

# Friends Session I

## Preparing for a crisis

Presented by Ed Rossman

2019 FLA Annual Conference

Wednesday May 15, 1:00 – 2:00 pm

Steps that Friends groups can take before the hurricane arrives!

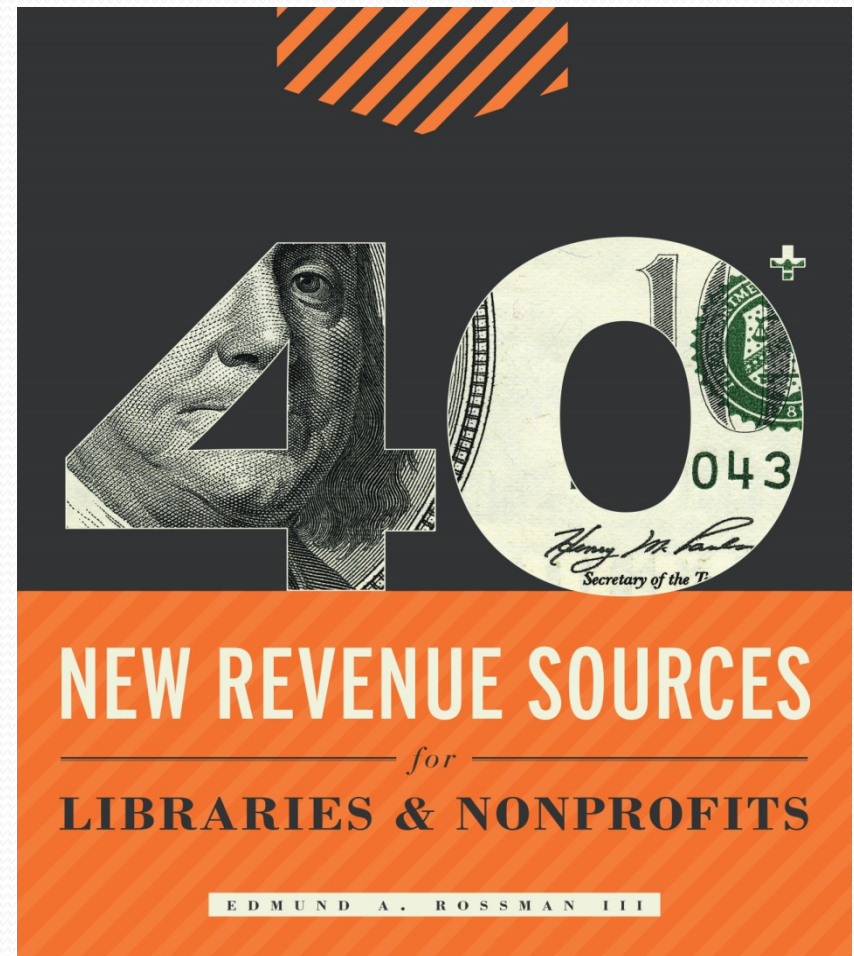
Recruitment and Organizational tips to strengthen your roots.

My eCourse beginning July 8, 2019 and continuing for 4 weeks, Sponsored by ALA.

## My background and interest

- Broadcaster
- Librarian
- Cancer survivor
- Family in Panama City
- [Facebook.com/rev4lib](https://www.facebook.com/rev4lib)

