

***Donor Recognition Programs in Selected Public Libraries:
A Report for the Chapel Hill Public Library Foundation***

***Prepared by Melissa Cain
Campaign Consultant***

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Executive Summary

Introduction

This report addresses the subject of using donor recognition (including naming opportunities) as a fundraising method for the benefit of public libraries. This option is an effective tool for public library foundations who seek private funds to supplement public dollars. In general, recognizing donors and offering naming opportunities works especially well in arts and culture where competition for private funding is intense.

Programs of donor recognition vary from library to library. The purpose of the programs, however, is the same. It is very important that non-profit institutions such as libraries or library foundations recognize gifts of consequence with tact and good taste. Most donors do not seek public tribute but appreciate being honored in a meaningful and visible way. It is the non-profit's responsibility to carefully plan and develop a program of donor recognition that is appropriate. These programs are initiated by the non-profit and presented to or reviewed with individual donors. Typically, well-designed donor recognition paves the way for other, perhaps larger, gifts to follow.

This report contains three sections, an ***Executive Summary***, the ***Full Report***, and an ***Appendix***. The Executive Summary and Full Report are available in electronic form, and all three sections are available in print format.

The Chapel Hill Public Library Foundation Campaign

Presently, the Chapel Hill Public Library Foundation is engaged in the Ensuring Excellence Capital Campaign, a five-year effort begun in 2006 and ending in 2011. This is the first capital campaign that the Foundation has undertaken since it was established in 1997. The purpose of the campaign is to raise private funds that will help increase the Chapel Hill Public Library's book and media collection by 68,000 items by 2011, as recommended in the 2003 Library Master Plan.

Although the \$2.5 million campaign goal is ambitious, it represents a real need in our community. To reach this campaign goal, the Foundation will employ many different fundraising tools and tactics. That is why the Foundation is examining donor recognition opportunities as ways to help attract charitable gifts.

Methodology

This report examines five libraries in different communities to learn how they incorporate donor recognition opportunities in fund-raising activities.

The *first group of three libraries* included in this report was selected because they are situated in socially progressive towns where major state universities are located. These libraries are: Madison Public Library (WI), Boulder Public Library (CO) and Ann Arbor District Library (MI).

The *second group of two libraries* has library facilities that were expanded or built under the direction of Robert A. M. Stern Architects, the same firm working with Chapel Hill on the current library renovation and expansion project. These libraries are: Bangor Public Library (ME) and Clearwater Public Library (FLA).

A full analysis of the donor recognition programs is discussed in the *Full Report*, with collateral materials from some of those programs in the *Appendix*.

Conclusion

All five of the public libraries surveyed in this report use donor recognition and naming opportunities in their fundraising programs and campaigns. Each library is different in size and character and each serves a different area of the country. However, all of these public libraries are municipal libraries and all supplement tax-based dollars with private support.

The following chart help explains how these libraries manage donor recognition.

Library	Foundation	Donor Recognition Program	Formal Policy	Naming Procedure
(Asterisk denotes naming opportunities)				
Madison	YES	YES*	YES	Refer to Policy
Boulder	YES	YES*	NO	Building Committee works with architect
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Bangor	NO	YES*	NO	Trustees, campaign volunteers and Library Director decide
Clearwater	YES	YES*	NO	Foundation staff and board and campaign committee volunteers decide with approval of Trustees

It is clear that facility expansion and new building plans for main libraries or for branch libraries make using donor recognitions programs for fund-raising important. The building projects in this report--renovations, expansions or new library facilities--all required a public/private partnership to succeed. Each of these libraries and their attendant foundations stated that their efforts to raise significant private funds to create a public library worthy of their communities

would have been severely limited without incorporating donor recognition practices and naming opportunities into their campaigns.

Often permanent naming opportunities are available for gifts that will have a large impact or even those that make a modest difference. In a few instances, benefactors are granted the privilege of placing their names, the name of the company they work for, or the name of a loved one on a library building. However, a much more common practice is to offer naming opportunities for library interior spaces, events, cultural series, book funds, or even garden benches, auditorium seats, or bricks/tiles that display the names of benefactors.

Why is it important to be able to offer donor recognition or a “menu” of naming opportunities?

- It is a unique and visible way to thank those special people who assumed leadership roles in a library campaign.
- It may be an added incentive to attract a gift.
- It appeals to those who want to leave a legacy in a special place, honor the memory of a loved one, or pay tribute to those who have made enormous contributions in the life of individual people or to a community.
- Heirs-apparent, and members of succeeding generations, will continue the tradition of giving begun by their predecessors.
- It can inspire others to make significant gifts.

As this report makes clear, donor recognition and naming opportunity policies are helpful to a fund-raising campaign. The Madison Public Library is a leader in this area and serves as a model for other libraries, including the Chapel Hill Public Library.

