

Know When to Hold 'em, Know When to Fold 'em

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Abstract

Forming relationships with donors can lead to many positive and beneficial outcomes for academic libraries. New collections and funds raised help to support institutional priorities and ultimately benefit our faculty and students. However, sometimes these negotiations necessitate that the practitioner walk away, if the donor's interests do not align with the library's. A productive partnership between the practitioner and their development officer becomes key to navigating such situations successfully. This article provides a brief overview of fundraising elements and then presents three case studies that highlight how practitioners can leverage this important partnership in support of their work.

Keywords: Fundraising, negotiation, relationship-building, collaboration

Introduction

I have a secret. Donor relations work is my favorite part of being a library administrator. I love the look on a donor's face when they talk about their collection of public health posters and memorabilia they have amassed or when a donor shares my passion for supporting undergraduate experiential learning opportunities and decide to fund an internship. Fortunately, I have had many of these experiences, first as a manuscripts curator and, more recently, as I moved into library administration. Key to establishing and maintaining strong relationships with donors for me has always included having a productive partnership with my development officer. Over the course of my career working in or managing the work of special collections departments, I have experienced the real benefits that result from that partnership. While we always work towards a positive outcome, a critical part of donor relations work is recognizing the signs of when it is time to bring a negotiation to a close and turn down a gift. Development officers can play key support roles in helping practitioners navigate such situations. Below, I present three mini-case studies that illustrate the signs practitioners can look for as they pursue either financial gifts or collection donations that indicate they may need to walk away.

Establishing the Partnership

When a practitioner starts a job at a new university or when a practitioner's role changes to include donor relations work (collection development or fundraising), I recommend that person reach out to the relevant development officers on their campus. These staff members are responsible for establishing relationships with potential financial supporters and soliciting financial gifts. Oftentimes development officers focus their solicitation efforts on university alumni, key community stakeholders, and foundations. Such staff play a key role in any capital campaign projects as well as smaller annual giving initiatives. Many academic libraries have such staff in house and others rely on a more centralized model, where they are supporting multiple campus units. There are two main activities that I work with development officers on: cultivating financial gifts and considering donations of unique materials, such as archives and rare books. During my first months at a new job, I work with my staff to create a list of top fundraising priorities, which I then share with my boss and our development staff. Knowing our priorities helps the officers to evaluate potential donors who may be interested in supporting such initiatives.

I have been fortunate in my career that each officer with whom I have worked has been cognizant of their own knowledge gaps when it comes to understanding and speaking to special collections and library work. Taking the time to continuously educate these staff about library work pays dividends when these same staff speak to potential donors either with me or on behalf of my unit. During these conversations, development officers help me to best articulate the needs of my unit in ways that donors without a special collections or library background will understand. Those communication skills are vitally important in donor relations work and development officers serve as the bridge for getting those messages out and advancing the work of the library. Though some practitioners may bristle at this joint approach to speaking with donors, I have found the partnership to be incredibly valuable, especially when dealing with a complex situation.

In particular, development officers should be involved in negotiations—certainly all financial conversations—and can also be helpful when practitioners are speaking to donors about potential collection gifts. It has been my practice that after first meeting a potential donor (at an event, receiving a cold call, or being introduced by a colleague), I contact my development officer to discuss potential giving opportunities and to learn any relevant information about that person's history with the university. The librarian's role, experience with donor relations, and the organization's culture will guide who takes the lead when soliciting a potential donor. A general practice is to have the staff member with the most well-established relationship take the lead. Whenever I have been directly involved in a solicitation, I schedule a pre-meeting planning session with my development officer partner in which we discuss what the goals of the conversation are and any deal-breakers. After speaking with the donor, the development officer and I then have a short debrief meeting to go over our impressions and summarize next steps and any potential issues. Depending on other pressing topics, I sometimes will add this preparation or debrief sessions to the standing monthly meeting I have with the development officer. These strategy sessions become particularly important when it becomes apparent that the donor's interests or wishes do not align with the library's.

Professional ethics and other considerations

One of the challenges of maintaining positive and productive relationships with development officers is that we may not always share the same motivations. While both library practitioners and development

officers should have the best interests of the university at heart, other motivations can place them at odds. Practitioners are likely to focus on expanding human knowledge using standards common to the library profession. A development officer seeks to establish and maintain strong relationships with a wide variety of constituents in order to raise funds and thereby the university's prestige. For example, a development officer will include the estimated value of a gift in kind, such as a collection donation, as part of their fundraising figures for the year. By contrast, accepting this collection donation takes resources away from the library as staff time must be dedicated to making the materials available for research, supplies must be bought, and shelf space allocated for storage. When it comes to collection acquisitions what can appear to be a big win for a development officer may very well not be for the library. In addition to considerations around collection gifts, it also behooves the library administration to have clear goals when it comes to financial gifts to help ensure that the unit's priorities and the development officer's advocacy aligns. For example, raising funds for a project in which the library will need to reallocate staff resources from one initiative to work on this new project may or may not be in the organization's best interests.