**"The most difficult thing is the decision to act, the rest is merely tenacity." - Amelia Earhart**



# The Money Matrix

| Revenue type           | Source:<br>Public,<br>Business,<br>Foundation | Amount:<br>Low,<br>Moderate,<br>High,<br>Significant | High<br>Start-up<br>costs:<br>Yes/No | Public<br>Relations<br>effort:<br>General,<br>targeted | Board<br>involvement:<br>General,<br>Specific | Policy<br>requirements:<br>General,<br>Specific | Government<br>Involvement:<br>Possible<br>UBIT,<br>None | Renewable:<br>One-time,<br>Continuing,<br>Seasonal,<br>Legacy | Category:<br>Advertising,<br>Sponsorship,<br>Facility,<br>Product |
|------------------------|-----------------------------------------------|------------------------------------------------------|--------------------------------------|--------------------------------------------------------|-----------------------------------------------|-------------------------------------------------|---------------------------------------------------------|---------------------------------------------------------------|-------------------------------------------------------------------|
| Facility<br>Rental     | P/B                                           | M                                                    | N                                    | G/T                                                    | G                                             | S                                               | T                                                       | O                                                             | F                                                                 |
| Fifty-fifty<br>Raffles | P                                             | M                                                    | N                                    | G                                                      | S                                             | S                                               | T                                                       | O                                                             | P                                                                 |
| Gift Shops             | P                                             | M                                                    | Y                                    | G                                                      | S                                             | S                                               | T                                                       | C                                                             | P                                                                 |

# Definition of Crisis

- According to Dictionary.com:
  - a condition of instability or danger, as in social, economic, political, or international affairs, leading to a decisive change.
  - a dramatic emotional or circumstantial upheaval

Institutions can open quickly, but with vastly depleted resources. Replenishing them without depending on an overwhelmed bureaucracy is easier than ever before, thanks to the internet and social media.



# New Orleans advice

- Ebsco interviewed librarians from Hurricane Katrina that gave insights into how the hurricane affected them
- What is the need for libraries?
- Seale Paterson – They need money!!! Tell people that want to send books to have a book drive and sell the books themselves and then send you the proceeds in a check. Pretty much anything can be fixed with money.

# **Pt 1 - Preparing for a crisis**

**Steps that you can take before the crisis arrives!**

It wasn't raining when Noah built the ark. - Howard Ruff

# Legal and Board policy considerations

- Emergency Powers for Director
- Assessment of policies before chaos disburses the board and quorum is impossible
- Check any tax consequences
- Policies Exercise at the end of this presentation



# Audit now!



**When disaster happens you'll be in shock.**



# Contracts and procedures

- Policies discuss the “what” and “why” aspects of your operations
- Procedures cover the “how” and “who”
- Do contingency planning in advance for anything dealing with money
- Keep your most important backups stored in the cloud or away from your location

# Be prepared to Bug Out



In a crisis change will be fast and furious.  
Have emergency closure procedures  
ready if you run onsite bookstores.

# Anticipate the worst case



February 14 at 8:29 AM

I took these pictures yesterday (feb 14th) for all the outsiders who say we have had time to clean up and rebuild. It has only been 4 months. People are working hard and there has been so much improvement but MICHEAL WAS A HISTORY MAKING MONSTER HURRICANE that left mass destruction. It will take years to rebuild and hurricane season 2019 is fast approaching just under 4 months away. While we are busy rebuilding we have to be getting disaster plans together and restocking supplies. This was an area I don't normally go to so I was seeing for the first time. Unfortunately for now it doesn't matter what area you drive in this is what you will see. We still have people living in tents, cars and homes that shouldn't be lived in. We have so many folks who have had to relocate. We have property owners who have thrown up their hands slapped a for sale sign on the damaged home and moved away. Many businesses are still closed some will never reopen.

All the destruction this hurricane caused and there are people out there who I have ran into while on a cruise that knew nothing of this hurricane.

They aren't the best pictures just what I could get while stopped at lights.

#850Strong



# Inspect your business chain

- Service logistics
- Exercise – Contract Approval
- Recovery time management





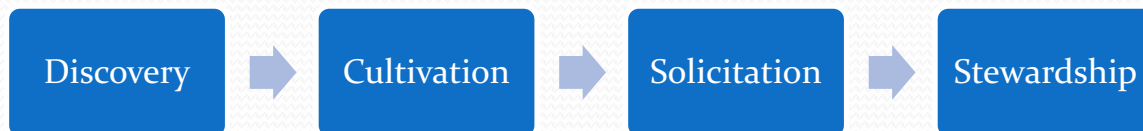
# Promotions

- Recruit as many Friends you can before crisis
- Journaling to your extended core audience as soon as internet is restored
- Term from broadcasting
- Social media emergency plan



# Sponsorships for Loyalty Program

- Exercise For **non-crisis times** – Discovery for sponsors
- Objective: Create a list of potential sponsors through brainstorming or an audit of past supporters.