***Donor Recognition Programs in Selected Public Libraries:
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Full Report

Introduction

This report addresses the subject of using donor recognition (including naming opportunities) as a fundraising method for the benefit of public libraries. This option is an effective tool for public library foundations who seek private funds to supplement public dollars. In general, recognizing donors and offering naming opportunities works especially well in arts and culture where competition for private funding is intense.

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Background

Philanthropy in America is a highly regarded part of our heritage. When it comes to libraries, our nation has a long tradition of benefactors helping public libraries build buildings, enlarge book collections, and improve access to technology.

Charitable giving in America began in the 1600's. Now, more than four hundred years later, the tradition is stronger than ever, with philanthropists capturing media headlines for their generosity and social impact. Today, baby boomers are transitioning to active civic participation in their retirements and are expected to contribute unprecedented sums of money to non-profit organizations.

Yet in America, philanthropy carries a tension between morals and money. Suspicion about the politics of goodwill and corporate giving exists. In addition, there may be concern about donor motivation and intention. (Is the donor trying to "purchase" credibility or special favors?) These tensions occur because philanthropy is about the interests of others as well as self-interests. Trust and an understanding of shared values must be established during the cultivation of the relationship between the prospective donor and the non-profit. To avoid problems and to clarify their values, non-profits rely on official policies for the receipt of gifts and for the recognition of gifts.

Today, innumerable non-profit organizations depend upon private support to maintain their services and to remain competitive in a rapidly changing culture and economy. For many public institutions, including public libraries, tax revenues provide only a portion of what is necessary to achieve and maintain excellence. Private money makes up the difference.

Public Libraries and Major Gifts

Starting in 1881, Andrew Carnegie tapped his personal fortune and donated \$56 million to build 2,800 “free and open” public libraries across the nation. Because Carnegie required communities to use public funding to operate the libraries, he formalized the public-private partnerships that support public libraries. Since 2000, the Bill and Melinda Gates Foundation has transformed the character of public libraries in America, granting over \$325 million to connect people in public libraries with the Internet and to other sources of electronic information. The Kresge Foundation has helped hundreds of public libraries with challenge grants to renovate, enlarge, or build new space. Without exception, America’s premiere public libraries are supported by a combination of public and private funding, including endowment, with returns to be spent in perpetuity.

Over the past twenty-five years, fund-raising for public libraries has become more formalized. Many public library foundations established themselves and incorporated as 501c 3 organizations. Their shared purpose is to secure private support for local public libraries in order to augment, not replace, public support. In many highly educated communities, the population is growing faster than the tax monies available to support the library and its user demands. As a result, library foundation fund-raising programs frequently include capital campaigns with goals exceeding one million dollars. As more library funding needs are identified, more fund-raising methods are necessary to attract donations.

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Information was gathered in these ways: research on the community, the library and the library foundation as posted on their respective web sites; email communications with library staff and library foundation staff; telephone conversations with library directors and foundation leaders; and the study of materials generously shared by these groups. In addition, other general information was gathered by postings to electronic library list-serves, including the North Carolina Public Library Director's Association (NCPDLA) and the American Library Association Friends of Libraries (FOLUSA).

Group 1: Public Libraries in Communities Similar to Chapel Hill

The Madison Public Library, Madison, Wisconsin

The Madison Public Library is of prominent interest for the purposes of this report. The Chapel Hill Community Leadership Council recently traveled to Madison to gain insight into the inner workings of a city that maintains a small town feel. Madison is the capital of Wisconsin, the Dare County seat, and home to the University of Wisconsin at Madison. It is the second largest city in Wisconsin and one of the fastest growing. It has a population of approximately 265,000, nearly 50,000 of those students. Most of the residents work for state government, although a growing number of technology companies and biotech firms are influencing the city's economy. The Madison Public Library consists of a Central Library and eight branches that serve the increasingly culturally, linguistically, and ethnically diverse City of Madison. One branch is just now starting construction and a ninth branch is in early planning stages, sparked by a gift of land and money from a large local housing developer.

The Madison Public Library Foundation was established in 1993 because the demands for library services and the needs and opportunities facing the library were growing much faster than the public money available to support them. The mission statement of the Foundation is "to enrich, not replace, traditional tax-based support through private fundraising from individuals, businesses and foundations." All funds that benefit the library are raised through the foundation. The library has no staff with fund-raising responsibility, although the library director makes calls on prospects and donors in coordination with the foundation.

The City of Madison is growing rapidly. Constituent demand is high for new branch libraries (each branch serves a population of 20,000.) However, the City is not able to support the full

cost with public funds. Consequently, the City and the Foundation partner in this effort. For example, two branches were recently renovated--the City gave 80% of the funding and the Foundation contributed 20%. Presently, a new 20,000 square foot branch, Sequoia, is just beginning its construction phase; the City is giving approximately \$5 million towards total project cost and the Foundation another \$1 million for fixtures, furnishings and collections. In addition, each library has a Friends of the Library group. The money that the Friends raise through book sales goes towards the Foundation's goal.

