

(re)Building More Effective Friends Groups

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EveryLibrary Institute



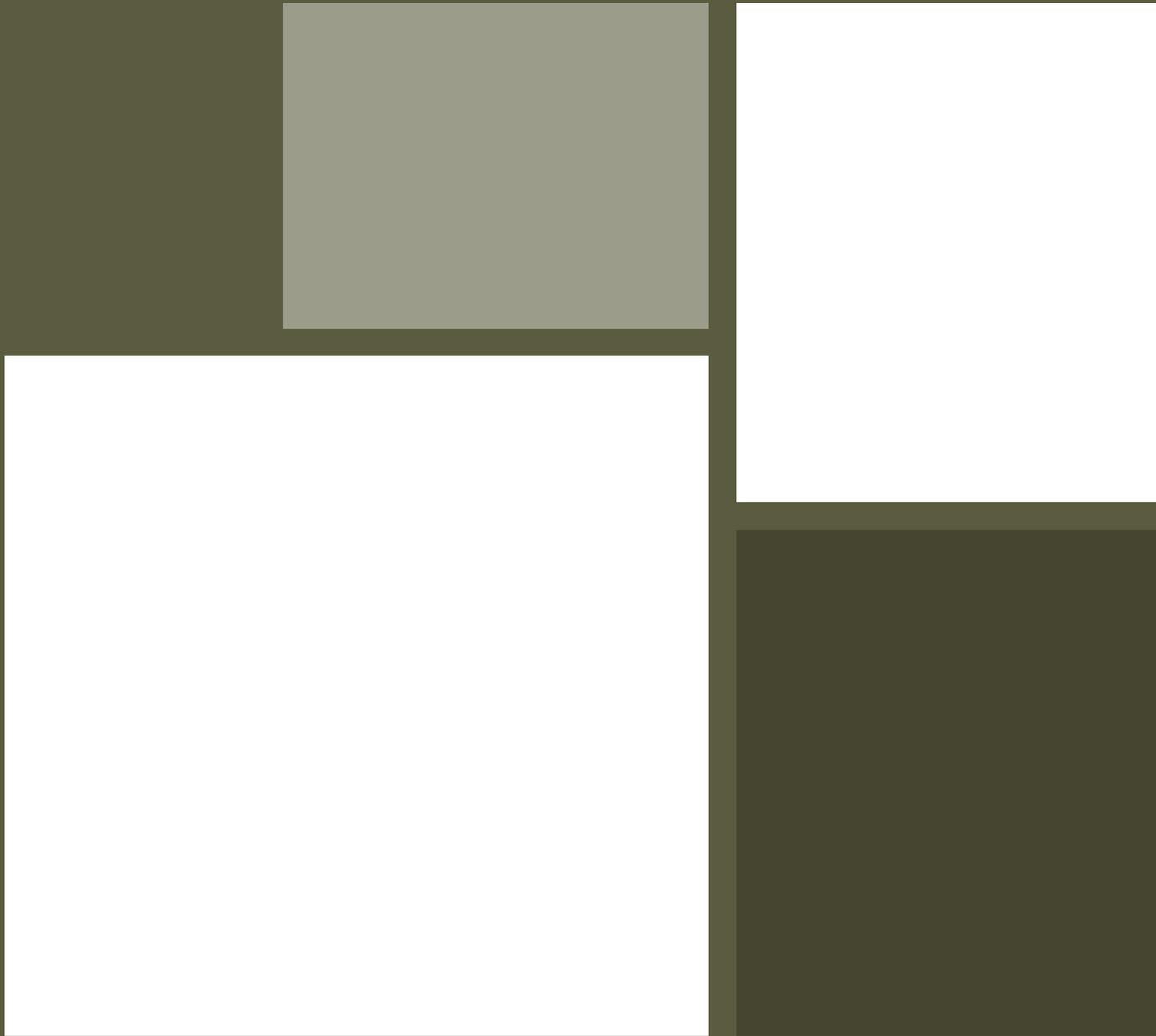
EveryLibrary | 501(c)4 Political Action Committee