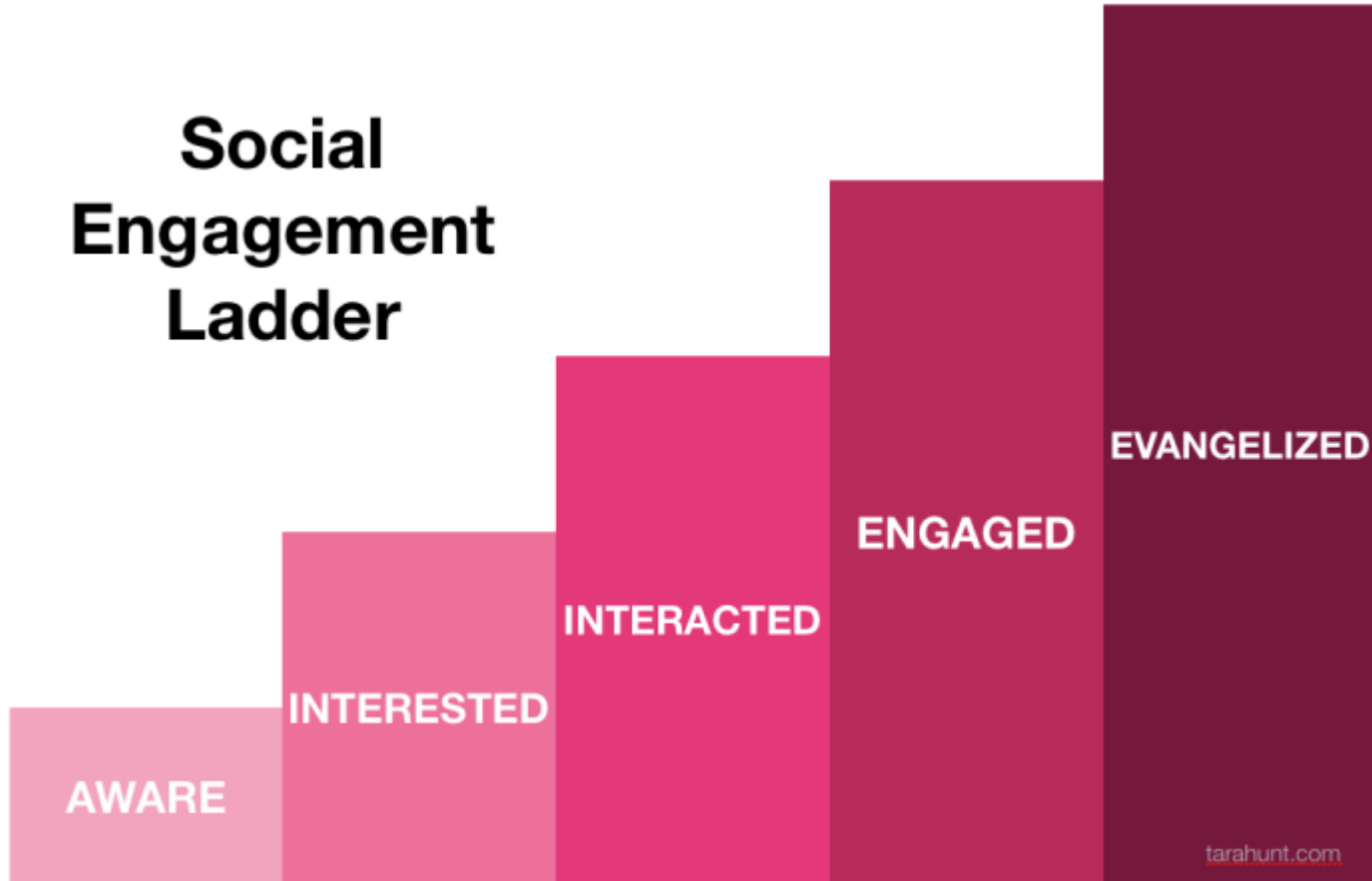
# Loyalty Programs



- Recruit new members and reward older ones by offering values from outside the Library
- Win/Win for Sponsors, members and ultimately, the Library
- Good for bringing in foot traffic. Relationship building for future Sponsors
- Make it game for publicity / Summer Reading Program Models; use same software.

# Extend the passion for your cause

## Social Engagement Ladder





# Gain support from others outside the crisis zone with journaling



# Michael's Angels example

- [#HurricaneMichaelFactOfTheDay](#)
- Hurricane Michael devastated the agricultural industry in North Florida, causing heavy crop losses as well as catastrophic damage to production and processing structures.
- Total Losses suffered by cotton growers in North Florida :  
\$ 56,068,052.

[#SaveNorthFloridaFarmers](#)  
[#Recover850](#) [#850Strong](#)  
[#WarriorWomen850](#)  
[#MichaelsAngels850](#)  
