Taking a Page from the Fundraiser's Book: What Liaison Librarians Can Learn from Major Gift Officers

Rachel A. Starr

Research and Learning Specialist

Dartmouth Libraries

Author Note

Please address all correspondence to: Rachel.A.Starr@dartmouth.edu

Keywords: Donor Relations, Liaison Librarian, Major Gift Officer, Relationship Management

Introduction

If you work as a liaison librarian, you know that relationship-building is key to your success. Chances are, you are already excellent at it. But it takes time and effort to keep track of each of those relationships, and you have lots of other responsibilities. How can you leverage tools from another industry to save time and keep yourself organized?

Before I went to library school, I spent years as a major gift officer at cause-based nonprofits. Meeting my annual fundraising goal depended on my ability to build and strengthen relationships with a portfolio of more than 100 donors with the capacity to make gifts of at least $10,000. It was important to get to know my donors on an individual basis so that I understood what motivated their giving and where their philanthropy fit into their lives. But without good systems, I never could have kept track of which mailing address to use during which months of the year, much less donors' significant life events and professional achievements.

I thought that becoming an academic librarian would relegate those systems to the past. And yet, the longer I work with liaison librarians, the more I realize that repurposing those same systems and habits could be beneficial in a field where relationship-building is considered crucial but is never taught.

Different ends, similar means

In a comprehensive look at the overlap between librarianship and fundraising (specifically grant writing), Yang (2015) asserts that

> relationship-building skills are crucial to nonprofit fundraisers as they cultivate relationships with individual, and corporate donors to engage their support, and financial contributions. These same skills foster academic librarians' outreach efforts to forge relationships with faculty, researchers, and students to support research efforts, build collaborative relationships, and publicize library services (2015, p. 45).

However, relationship-building is not the only similarity Yang sees between the two professions, and she argues that librarians and grant writers both engage in information-gathering, knowing their audience, online research, communication, and evaluating and curating information as well (Yang, 2015). Surprisingly, a 1992 guide to library development published by the American Library Association and targeted to academic library leaders does not explicitly acknowledge that librarians may already have many of the skills they need to become successful fundraisers and instead offers a nuts-and-bolts approach to all kinds of fundraising scenarios (Steele & Elder, 1992). In a 2005 article entitled "Donor Relations for Librarians," Miguel Juarez acknowledges that "many libraries tend to have at least a few individuals with donor relations skills" and describes those individuals as "friendly, inquisitive, and unconventional…. good communicators, networkers, and risk-takers" (Juarez, 2005, p. 38). In this same article, Juarez introduces one of my favorite terms, writing that "at the University of Arizona Library, donor relations, or the concept of 'connection development,' is a highly encouraged endeavor" (Juarez, 2005, p. 39).

Major gift officers and liaison librarians are both connectors: one connects donors to causes they care about, and the other connects patrons to resources and information. Donors want to make a difference in the world, and patrons want to meet their information needs. Major gift officers and librarians are there to help them achieve these goals. In fact, it's surprising to see how similarly the two roles can be described. Liaison librarianship has "the goal of **connecting the university community with the information it needs**, whether that is in the form of selecting books or databases or helping students and faculty learn to use them" (Johnson, 2018 p. 92, emphasis mine), while the Veritus Group–a consulting firm focused on major gift fundraising–suggests that major gift officers tell donors,

> 'My role is to be your partner, **connecting your heart and passion to the work of our mission**. My objective is to understand what drives your giving – what you are interested in – so I can report back in a more meaningful way the difference you are making in those areas' (Perry & Schreifels, 2023, p. 15).

Being in this kind of in-between role affords major gift officers and liaison librarians multiple perspectives at once, which allows them to advocate for their stakeholders (donors or faculty/students) within their organization or library. At the same time, they can advocate for the organization or library's needs with their stakeholders.

In their excellent compilation of practical relationship-building advice for liaison librarians, Peacemaker et al. (2024) acknowledge that

> Building genuine relationships requires persistence. It is a 'long game' taking time, effort, and honest conversations. Some amount of rejection and failure is part of the job. Giving up on a particular approach after trying, troubleshooting, and trying again is a reality (p. 20).

They also note that "rarely are liaison librarians given the red-carpet treatment in the beginning" (p. 12). The same is true for major gift officers, for whom

> it's important to remember to take a step back and be patient. As with any relationship, it will take a good chunk of time for your organization and a prospect to develop trust and get to know each other. And that process shouldn't be rushed, especially if you want to retain that major donor's support far beyond one fundraising ask (*Finding Major Donors*, 2023).