- Election Days and Negotiations
- Support for Legislative Agendas
- Outreach and Activism to the Public



EveryLibrary Institute - 501(c)3 Research and Policy Think Tank

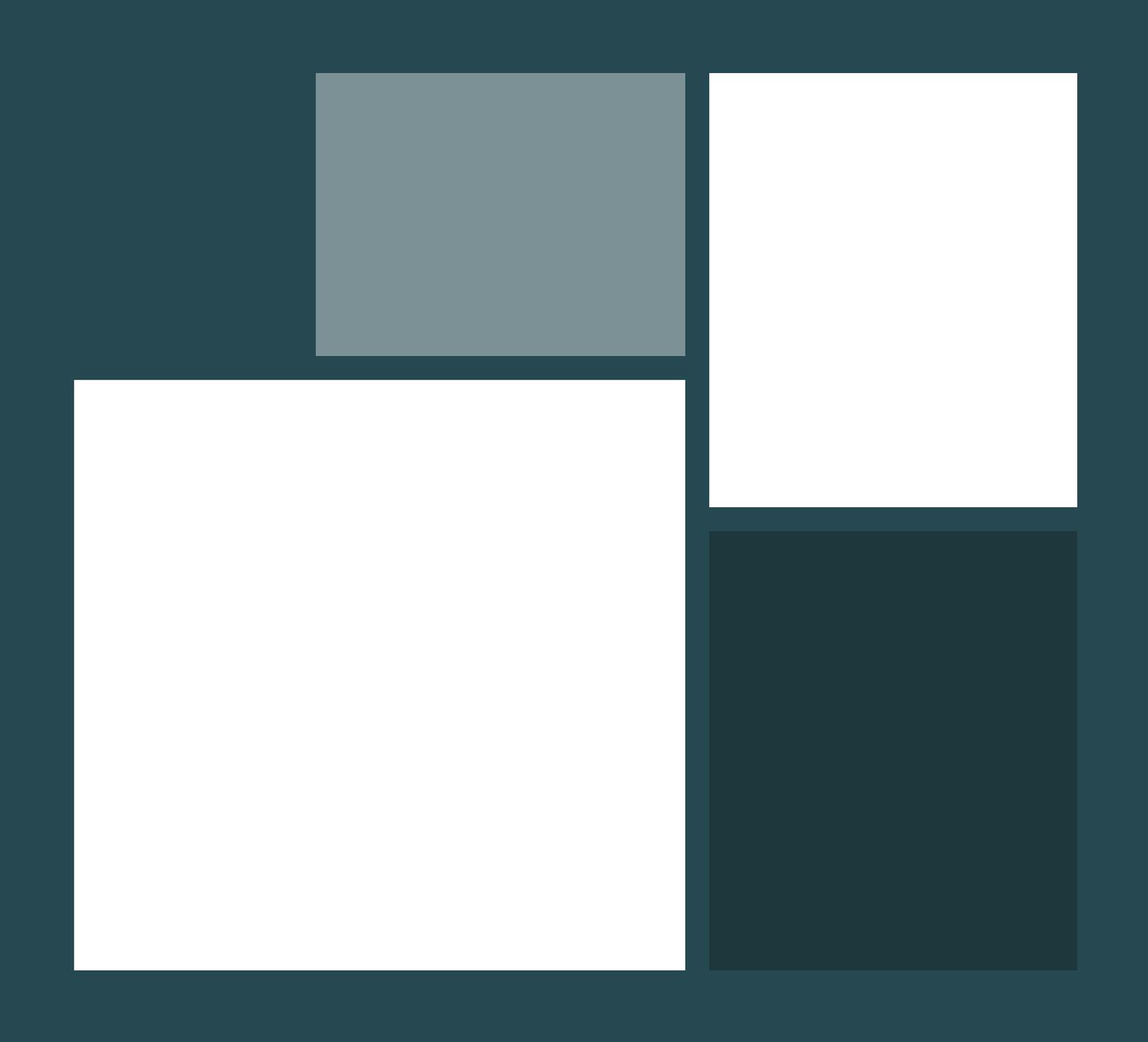
- Research Agenda
- Training Programs
- Programmatic Partnerships and Coalitions