[#Savethe850](#)  
[#SaveTheFloridaPanhandle](#)



# Partnerships

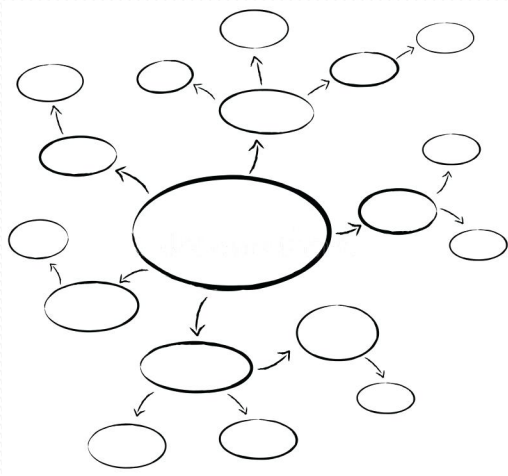


“These awesome prek teachers organized a drive to replenish our destroyed prek classrooms! And the Greek Moving company is donating their time, truck and men to bring the donations to us from 8 hours away! We are SO blessed! — feeling loved.” (Personal Communication: Annie Andrako November 6 • Facebook)



# Brainstorming

## Exercise: Partner Identification





# Use Matching Grants

## **Integrate into any sponsor search**

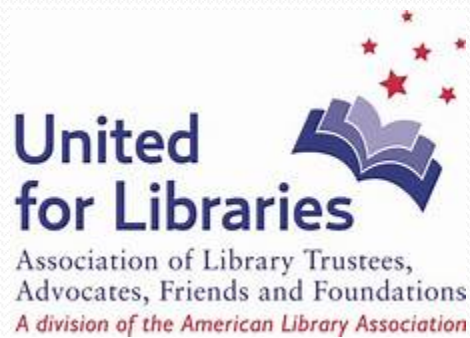
- Identify the areas' largest employers
- Contact the benefits department
- Provide them with the proper paperwork
- [Doublethedonation.com](http://Doublethedonation.com)
- Exercise at the end of presentation

# Pursue Co-op Advertising Donations



Enlist local companies for sponsorships and then encourage them to go to their national brands to aid in your cause.