The Madison Public Library Foundation makes naming opportunities available for donors. According to the director of the Library, Barbara Dimick, this option is essential for their Foundation to reach campaign goals. Both Director Dimick and the President of the Foundation, Judy Olson, agree that naming opportunities must be available if they are to succeed in fundraising and make a difference for the Madison libraries. The Madison Public Library Board, a standing City committee, sets policy for naming opportunities and donor recognition. The Foundation informs the Library Board of internal and external naming opportunities that are available for each project. The Library Board approves opportunities that are in accordance with the policy.

Interior naming opportunities are identified as the floor plan for the building project is mapped out and individual spaces are apparent. A sum of money is attached to each space by using a formula. The cost for the square footage for the building is multiplied by the square footage of the space. Individuals, foundations and corporations may select interior spaces for naming. If a building is to be named for an individual, 51% of the total project cost must be covered. (However, the City of Madison safeguards itself by funding more than 51% of the total cost of each project.) In any case, the library naming opportunities policy states that a building may not be named for a corporation or a religious entity.

Donor recognition may be in the form of a plaque, some signage over a door, or something placed in or around the space the donor names. The Library Design Team, the project's campaign steering committee and the Library Director, all work together on how the signage will look. Every library, including the Central Library, has a donor recognition wall. The architect is charged with the design of the donor recognition wall--where it will go and how it will look. It is different in each library. It may be in a vestibule, a main reading room or in another space. It may be names etched into clear Plexiglas, a painted mural, or tiles displaying names. The amount of money that donors give to be honored on the recognition wall also varies by branch. In one, donors give \$5,000 or more; in another \$1,000, or in another \$500. Individuals, families, foundations and corporations all are included. Names may be in honor of individuals or in memory of individuals. All donor recognition walls are unique to the project and each one is attractive and interesting.

Because the City of Madison partners with the Library Foundation in the expansion and improvement of library service, there is no reluctance about recognizing individual donors in a public space. Tax money funds most of the cost of each building so it is a public building. But private support has made the difference in the project being completed with its necessary components.

According to Director Dimick and the Foundation President, most donors enjoy being recognized in a public space because they are very proud of helping their community. Some donors prefer to remain anonymous.

The Naming of Library Building Policy is in the appendix. A draft of the possible interior naming opportunities for the new Sequoya Branch is in the appendix also.

The Boulder Public Library, Boulder, Colorado

The Boulder Public Library celebrates its 100th Anniversary this year. It first opened in February of 1907, with a gift from Andrew Carnegie of \$15,000 for construction of the building. The City of Boulder agreed to provide financial support; the City Council voted to maintain the library at \$1500 a year and purchased the land for the building. This is a perfect example of the private-public partnership that Carnegie introduced. Today the first Boulder Public Library is known as the Carnegie Branch Library for Local History and is a repository for historical and genealogical information about Boulder County.

The Boulder Public Library consists of a Main Library and three branch libraries. These libraries serve a population of approximately 92,000; about 36,000 of those are students at the University of Colorado at Boulder, the largest university in Colorado. The City of Boulder boasts a median family income of \$70,257—more than \$20,000 above the U.S. average. Boulder is considered to be a politically liberal enclave in the state and is sometimes called “The Berkeley of the Rockies.” However, the city is growing to the east and faces challenges accompanying urban sprawl. Technology companies and scientific research facilities employ residents as well as the university.

Two of the three branch library buildings are named for private benefactors. In addition to the Carnegie Branch, there is the George Reynolds Branch Library, opened in 1968. A gift from the estate of Dr. George F. Reynolds provided the original funds for the Reynolds Branch. Dr. Reynolds was a noted University of Colorado English Literature Professor; a well-respected Biblical and Shakespearean scholar. Later, in 1993, the library expanded and doubled in size. This expansion was funded largely by a \$14 million library bond issue.

The Meadows Branch Library opened in 1989. The space, donated by Boulder developer, Jim Loftus, is in the “Meadows by the Parkway” shopping center. \$500,000 of the bond money was used to transform the space into a library.

The Boulder Public Library system has succeeded over the years through a strong public/private partnership. Boulder is now at work on a new 10-year Master Plan. According to the Director of the Library, Liz Abbott, Boulder’s tax-based funding is much more constrained than ever before. There was a time when library building programs did not rely on private fund-raising for capital needs. “Now,” Director Abbot says, “it is a whole different story. We realize community fund-raising will be a necessity in a rapidly changing library world.”