Describing the relationship-building process as a "long game" (Peacemaker et al., 2024, p. 20) and noting that it might take "anywhere from a few months to a couple of years" (*Finding Major Donors*, 2023) suggests that relationships require an up-front investment of time and resources, and that the return on this investment won't be obvious right away. Without immediate, measurable outputs, the time spent on relationship-building might slip lower on a liaison librarian's priority list. What's more, this time investment is difficult to assess when evaluating liaison performance (Murphy & Gibson, 2014; Spackman, 2015; White, 2014).

Liaison librarians struggling with relationship-building can turn to the library literature for strategies, troubleshooting tips, and innovative ideas. Peacemaker et al. (2024) list concrete, actionable steps librarians can take, such as setting database alerts and tracking systems for faculty and departmental news (p. 15) and investing time in getting to know the academic department administrator (p. 11). Others have focused on specific outreach strategies, such as sending "'did you know' email[s]...describing existing services and products underused by faculty" (Woznicki, 2021, p. 86), "participating in events on your campus that aren't about you 'doing library outreach'" (Filgo & Towers, 2021, p. 34), and always being sure to follow through (Díaz & Mandernach, 2017, p. 277). But what if we look beyond librarianship and take lessons from other sectors?

Customer Relationship Management (CRM) systems are common in sales, marketing, and fundraising because they allow users to track numerous data points about their "customers" and generate custom reports to view progress toward goals, change over time, or specific segments of the customer base (among others). Some librarians have suggested adopting a CRM system within academic libraries to track patron interactions (Eldridge et al., 2019; Fouad & Al-Goblan, 2017; Leligdon et al., 2015; Masuchika, 2013; Spackman, 2015). I worked with at least three different CRMs during my fundraising career, and I would have been lost without them. CRMs are a powerful tool when they can be integrated into existing workflows, but they are only as good as the data that's in them. That's why I heard every one of my supervisors say some version of, "If it is not in the system, it did not happen" (Filla & Brown, 2013, p. 100). For a CRM to be useful, librarians would need to update it frequently. Filla & Brown (2013) note that "a relationship management system will add tasks to your workload" (p. 89), although they make a strong case that the benefits outweigh the additional labor (at least for fundraisers).

"Relationship marketing" is another strategy librarians have proposed adopting in academic libraries (Besant & Sharp, 2000; Clark & Bacon, 2018; Leligdon et al., 2015; *Marketing Library and Information Services II*, 2013; Masuchika, 2013). Besant & Sharp (2000) define relationship marketing as "a mutual interest between company and customer. It is not a new concept. In fact, it is as old as the merchant trade itself. It is the demonstration of a deep and abiding regard for the customer" (p. 18), and they argue that libraries are an ideal place to implement relationship marketing. Clark & Bacon (2018) discuss ways that relationship marketing can be applied to academic libraries' use of social media with long-term benefits like future donor loyalty. Masuchika (2013) advocates for keeping the reference desk specifically because it is a "point of sale" (p. 324) and bolsters the library's marketing efforts by building patron loyalty: "even with the stated importance of relationships, CRM and relationship marketing has gained little hold in academic libraries, mainly because librarians do not understand the need for and value of marketing itself" (Leligdon et al., 2015, p. 250).

Tracking meaningful relationship information

Every liaison librarian has had the frustrating experience of reaching out to faculty members only to hear nothing back. Similarly, every major gift officer has tried in vain to contact high-capacity donors who never respond. In their white paper about making meaningful connections with donors, the Veritus Group suggests, "If you've ever been sitting at your desk wondering why your donors don't want to meet with you, it probably comes down to one thing: you don't have anything of value to offer them" (Perry & Schreifels, 2020, p. 3). A fundraiser's value proposition is somewhat indirect: they are offering donors the opportunity to make a meaningful impact via their organization's programs. In other words, and at the risk of stating the obvious, fundraisers build relationships with donors to eventually ask them for money. Liaison librarians, on the other hand, build relationships with their stakeholders to offer them services and support. The means are similar, but the ends are very different–and, to my mind, librarians have the easier sell. Even so, "to become seen as a necessary player for academic success, [liaison librarians] must make [themselves] and the value of [their] contributions known by providing excellent research support" (Peacemaker et al., 2024, p. 12).