# Form distant relationships



# Technology

- Satellite vs only cell tower connections
- Contingency plans for communications
- Off-site backups or cloud storage
- “Prepositioned” agreements with network providers in case your own in-house servers are destroyed



# Tech contingencies



- Temporary mirror site using your URL
- A method to access satellite comm
- Recovery plan for your cloud or physical backups
- Crisis list of experts

# Exercise – Policy Audit

- In a disaster zone it may be hard to get a board meeting together to arrange policies on naming rights, crowdfunding, and other fundraising methods.
- Your policies guideline audit
  - Look through your organizations policies for guidelines on naming rights / sponsorships
  - Investigate policies for your oversight organization; ex: school board, university, city or county government.
- Among questions that boards may face include:
  1. What special contingencies need to be considered to handle raised funds and under whose authority will they be disbursed in an emergency?
  2. Does the Director's spending authority need to be expanded so that expenditures over a certain amount that can be spent in a timely fashion rather than requiring a board vote?
  3. Would there be any qualms about using third parties to sell items online for you?
  4. Is there anybody you would not accept money from? Where would you draw the line in acknowledging gifts?

# Exercise – Contract Approval review

- Objective: In the prior exercise policy oversight was asked to be reviewed. However there may be business office protocols that are not included in a policy book. This exercise requires you to investigate those.
- Very simply put, as a nonprofit agency, is there a dollar, timeframe, content or any other threshold for contracts that your board or oversight mechanism (city, county, state) needs to approve?
- Know your constrictions so you can get around them!

# Exercise – Discovery for sponsors

Potential sponsor brainstorming/audit joint exercise!

- Come up with top 25 potential local sponsors
- Describe 3 ways, use simple table columns:
  1. Have a close local tie; friend, family y/n
  2. Existing or past sponsor? y/n
  3. Are they a neighbor to your facility but w/ no past use and no personal ties y/n



# Exercise – Double the Donation audit

- Do an environmental scan of major employers and national chains in your area
- Use [DoubletheDonation.com](http://DoubletheDonation.com) to see if they have a Matching Grant program.
- Sherwin-Williams matches up to \$3,000 per employee or retiree each year at a 1.5:1 ratio. People can donate up to \$3,000 and Sherwin-Williams will provide a contribution of up to \$4,500.

# Exercise – Partner Identification

- Professional partnerships outside the disaster zone are needed; won't know how big that is until you need them!
- Pre-planning can be helpful and increase recovery efficiency
- Try drawing a spider web with your organization in the middle. Use strands to organize different groups of possible support groups outside of your immediate region, at a statewide, regional or national level. (Slide image)

# Sample Policy pages

- <http://www.jaxpubliclibrary.org/conference-center>
- <http://www.akronlibrary.org/about/policies/sponsorship-partnership-policy>
- <http://www.ala.org/united/trustees/policies>
- <https://www.ocls.info/sites/default/files/GiftPolicyRevision2006.pdf>

# References

Double The Donation. 2018. “Matching Gift Search”

<https://doublethedonation.com/tips/matching-gift-search/>

Ebscopost. September 21, 2017. “Recovering and Rebuilding after a Hurricane — What Librarians Learned from Hurricane Katrina”

<https://www.ebsco.com/blog/article/recovering-and-rebuilding-after-a-hurricane-what-librarians-learned-from-hu>

Interview comments by Seale Paterson, Library Manager — Hubbell Library



# Good luck! Contact me!

- (216) 392-0200
- [erossman74@yahoo.com](mailto:erossman74@yahoo.com)
- [www.facebook.com/rev4lib](https://www.facebook.com/rev4lib)
- <https://www.linkedin.com/in/erossman74>

To buy the book or enroll in the eCourse

- <https://www.alastore.ala.org/content/40-new-revenue-sources-libraries-and-nonprofits>

Use discount code NRSL19 for \$5 off-Exp.12/31/19

- <https://www.alastore.ala.org/content/40-new-revenue-sources-libraries-and-nonprofits-ecourse>

But wait! There's more!!

My previously posted Facebook examples...



# Methods 35-37, Sponsorship of Collections, Furniture and Materials

Renovations and upgrades can literally create a new library, at a fraction of the costs of building one! The story below is how a library built in 1955 received a modern makeover, with thanks to community support and without raising taxes.

The three methods above can help prevent having to say, "we don't have the money for that".