Webinar Goals

*Top-Level Topics
for this Session*

1. Strategic Planning & Goal Setting
2. Building Strong Community Relationships
3. Board Governance
4. Stopping Something



1. Strategic Planning

How people are wired makes all the difference in your messaging and approach

Importance of Strategic Plan to Your Work

A strategic plan for a Friends of Libraries group - or any small nonprofit - helps provide direction and focus. Even if the mission of your organization are not changed by the planning process, a strategic plan can help the group identify ways to better achieve or support that mission.

Minimum Viable Plan Elements

1. Vision, Mission, and Core Values
2. “Look at” the Organization
3. Tactics, Timeline, and Measures
4. Budget, Resources, and
Responsibility
5. Review and Adjustments
6. Contingency
7. Timeline

Vision, Mission, Values

Vision Statement:

An aspirational description of what the group hopes to achieve in the long-term.

Mission Statement:

A clear and succinct representation of the group's purpose. Even if it doesn't change, it should be reaffirmed in the strategic plan.

Core Values:

A list of guiding principles that will dictate behavior and action.

Look at the Organization

SWOT Analysis (or a similar assessment tool):

- A breakdown of the organization's Strengths, Weaknesses, Opportunities, and Threats. This helps the group understand its internal and external environment.

Strategic Goals/Objectives:

- These are broad, primary outcomes the group wants to achieve. They stem from the mission and vision.

Tactics and Timeline

Tactics or Action Plans:

- Specific steps or initiatives the group will take to achieve the strategic goals. This section should answer: "How will we achieve our goals?"

Performance Indicators:

- Metrics that will help the group measure the success of their tactics and overall strategy.

Timeline:

- A clear timeline that assigns deadlines to each tactic or action step. This helps maintain accountability and momentum.

Budgets, Resources, Responsibilities

Budget or Resource Allocation:

- A clear understanding of the financial and other resources required to execute the plan. This includes expected revenues, fundraising targets, and anticipated expenditures.

Responsibility Assignments:

- Details about who in the organization is responsible for each action item, ensuring that tasks have ownership.

Review Mechanism:

- A plan to periodically (annually, biannually, or quarterly) review the strategic plan's progress and make adjustments if necessary.