Demonstrating value is just one piece of the puzzle. Fundraisers and liaison librarians both need to learn how their stakeholders prefer to communicate to meet them where they are. "The important thing to remember here," suggests the Veritus Group, "is that every donor is different. And it's imperative to learn and respect the individual communication preferences of each donor on your caseload" (Perry & Schreifels, 2020, p. 2). Similarly, liaison librarians are encouraged to survey their departments to learn how faculty and students prefer to communicate (Peacemaker et al., 2024, p. 9). Just as every donor is different, every faculty member will have unique, sometimes idiosyncratic, preferences. A one-size-fits-all approach to communication comes across as impersonal (you haven't paid attention to your stakeholders' preferences) and is an ineffective strategy for building strong relationships. Rather, liaison librarians should tap into the Universal Design for Learning skills they already use in their teaching and offer multiple means of engagement (CAST, 2024). If a faculty member never replies to direct emails, they are demonstrating that email isn't the best way to connect with them–not necessarily that they don't want to connect. Like fundraisers who try all conceivable forms of communication to determine a donor's preference, liaison librarians can, and should, communicate through multiple channels at once. That said, once it's clear that a specific faculty member prefers email, in-person meetings, or bumping into each other at department events, the liaison librarian should make a note of that and go out of their way to respect that preference in the future.

Without a CRM in place, *where* does the librarian make a note of that? How does the library keep track of those preferences when staff turnover, rather than restarting relationship-building from ground zero when a new librarian comes on board? As a major gift officer, I made extensive use of a tool from the Veritus Group now referred to as the "Donor Engagement Plan" or DEP (Perry & Schreifels, 2021). While the CRM was an ideal place to record donor interactions that had already taken place, the DEP was useful in planning future outreach and interactions because it was much more flexible and could adapt as plans inevitably changed. My goal was always to minimize the amount of duplicative information between the two systems to easily keep both up-to-date.

Below is the Veritus Group's simplified version of the DEP.

Donor	ID#	Interest	Comm Pref	Goal	Jan	Feb	Mar	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec
Smith	362786	Children	Email	$35,000	Visit	Card	Memo	Book	Ask: China	F/u Ask	Invite to Trip	Internal report	Project Rpt	Donor Trip	Ask China	Book/ Gift/Thx
Perry	872646	Housing	Face/Face	$110,000	Tel Call	Report on India	New Letter	Invite to Event	Tel Call	Birthday	Tel Call	Ask: India	Birthday	Tel Call	Yr. End Ask	Book/ Gift/Thx
Willman	762508	Hunger	Tel	$456,000	Birthday	Annual Report	Audior Rpt	Tel Call	New clipping		Invite to Trip		Invite Meet Paul	Donor Trip	Tax Planning	Book/ Gift/Thx
George	146268	?	Face/Face	$23,000	Tel Call	Tel Call	Interest Inventory	Book	News clipping	Birthday	Tel Call	Anniver sary	Book	Tel Call	Yr. End Ask	Book/ Gift/Thx

Figure 1: Simplified DEP (Perry & Schreifels, 2021, p. 9). Reproduced with permission of Veritus Group LLC.

I believe this framework can be easily adapted for liaison librarians and would serve as a useful relationship management and planning tool. Librarians can create their own "Faculty Engagement Plans" (FEP) using free software like Google Sheets or more sophisticated tools like Airtable that can double as relational databases. The FEP would look like this:

Name	Department(s)	Research Interests	Communication Preference	Tenure Status	Worked with in the past?	Last Meaningful Interaction	Next Step
Smith							
Perry							
Wilman							

Figure 2: Sample FEP

Using controlled vocabularies for many of these fields would allow liaison librarians to easily segment their faculty members as needed (e.g. generating a "send to" list for an upcoming email) and would also allow for custom sorting. Any liaison librarian could personalize this FEP template as they chose, including month-by-month planned touchpoints (as in the DEP), history of partnership with the library, and even different "tiers." I used to assign tiers to donors in my portfolio to prioritize my work (I had a highest-priority "A" tier, a medium-priority "B" tier, and a lower-priority "C" tier), but I could imagine librarians grouping their faculty members by criteria like level of library engagement or recency of hire. These tiers or groups will always be somewhat subjective and arbitrary, but if they make sense to the librarian using the FEP, that's all that matters.