<https://www.svvoice.com/mission-branch-librarys-renovations-are-revealed-at-grand-reopening/>

# Chapter 7 Promotions: Getting the word out.

Now is the time many organizations plan for next year. The following link will help you focus on your Communications Plan. Chock-full of great resources,

I particularly like their "**Newsjacking**" idea, trying to align what you do to an item in the news. To help you in this, they link you to a national day calendar. that lists days, weeks and months used to celebrate a cause, whether silly or serious! "Pi(e) day, March 14, 2020".

You can chart out a whole year of displays and programs here, and let local media outlets know about your efforts. **This sometimes helps them as much as it does you!**

<https://www.councilofnonprofits.org/thought-leadership/planning-your-nonprofit-s-communications-ever-changing-world>

# Method 17. Event and Program Sponsorship

Thanksgiving is fast approaching and no doubt many libraries will be conducting special programs and displays around it. It's the perfect time to kick off a campaign to buy a Charlie Cart! These go for about \$10,000 dollars, and are used for teaching proper food handling, cooking skills and nutrition fun-damentals (emphasis on fun) through a mobile kitchen. The story below explains how some libraries are implementing mobile kitchens in their communities. Charliecart.org is a turn-key mobile kitchen operation that not only provides equipment but also 57 lesson plans!

Ever see a Nascar vehicle without brand labels? Me neither. No matter the size of your service area, I'm sure there are sponsors ready to help fund and place their brand label on this tasty mobile opportunity.

<https://americanlibrariesmagazine.org/2018/09/04/movable-feast-library-mobile-kitchens/>



# Chapter 2 - Nonprofit lessons from Public Broadcasting

If you listen or watch Public Broadcasting of any type in the United States you're aware of their regular interruption of normal programming to have membership drives. National Friends of the Library Week is Oct. 20-26, 2019, sponsored by United for Libraries.

If you do not have an ALA website login, click the link below to create one (or borrow one) and then return to ALA Connect to join the free National Friends of Libraries Week community. many useful ideas and resources are there. Honor your Friends, encourage others to join, **and** you don't have to disrupt your activities to do this!!!

<http://www.ala.org/Template.cfm?Section=login&template=/CustomSource/register/register.cfm>

# National Volunteer Month

Every library and nonprofit needs and uses volunteers to support their missions. Everyone knows that organizing them takes a lot of effort. SignUpGenius is a platform that helps simplify the process and can be used for various activities, including fundraising. They offer various plans, including a free service for families and small groups.

They had a contest going on for you to nominate your favorite nonprofit to receive a \$500.00 award! Check it out below and make a note to revisit them next year!

<https://www.signupgenius.com/national-volunteer-month-giveaway>

# Chapter 9 Grants and Community Partnerships

The article below talks about the efforts of a local Friends group in a unique fundraising idea, the \$1,000.00 club! Friends groups nation-wide provide great support for libraries. Their efforts can raise thousands, but go a long ways to raise millions through grants. "Grants are awarded to those who demonstrate both need and community support," the article states.

A quote I use in my book is apropos here regarding building revenue, "yard by yard is hard, inch by inch is a cinch".

<https://www.advocate-news.com/2018/12/30/cleanup-for-library-expansion-projected-for-spring/>

# Chapter 2 Nonprofit Lessons from Public Broadcasting

In this chapter I introduce the concept of Moves Management relationship building, comprised of 4 moves. Discovery, Cultivation, Solicitation and Stewardship. Each of the 40+ methods of fund-raising I discuss has a custom suggestion for maintaining good stewardship relations. The 6:30 video below has an experienced fund-raiser talking about how critical this skill is. She'd rather have a dozen donors handled well than 100 handled superficially.