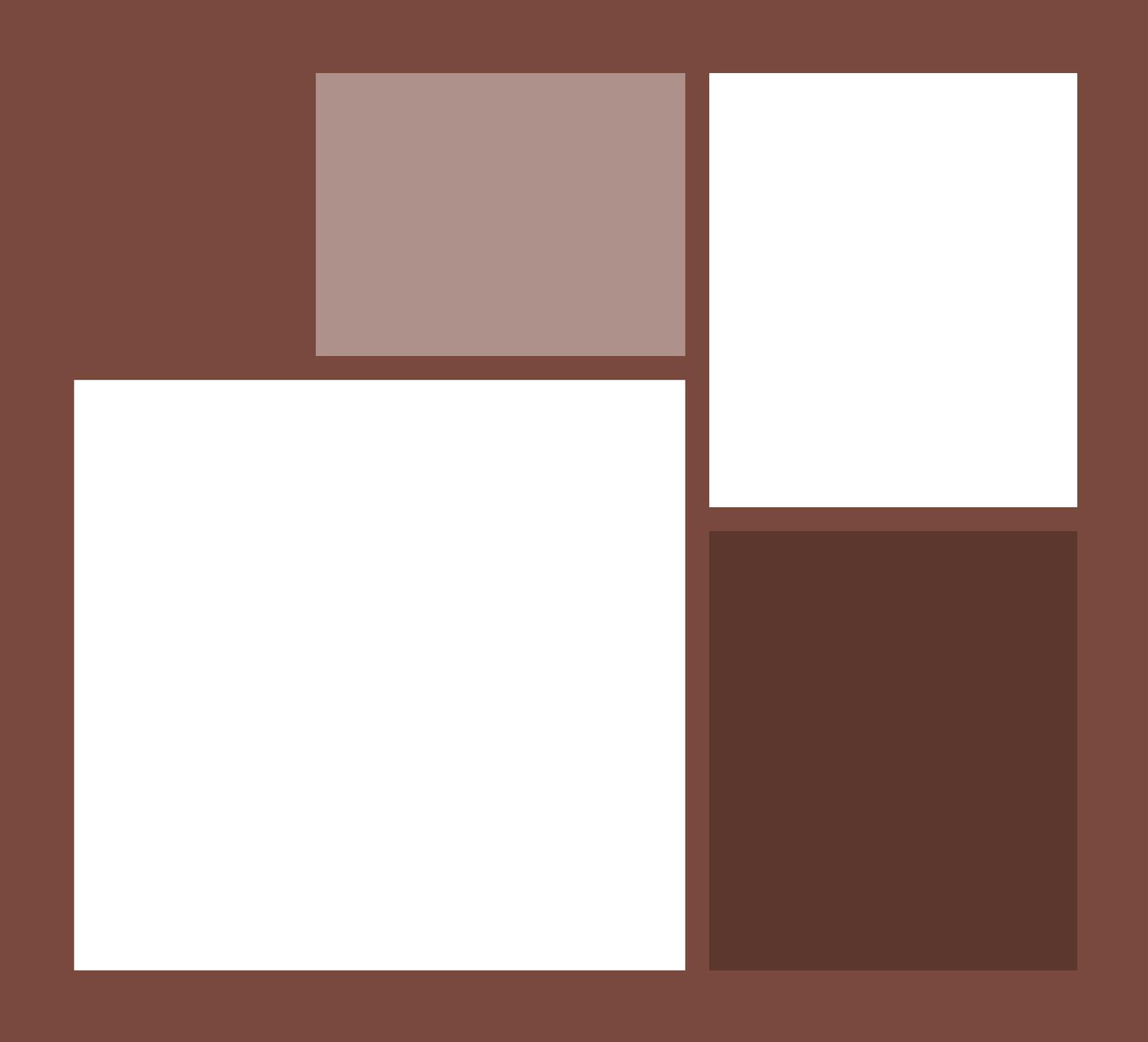
Contingency and Timeline

Contingency Plans:

- Anticipation of potential challenges or barriers and having a predetermined course of action to address them.

Timeline is a Call to Action:

- A closing statement that reiterates the importance of the plan and the commitment to achieving it, followed by a call to action to encourage everyone's participation.



2. Building Strong Community Relationships

How to put this into practice

What Does a Public Library Do?

- Lends Books
- Early Literacy
- Health and Wellbeing
- Programs for Community
- Skills and Training
- Preservation and History
- Quiet Places
- Jobs, Local Economy
- Resource Sharing

*Points of
Intersection for
Your Funding or
Volunteer Work*

Identifying and engaging with key community partners and stakeholders enables effective Friends of Libraries to leverage other organizations and individuals who also value the role libraries play in fostering education, community engagement, and cultural enrichment.

Who Else Cares?

1. Local Businesses: They can offer sponsorships, donations, or even in-kind support for events.
2. Schools and Educational Institutions: Collaboration for educational programs, events, or fundraisers.
3. Local Government: City or town councils may provide funding, support, or even spaces for events.
4. Civic Organizations: Groups like Rotary Clubs, Kiwanis, and Lions Clubs often support local initiatives.
5. Arts and Culture Organizations: Local theater groups, museums, and cultural centers can collaborate on events.
6. Local Nonprofits and Charities: They might collaborate on community initiatives or events.
7. Community Centers: They might provide spaces for events or collaborate on community programs.
8. Local Bookstores: Potential for partnerships on author events, book sales, or reading programs.