Using a tool like the FEP can help liaison librarians implement other relationship management best practices, like always ensuring there is a next step planned and only tracking information that is useful in reports (Filla & Brown, 2013, p. 93). Making a month-by-month plan for outreach and touchpoints can help librarians manage their time and group similar tasks together. And, importantly, tracking information like communication preference and level of library engagement can make transition planning easier when a librarian leaves, and can enable relationship-building not just with individual librarians but with the library as an institution.

The FEP can also help supervisors assess liaison librarians' performance. As a major gift officer, I often had to distinguish between meaningful interactions with donors and regular outreach. I find the Veritus Group's definition of a meaningful interaction ("connection") helpful: "A meaningful connection is any interaction and communication with the donor that moves the relationship forward. This can happen in any manner including text, LinkedIn, traditional mail, and, yes, in a donor meeting" (Perry & Schreifels, 2020, p. 2). This second sentence is key because it clarifies that in-person donor meetings do not necessarily move the relationship forward more than other touchpoints might. In a field where in-person donor meetings are often tracked as a key performance indicator, major gift officers can feel pressured to fill their schedules with meetings, aiming for quantity rather than quality. I have also been guilty of sending the same mailing to my entire portfolio with nothing but a short, handwritten note at the top to distinguish one from another. Meetings for the sake of meetings and mass mailings don't move individual relationships forward. Using the FEP to track "last meaningful interaction" with each faculty member empowers liaison librarians to determine what counts as "meaningful" in each of their relationships. This type of data, while subjective, provides much more insight into a liaison's relationship-building work than do the traditional, quantitative metrics like number of instruction sessions or number of research consultations each term.

The FEP is a tool meant to help liaison librarians track and communicate the work they are *already doing* and doing quite well. I am not suggesting that librarians change their approach to relationship-building–just that they might benefit from streamlined systems for recording the information they already have. Getting started with a new system is the biggest hurdle, and one that I believe librarians can scale to fit their specific situations. For the liaison with multiple disciplines, a heavy teaching load, and collections responsibilities, filling out a spreadsheet with one line per faculty member will take an unreasonable amount of time. In that case, perhaps the librarian could modify the FEP so that each row represents an entire academic department, and the columns provide information like "strongest library allies" or "last department meeting attended." Alternatively, the librarian could start by only filling in the data for their "A" tier–the faculty members they have existing, productive relationships and who are strong advocates for library services and instruction–and gradually add the relationships that are works in progress. Locating and then recording data about past interactions can also be an unwieldy task. A librarian feeling overwhelmed by that prospect could decide to instead start tracking data as of today. They could even simplify the data-entry process by creating a fillable form that feeds into the FEP (e.g. a Google Form or an Airtable Form). However, a librarian chooses to track their relationships, they should plan to set aside time each week for data entry. As a major gift officer, I used to block time on my calendar every Friday afternoon to catch up with the week. I also created a folder in my inbox called "To Be Entered" so that I did not need to hold all those interactions in my head, and I would often email myself reminders that I could file there until my next data-entry time block.

Borrowing a fundraiser's tricks of the trade does not mean cheapening relationships with faculty or making them more transactional. The genuine human connection that liaison librarians form with their faculty members is one of their greatest assets. Instead, these tools and strategies can make that work easier for liaison librarians behind the scenes, while changing nothing about the connections themselves.

Conclusion

Major gift officers and liaison librarians both depend on their relationship-building skills to succeed in their roles. But major gift officers can dedicate much more of their time to relationship building than liaison librarians can; for them, relationship building *is* the job. At my current institution, liaison librarians balance relationship building with teaching, programming, and collection development and management responsibilities. Relationships are central to all of these, of course, but librarians just don't have the kind of dedicated time for relationship management that fundraisers do. My hope is that, by adopting some of the major gift officer's tricks of the trade, liaison librarians can streamline their relationship management (or "connection development") strategies and relieve some of the pressure on their time.

References

Besant, L. X., & Sharp, D. (2000). Upsize this!: libraries need relationship marketing. *Information Outlook*, *4*(3), 17–22.

