and organizational resources as assets to meet the expectations of the Library's strategic goals, priorities and key investment areas for a greater breadth and depth of programs and services with appropriate facilities.
- A talented, experienced, diverse and community-invested Board of Directors and superlative management team who cultivate key community relationships to promote the continued development of public and private resources.
- Increasing funding support from the Library Foundation, leveraged by the core public support for the Library that can be strengthened and sustained over time.
- An expanded spread of the Friends of the Library, Legacy Society members, volunteers and a growing donor base for private funds with widespread donor loyalty and satisfaction.
- Successful private fundraising aided by the development of innovative and creative methods for realizing aggressive goals with favorable return on investments in support of the implementation of the Library's strategic plan priorities.
- Strong partnerships with funding agencies, complementary community organizations and other businesses to acquire resources for the Library's programs, services and facilities.

### Key Strategies:

- Maintain and grow sustainable, diversified funding base for Library services on which the public has come to rely, including electronic resources, early childhood literacy services, cultural and community programs, reading programs, computer classes, etc.
- Continue to cultivate the Eugene & Marilyn Glick Indiana Authors Award so as to "develop a community of readers," while shoring up support for Library Foundation operations and programs.
- Partner with Library staff to connect with constituents served by Library Foundation-funded programs in order to grow Friends of the Library.
- Raise funds to support the Library's contributions to Indiana and Indianapolis' upcoming bicentennial programs, including digitization projects, and increase efforts to connect corporate donors to the Library's business development efforts.
- Raise funds for programs and services and in support of capital projects related to strengthening the Indianapolis community.

- Increase the staff professional development fund by soliciting Library staff for annual and planned gifts and optimize the Library Foundation's human resources, including board and staff members, through recruitment and engagement.
- Raise funds and in-kind gifts for programs related to innovation, with special attention to opportunities from the local tech sector. Cultivate these donors by inviting them to offer training to Library staff.

### **Key Metrics:**

- Level met for funding requests of Library
- Private funds raised – annual goals
- Number and type of donors
- Donor loyalty and satisfaction
- Number of new donors
- Number of new Friends
- Results of connections made – number and success stories
- Net assets

## Goal 3: Assurance

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Assure superior stewardship of assets with efficiency, effectiveness and transparency to stakeholders in responsive support of the strategic needs of the Library.

### Key Characteristics:

- A strong investment philosophy that assures and demonstrates prudent approaches toward the acquisition, development and use of donor funds.
- Transparency and accountability regarding the utilization and stewardship of Library Foundation funds, assuring public confidence.
- Effective communication conveying and celebrating the impact of donors' gifts on programs, services and facilities of the Library.
- Demonstration of strong collaborative stewardship between the Library Foundation and the Library.
- Lasting evidence of ethical values and integrity in the operational culture of the Library Foundation, enhancing donor and public satisfaction with pride in the Library Foundation and the Library as a leader of Indianapolis' learning community.

### Key Strategies:

- Enhance donor confidence by strengthening donor relations, communications, demonstration of program impact and appropriate donor involvement in the Library's initiatives.
- Demonstrate public accountability through financial disclosures, reports, audits and self-examinations for continuous improvement.
- Align resource allocations and reallocations with the strategic plan priorities of the Library Foundation and the Library, driven by assessment of programs, services and facilities development and outcomes.
- Ensure Board of Directors' oversight to maintain the highest standards of integrity throughout the organization.
- Employ and adjust investment strategies to optimize the returns of donor funds for effective utilization and impact.
- Conduct or facilitate regular education and training initiatives to enhance the knowledge, experience and skills of Board members and staff.
- Attend to staff development, support, integrity, work ethic and a positive and constructive work environment.

## **Key Metrics:**

- Assessment of number and type of funded programs aligned with Library priorities
  - Number of people served
  - Cost per person served
  - How well people were served
  - Diversity of people served
  - Match of program provided versus need
- Annual/periodic reports made to the Board of Directors and the stakeholders
  - Alignment of expenditures with donor intent
  - Published annual report
  - Annual audit
- Return on investments in comparison to appropriate benchmarks
- Evaluation of staff performance, development opportunities and collective office-productivity

# BENCHMARKS AND PEERS

The Library Foundation will assess its success with this strategic plan using the metrics identified with each goal, and a number of benchmarks for comparison with a set of selected peer organizations. These peers were selected based on their mission commonality, success characteristics, reputation and the best practices they employ.