Organizations

1. Local Authors: They can partner for book readings, signings, or workshops.
2. Retired Teachers and Librarians: They might volunteer their time, skills, or even financially support the organization.
3. Library Patrons: Regular library users who understand the value of the library in their lives.
4. Local Elected: They often support initiatives that benefit the community.
5. Local Celebrities or Influencers: Their endorsement can boost the visibility of initiatives.
6. Parents and Families: They benefit from children's programs and may be willing to support or volunteer.
7. Philanthropists: Local individuals who routinely give to charitable causes.
8. Alumni: Individuals who've moved but have fond memories or connections to the library can be tapped for donations or endorsements.
9. Young Professionals: They might be looking for volunteer opportunities or ways to engage with the community.
10. Students: They can volunteer, especially if it counts towards community service hours for school or other requirements.

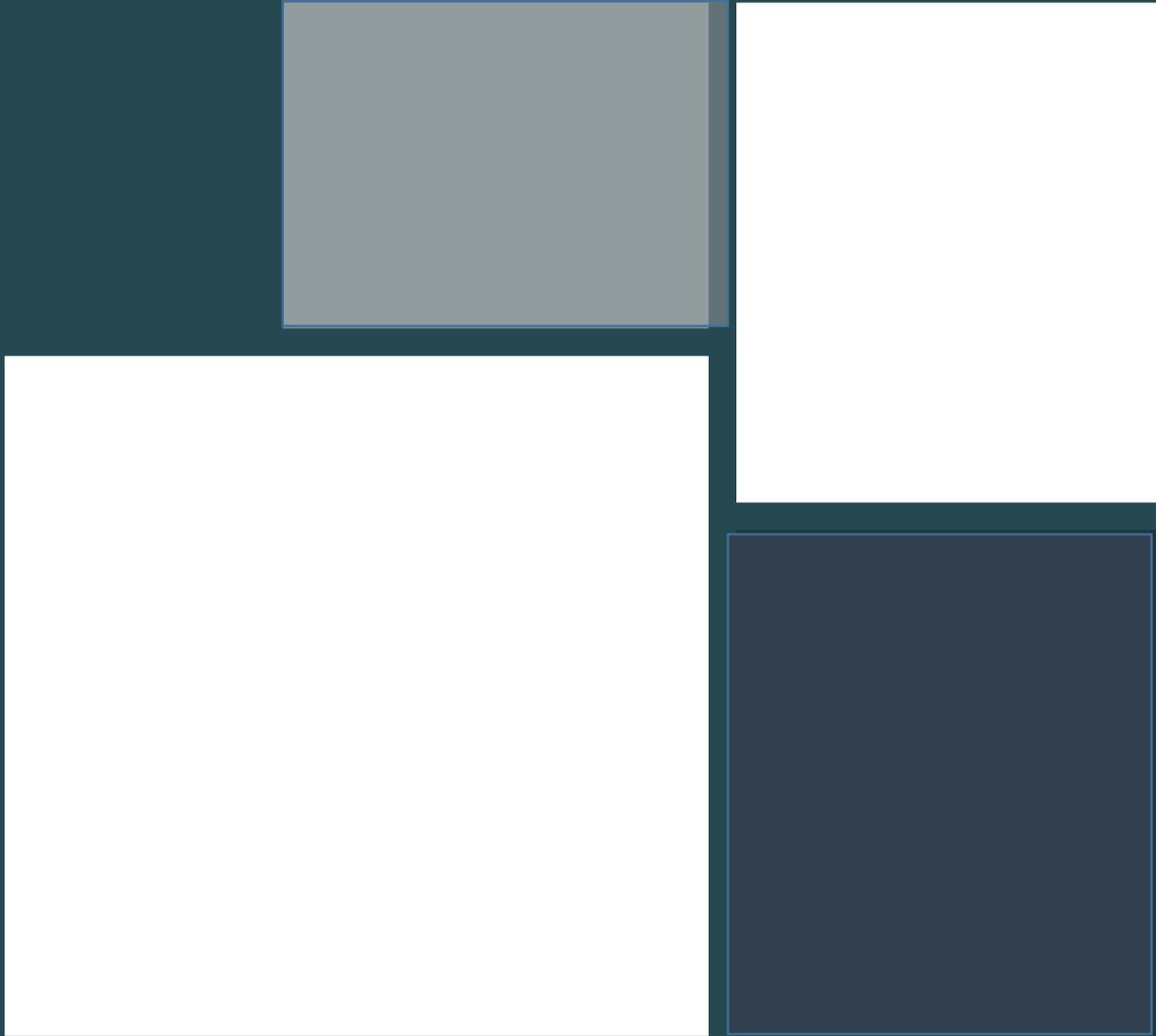
Individuals

People have three budgets to spend:

- Money
- Time
- Good Name

We need to create systems and pathways for them to spend their budgets with us.

*How Can They
Be Involved*



3. Board Governance

The Duty of Care refers to the responsibility of board members to exercise reasonable care and diligence when making decisions on behalf of the organization. This entails staying informed about the organization's activities, participating actively in board meetings, and making decisions with the best interest of the organization in mind.

Board members should rely on their own judgment and, when necessary, seek expertise or further information to ensure their choices are informed and in alignment with the organization's mission and best practices. It is the expectation that board members act in good faith, avoid negligence, and prioritize the organization's well-being and sustainability above personal interests or external pressures.

Definition - Duty of Care

"Duty of Care" is a fundamental principle that guides board members in their decision-making and oversight roles for a nonprofit.

“Legal and Financial”

“Marketing and Outreach”

“Managing Money”

“Fundraising and Membership”

“Leadership and Volunteers”

Duty of Care

Duty of Care: Ensure that the organization operates with prudence and operates in the best interest of the stakeholders.

- Regularly review financial statements.
- Ensure compliance with laws.