CAST. (2024). *Universal Design for Learning Guidelines version 3.0*. CAST. https://udlguidelines.cast.org

Clark, M. N., & Bacon, S. D. (2018). Utilising social media to improve relationship quality: The case of the university library. *International Journal of Electronic Customer Relationship Management*, *11*(4), 384–410. https://doi.org/10.1504/IJECRM.2018.096247

Díaz, J. O., & Mandernach, M. A. (2017). Relationship building one step at a time: Case studies of successful faculty-librarian partnerships. *Portal: Libraries and the Academy*, *17*(2), 273–282. https://doi.org/10.1353/pla.2017.0016

Eldridge, J., Fraser, K., Simmonds, T., & Smyth, N. (2019). Strategic engagement: New models of relationship management for academic librarians. In H. Fallon & G. Walton (Eds.), *Librarian as Communicator*. Routledge.

Filgo, E. H., & Towers, S. (2021). *Liaison engagement success: A practical guide for librarians*. Rowman & Littlefield.

Filla, J. J., & Brown, H. E. (2013). Donor relationship management. In *Prospect Research for Fundraisers: The Essential Handbook* (1st ed., pp. 85–116). Wiley. https://doi.org/10.1002/9781118707364

Finding major donors: How to identify & secure major gifts. (2023, December 4). Donorly. https://donorly.com/thedonorlyblog/major-donors

Fouad, N., & Al-Goblan, N. (2017). Using customer relationship management systems at university libraries: A comparative study between Saudi Arabia and Egypt. *International Federation of Library Associations and Institutions*, *43*(2), 158–170. https://doi.org/10.1177/0340035216685103

Johnson, A. M. (2018). Connections, conversations, and visibility. *Reference & User Services Quarterly*, *58*(2), 91–102. https://doi.org/10.5860/rusq.58.2.6929

Juarez, M. (2005). Donor relations for librarians. *Art Documentation*, *24*(1), 38–41. https://doi.org/10.1086/adx.24.1.27949349

Leligdon, L., Quinn, T., & Briggs, L. (2015). Strategic CRM: Improving the business of academic libraries. *College & Undergraduate Libraries*, *22*(3–4), 247–260. https://doi.org/10.1080/10691316.2015.1067662

Marketing library and information services II: A global outlook. (2013). De Gruyter Saur. https://doi.org/10.1515/9783110281040

Masuchika, G. (2013). The reference desk, points-of-sale, and the building of loyalty: Applications of customer relationship management techniques to library marketing. *The Reference Librarian*, *54*(4), 320–331. https://doi.org/10.1080/02763877.2013.806236

Murphy, S. A., & Gibson, C. (2014). Programmatic assessment of research services: Informing the evolution of an engaged liaison librarian model. In *Assessing liaison librarians: Documenting impact for positive change* (pp. 17–34). ACRL.

Peacemaker, B., Cheshire, K., Reid, J., Crookendale, C.-M., Arendt, J., Chaparro, S., Glover, J., Rodgers, S., & Carrillo, E. (2024). Relationship building advice for liaison librarians: Putting it into practice and troubleshooting. *Practical Academic Librarianship: The International Journal of the SLA Academic Division*, *14*(1), 4–22.

Perry, R., & Schreifels, J. (2020). *How to create meaningful connections with donors* (p. 25) [White paper]. Veritus Group LLC. https://tinyurl.com/createmeaningfulconnections

Perry, R., & Schreifels, J. (2021). *Creating strategic plans and goals for every major donor* [White paper]. Veritus Group LLC. https://tinyurl.com/strategicplansgoals

Perry, R., & Schreifels, J. (2023). *Three operating principles of major gift fundraising* [White paper]. Veritus Group LLC. https://tinyurl.com/3operatingprinciples

Spackman, A. (2015). *Assessing the ambivalent liaison*. Library Journal. https://www.libraryjournal.com/story/assessing-the-ambivalent-liaison-peer-to-peer-review

Steele, V., & Elder, S. D. (1992). *Becoming a fundraiser: The principles and practice of library development*. American Library Association.

White, G. W. (2014). Professional development of liaison librarians: Fostering skills for the twenty-first century. In D. C. Mack & G. W. White (Eds.), *Assessing liaison librarians: Documenting impact for positive change* (pp. 121–137). Association of College and Research Libraries.

Woznicki, L. M. (2021). Building bridges beyond the library: Outreach activities for liaison librarians. In C. Crichton & R. Canuel (Eds.), *Approaches to liaison librarianship: Innovations in organization and engagement* (pp. 83–98). Association of College and Research Libraries.

Yang, K. F.-J. (2015). From nonprofits to libraries. In D. Lowe-Wincentsen (Ed.), *Skills to make a librarian* (pp. 35–48). Elsevier. https://doi.org/10.1016/B978-0-08-100063-2.00004-1