## Benchmark Measures

### Input Measures

- Annual revenues and expenditures
- Number of staff and competitiveness of staff compensation
- Promotion of the Library's relevance as the place for community learning
- Market research and donor outreach

### Throughput Measures

- Donor retention rates
- Alignment of expenditures with donor intent
- Number of [new and total] donors/Friends of the Library
- Number of Foundation-leveraged partnerships
- Productivity measures – staff performance and development; cost of fundraising

### Output Measures

- Private funds raised – annual goals
- Level met for funding requests of Library
- Assessment of number and type of funded programs aligned with Library priorities
- Assessment of public perception – brand identity, Library financing and role of the Foundation and image with donors – donor confidence, loyalty, satisfaction
- Return on investment
- Net assets

## Peers

Six local peers and three national peers were initially identified for benchmark comparisons as follows:

### Local Peers

- Indianapolis Parks Foundation
- Indianapolis Symphony Orchestra
- Indianapolis Zoo
- Little Red Door Cancer Agency
- MSD of Lawrence Township Foundation
- Riley Children's Foundation

### National Peers

- Columbus Library Foundation, Columbus, Ohio
- Madison Public Library Foundation, Madison, Wisconsin
- Louisville Free Public Library Foundation, Louisville, Kentucky

# KEY PRIORITIES AND INVESTMENT AREAS

Achieving the Library Foundation's strategic plan, "**Momentum: Advancing a Learning Community**," its role and effectiveness in support of the Library's strategic priorities will require the setting of key priorities and investment of resources in targeted areas. Revenues from various funding sources will be utilized to achieve the goals of the Library Foundation's strategic plan. Many of the strategies described in this plan will be undertaken using existing resources. However, several key priorities will require new, redeployed or increased investments. These key priorities are summarized as follows:

## Key Priorities

- Strong partnership with the Library – fundraising outputs serving as input to the Library's priorities
  - Alignment of resource allocation with strategic plan priorities of the Library Foundation and the Library
  - Increased support for Library programming and capital projects
- Brand identity of the Library Foundation and upholding the Library as The Place for community learning
  - Increased awareness of the Library and Library Foundation and their relevance in the community
  - Positive public opinion of the Library Foundation and its goals
  - Community understanding of the Library Foundation's impact
  - Accountability, transparency, confidence and trust
- Vigorous fundraising
  - Lasting support – sustained donor base and loyalty
  - Diverse long-term funding sources
  - Engaged, confident donor base
  - Donor acquisition
- Progressive business model/innovative Library Foundation
  - Investment strategies that optimize return on investment
  - Education and training initiatives that enhance knowledge, experience and skills of Board members, management and staff
  - Oversight for achieving effectiveness and efficiency in operational culture with the highest standards of integrity – with special attention to strong stewardship of donor funds
  - Engaged Board leadership with management and staff

The Board, management and staff will craft a budget aligned with these priority areas. This budget will form the basis of the Library Foundation's strategic plan implementation.

## New Key Investments

In addition to expanding the Library Foundation's current level of support for the Library, three strategic areas have been identified in which to further invest the Library Foundation's resources:

- In 2016, the Library Foundation will increase its support of Library programs by 14 percent to approximately \$2.4 million dollars annually.
- The Library Foundation will embark on a two-year information campaign to spread awareness about the relevance and role of the Library in the 21<sup>st</sup> century.
- A key goal of the Library's new strategic plan is to "maximize accessibility to the Library and its services." To do this, the Library will be building, expanding or relocating many branches. The Library has determined it can use bonds to fund most of these building projects. However, the Library Foundation will assist with funding capital projects as the need and opportunity arise.

## IMPLEMENTATION

Implementation of this strategic plan will begin upon approval by the Library Foundation's Board of Directors. The Library Foundation's action plans will be reflected in its annual budget. Each year, the Foundation's staff and Board will craft a budget based on the goals, strategies, priorities, targets and recommendations identified in this plan, as well as funding requests submitted by the Library. The Library's funding requests, or service plans, will be vetted by the Library's senior management to ensure feasibility, institutional support and alignment with the Library's strategic plan. The Library Foundation's staff and Board will review and prioritize the allocation of resources to the various service plans. The Foundation's staff will report quarterly to the Board of Directors on the budget's implementation, as the entire Board will have oversight.

The Library Foundation staff will conduct annual internal progress assessments to document the outcomes related to its strategic plan priorities and will share the results with the Board. These assessments will be based on the metrics and benchmarks identified in the plan. These metrics and benchmarks will be defined for specificity, scope and appropriate timelines and targets to be met. Additionally, the Library will report on the outcomes of the programs and services made possible by the Library Foundation resources, providing donors and the Board of Directors with a comprehensive picture of the plan's success and impact on the community.

With this strategic plan, "**Momentum: Advancing a Learning Community,**" the Library Foundation has positioned itself as a vital asset in the community to support the Library in its mission to successfully implement its next five-year strategic plan. The Library Foundation looks forward to strengthening and expanding community and donor support dedicated to enhancing the Library's programs and services. The value of this partnership will continue to benefit the community it serves.