- Ensure filing of required tax documents, such as the Form 990.

Fiduciary Responsibility: Safeguard the organization's assets.

- Implement and monitor financial controls.
- Avoid conflicts of interest.
- Ensure resources are used to fulfill the organization's mission.

Legal and Financial

Duty of Care: Oversee financial stability.

Periodic review of budgets.

Approve major expenses.

Fiduciary Responsibility: Ensure sustainability.

Diversify revenue sources.

Implement sound investment strategies.

Policy Responsibilities:

Create policies regarding financial management, investments, and reserves.

Money Management

Duty of Care: Ensure ethical fundraising practices.

- Understand sources of revenue.

- Ensure transparent donor relations.

Fiduciary Responsibility: Properly manage and allocate donations.

- Dedicate funds as per donor intent.

- Safeguard donor information.

Policy Responsibilities:

- Develop fundraising and membership policies, including acknowledgment, donor recognition, and data protection.

Fundraising and Membership

Duty of Care: Ensure effective leadership.

Insurance

Regular performance reviews of executive leadership.

Ensure adequate training for board members and leaders.

Fiduciary Responsibility: Ensure parity and fairness.

Policy Responsibilities:

Establish policies regarding recruitment, training, conflict resolution, and retention of leadership and volunteers.

MOU's and other legal agreements with host libraries

Leadership and Volunteers



*Ending
Something*

The Hardest Thing to Do

Evaluating and potentially sunsetting programs or projects is a critical aspect of ensuring an organization remains effective and true to its mission.

Five Criteria

- I. Alignment & Relevance
- II. Outcomes, Impact & Community Perception
- III. Financial & Resource Viability
- IV. Adaptability & External Challenges
- V. Opportunity Costs & Objective Decision-making

After Evaluation

After evaluation, the board can:

- A. Continue the program with no changes.
- B. Modify the program to better align it with current needs and circumstances.
- C. Merge or integrate it with another program.
- D. Suspend it temporarily to reassess in the future.
- E. Sunset or end the program.

It's crucial that decisions are communicated transparently to stakeholders, explaining the reasons and ensuring that the board's decisions are in the best interest of the organization's mission and the community it serves.



Building More Effective Friends Groups

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