[https://moviemondays.com/stewarding-donors/?inf\\_contact\\_key=11652b37a0766e28c86c14cd3c230b88680f8914173f9191b1c0223e68310bb1](https://moviemondays.com/stewarding-donors/?inf_contact_key=11652b37a0766e28c86c14cd3c230b88680f8914173f9191b1c0223e68310bb1)



# Chapter 6 Contracts and Procedures

The Haverford Township Free Library has produced an online sponsorship page that is an excellent example of not just gathering contact information, but an opt-in for other fund-raising opportunities, a choice of sponsorship levels, and a matching gift prompt!

<https://secure.e2rm.com/registant/donate.aspx?eventid=141326&langpref=en-CA&Referrer=http%3a%2f%2fwww.haverfordlibrary.org%2fdonate-online>

# Chapter 9 Grants and Community Partnerships

For years, media stations have been helping local retailers increase their advertising programs by having them use co-op (short for co-operative) advertising. Libraries and nonprofits can use this concept as well!

The money can come in two ways. First, it's when a local business, for instance, a computer services firm, uses manufacturers money to help pay for an advertising campaign. In a sponsorship acknowledgment page your library or NP might have their local logo with another brand trademark next to it. The second way is when advertisers within a local area, like a Mall or series of street blocks, or who have a shared theme, go partners on a project.

In seeking revenue for a local cause, approaching major brands might be a waste of your time, but finding a local community business with ties to them already might lead to a good, steady revenue stream.

National firms have the revenue for assisting local advertising budgets, and if involves community projects, so much the better! A local hardware store may be so successful, or face minimal competition, that they hardly advertise and the national funds available to them as exclusive dealers for a national brand, like ABC lawn-mowers, go unused. You could enlist them to aid in your cause and help them “move up the ladder” of sponsorship, from \$100 to \$200, using National ABC Lawn-mower money. The link below explains this **potentially lucrative** concept in more detail.

<https://www.entrepreneur.com/encyclopedia/co-op-advertising>

# Method 21. Matching Grants and Donation Challenges

Giving Tuesday, November 26 this year, is a date I hope you're preparing for. As I mention in my book, Matching is a great way to grow donations. Here's what I suggest. Do an environmental scan of major employers and national chains in your area. Then use the tool below to see if they have a Matching Grant program. For those that do, reach out to them about supporting your organization, or make a list you can post in-house to encourage patrons to give through the process that company uses to match their funds.

You can only research one company at a time. Try Sherwin-Williams. You will see that Sherwin-Williams offers a matching gift program where the company matches donations made by employees and retirees to a variety of nonprofits. It shows the minimum, maximum and match ratio. Theirs is a generous 1.5:1 ratio. Sherwin-Williams matches up to \$3,000 per employee or retiree each year at a 1.5:1 rate. That means employees can donate up to \$3,000 and Sherwin-Williams will provide a contribution of up to \$4,500.

The link below give a warning message that it might be gone soon. For now it works great, but just one company at a time. It still provides valuable information. For another big company, McDonalds, it'll give you a warning that franchise employees are not included in the program. All have guidelines that will make you go through their corporate process easier.

<https://doublethedonation.com/tips/matching-gift-search/>

# But wait, last but not least! Bonus Links!

## Loyalty Program Software

WaveToGet is a loyalty card solution for small businesses including auto dealerships, restaurants, manufacturing, retail stores and IT. Users can implement various types of loyalty programs to suit their needs and track program performance.

Users can incorporate program types including gift cards, loyalty programs, rewards, member benefits, customer clubs, discounts, points cards and more. Businesses can customize loyalty program cards and gift cards with company colors and logos.

WaveToGet offers a number of ways for businesses and clients to keep track of rewards programs including ID stickers, key fobs, cards and mobile IDs. As loyalty programs progress, users can track program balances to see how their programs are performing.

Support is offered over the phone and via email. Pricing is per month.

<https://www.softwareadvice.com/customer-loyalty/wavetoget-profile/>

Use this page to compare and contrast other programs:  
<https://www.softwareadvice.com/customer-loyalty/>

Contact me anytime!  
erossman74@yahoo.com



Act now! You have an important mission.  
Be positive, be proactive, keep the faith.