Mini Case Study #1: Accepting a collection donation

Current and former faculty and staff members can be great champions of library work, and potential collection and/or financial donors. For example, I once worked with a retired theater department secretary, who wanted to digitize a number of photographs in our theater collection. Though this project was not one we could prioritize, we were able to set up a digitization station in the reading room at which the former staff member could scan the photos. Several years into this project, the former staff member asked to donate boxes of slides she had saved from the trash upon her retirement. These slides captured key moments of various productions and documented the history of the theater department over many decades. I discussed this offer with our university archivist and development officer. Being but one collection within the university archives, the archivist decided these slides were out of scope, as the existing collection already contained a representative sample of this history. Though the development officer was interested in seeing what kind of arrangement could be worked out to best preserve the university's relationship with the former staff member, the officer trusted us when we said that such a collection was outside of our scope. This experience underscored the importance of having a publicly facing collection development policy that outlined the formats and topics the repository would and would not accept. That document then provided me and our development officer with talking points when responding to the former staff member. We visited her at her home, which gave her the opportunity to show us the slide collection and talk about her memories of working in the department. That exchange made the donor feel seen and heard, something an email or even a phone call may not have achieved. We made it clear at the end of the visit that while these slides were certainly special, they were outside of our collecting scope and we would not be able to add them. The former staff member seemed satisfied with that answer and we continued to share updates about the theater collection and others in university archives with her in subsequent years.¹

Key take-aways:

- As an administrator, I consider part of my job to be managing the expectations of our donors and our library staff to find a workable solution to a given issue. To do that effectively, I must first

¹ In cases where I am knowledgeable about the collecting scope of another archive, such as one in the general region, I will provide that institution's information to the donor should they wish to place the collection elsewhere.

understand what outcome our staff ideally want. I rely on their expertise, their industry knowledge, and their input to guide me. Similarly, I work with our development officer to uncover the donor's key interests and motivations.

- When turning down a collection donation, it is critically important to be clear about the decision. If the collection might be a potential fit in the future, the practitioner should say that and explain what the timeline would be to revisit the donation. If not, then being explicit when saying no is necessary.
- Depending on who the donor is and who they are connected to or related to on campus or in the community, it is important to make other library administrators, like a dean or library director, and possibly others aware of the situation.
- To save future staff time, practitioners should document these decisions, as sometimes donors will see a "new staff announcement" and offer the same collection to that new person. Having such a document provides context, which helps the new staff member best address the situation.

Mini Case Study #2: Accepting money in support of a specific collecting area

It is good practice when working with a donor interested in gifting collection materials, to ask them for financial support. Ideally, that funding would be used at the administration's discretion. However, often, donors only want the funds to support the materials they have donated. That restriction can make spending the funds difficult. Other donors may place further stipulations on the financial gift that run counter to the university's policies or practices. For example, after receiving a collection of pro-life pamphlets a donor sought to give a financial gift as well. Rather than give the funds directly, the funds passed through a religious foundation that restricted how the annual gift could be spent. Based on the wording in the agreement, I became concerned that by accepting these funds, all our collecting and/or operational activities could be subject to the restrictions. When entering into any negotiation involving donors, it is important to include development officers. The officer asked the donor to consider giving directly to the library and expressed concerns about our not being able to honor the terms of the foundation's agreement, but the donor would not change her mind, nor would the foundation change any of the terms in the agreement. As part of my due diligence, I consulted with both my boss and the General Counsel's Office. I was told that we could not enter into such an agreement. Our development officer smoothed things over with the donor after we had to turn down these funds and ultimately the donor did make an outright gift to the library, though we do not know if the university's relationship with this person has been damaged as a result of the failed negotiation.

Key take-aways:

- It is critically important to read any and all agreements carefully. Library administrators should think carefully about how the terms in the agreement will impact the workings of the affected unit.
- When in doubt, ask a General Counsel's Office staff member to review the agreement and offer suggested changes. Depending on the librarian's role in the organization, they may need to get permission from a library administrator before contacting such a staff member.
- If the funds will negatively affect a library's collection development or other type of work, consider how best to work with your development officer to turn down the gift, while trying to maintain a positive relationship between the university and the donor.

- Be clear with any library staff involved why you are turning down the funds, especially if any of those staff members has a strong relationship with the donor.

Mini Case Study #3: Accepting funds for a new initiative

Being offered funding to launch a new initiative is exciting and likely the result of strong relationship building with one or more donors over time. Because new initiatives often require a reallocation of staff time (if new staff will not be hired), administrators should carefully consider the benefits and drawbacks of pursuing the project. For example, a long-time researcher and collection donor sought to fund a research fellowship focused on a particular collection. I worked closely with the donor, his business manager, and our development officer to draft an agreement. It quickly became clear that the donor had strong feelings about how the creator/subject of the collection had been interpreted by scholars in recent years and sought to use this fellowship as an opportunity to add to the scholarly record. That sentiment gave me pause as it seemed like the donor's interests could run afoul of academic freedom. However, we were able to draft language specifying fellowship recipients would not be restricted in the topics they explored or in the conclusions they drew. Due to the donor's deep, personal connection with the creator/subject of the archive, the donor then asked to be on the fellowship's review committee. While I tried, together with the development officer, to explain why the university and our professional ethics would not allow for the donor to have such a role, it became clear that this was a deal-breaker for the donor. When deciding between challenging university procedures or turning down the funding, I decided to turn it down.

Key take-aways:

- As negotiations for financial gifts continue, administrators must be able to articulate to themselves, their staff, and the development officer what, if any, deal-breakers exist.
- Administrators must consider how their decision to accept funding under certain terms will impact staff time and activities in the future.
- In this case, the development officer and I were able to say that the university would not allow us to honor the donor's request. That amorphous third party may help to preserve the relationship we have with the donor.

Conclusion

It can be very exciting to work with donors to secure a financial or collections gift. Such philanthropy can result in new student learning opportunities and new modes of scholarship. While most of the time, practitioners will find that their needs align with the donor's interests, there may be times when it becomes necessary to walk away from an opportunity. Practitioners should maintain strong relationships with development officers, who can best support them in such situations. These partnerships have tremendous benefits and it behooves practitioners to explore productive ways of working with these staff members to best serve the needs of the library and university.