The Boulder Public Library Foundation was established about 30 years ago and is the only fund-raising body for library needs. The Foundation’s focus is to raise funds for endowment that

supports unique programs that otherwise might not be funded by the City. These include programs on cultural diversity, literacy, and arts programs, including a concert series. During the construction of the Main Library, the Foundation seized the opportunity to raise funds for their endowment. A donor's wall was established in the Main Library, and those who contributed \$5,000 or more were honored with a plaque on the wall. In addition, an auditorium was constructed in the library and donors could provide a smaller amount (\$500) to "buy" a seat and have their name displayed on a small plaque on the back of a seat.

The Boulder Public Library Foundation is separate from the Library and functions with its own board of directors. The Boulder Public Library Commission, appointed by the Boulder City Council, exists to make recommendations to Library Staff and Council on the management of Boulder's public libraries and information services. All of these groups will contribute to the new Master Plan. There is no written naming opportunities policy at present. The Boulder Public Library plans to learn from Chapel Hill as we move forward in our Ensuring Excellence campaign.

Ann Arbor District Library, Ann Arbor, Michigan

The Ann Arbor District Library is a trendsetter for other public libraries. It is located in Ann Arbor, Michigan, a city in and county seat of Washtenaw County. The University of Michigan gives the city a distinct college town atmosphere. The City, long known as a center for liberal politics and leftwing activism, prides itself on counter cultural activities. Local politics reflect these liberal views. There is a Mayor and Council form of government. The Mayor appoints all Council committee members and all board and commission members, including the Library Board of Trustees.

The 2000 census lists a population of 114,024; 36,892 (32%) are university students. The City's economy is service and technology based. It is dominated by education, health services, high technology and biotechnology. The median family income is \$71,293. Average home prices and residential property taxes are well above state and national medians. There is a downtown area with four commercial districts.

The Ann Arbor District Library (AADL) has a main library facility downtown, four branches and a fifth under construction. The AADL is well funded, thanks to the State of Michigan's policy of dividing its libraries into districts that function as independent, tax levying authorities. Since 1994, the Ann Arbor District Library has been the recipient of millage in perpetuity. The Director of the Library, Josie Parker, explained that the AADL receives approximately \$14 million per year from residential property taxes. She estimates that approximately \$11 million of that is used for annual operating expenses. The fund balance is used for new building projects or renovations as needed. If a building project cost exceeds the money received from tax collections, a bond referendum is introduced to supplement available building funds. In summary, the AADL regularly operates on less money than it levies.

There is no public library foundation established in Ann Arbor. However, Director Parker is now at work to develop one. The main Downtown Library needs renovation or replacement. A Space Needs/Facility Study for this project is underway. To meet the future building costs for

such a large project, private donations will be necessary. Director Parker states that donor recognition and naming opportunities will be offered during the downtown library building campaign. She commented, “In Ann Arbor, people believe they own their public library. To display the names of donors in the library’s interior space(s) is one significant way to show much the library is valued by our townspeople.” Today, reading rooms in two branch libraries are named for individuals with historic ties to the library and community. (One of these is deceased; the other is living.) All private gifts made to the AADL are recognized by publishing the donor’s name in the library’s annual report.

There is an active Library Friends organization which is important because Michigan has strict limitations on how tax money can be used. The Friends contribute about \$90,000 a year and provide for things that tax dollars cannot support. These include staff recognition and awards, prizes for summer reading programs, a variety of program offerings, special events, and publicity. The Friends rent space in the downtown library.

Unfortunately, Michigan is suffering from a poor economy and has the highest unemployment rate in the nation. Tax revenues that support the AADL are in jeopardy. Pfizer, a large pharmaceutical firm and the City’s second largest employer, announced in January 2007 that it is leaving the area, eliminating 3,000 jobs. The local economy of Ann Arbor will suffer an unexpected blow. The AADL estimates an annual loss of \$170,000 to their operating budget when Pfizer closes. Consequently, Director Parker believes that a separate 501 c 3 library foundation is more important now than ever before to secure the future of the AADL. When the foundation is started, its focus will be on building endowment to ensure ongoing support in the future for library services, collections and programs. The AADL plans to learn from the Chapel Hill Public Library Foundation as AADL moves forward in starting a foundation of its own.

Group 2: Libraries Designed by Robert A.M. Stern Architects

Bangor Public Library, Bangor Maine

The Bangor Public Library is the largest community library in Maine. Bangor, with a population of 31,473 (2000 Census) is the county seat of Penobscot County. The University of Maine, also in Penobscot County, is in close proximity. Bangor is a major commercial center for eastern and northern Maine. The county is governed by a Mayor; the city of Bangor by a nine-member City Council. The Bangor Public Library is a department of the City government.

The public library was established in 1883 with a \$100,000 gift from a Bangor resident who had amassed large timber holdings. In 1911, fire destroyed most of downtown, including the library and its collections. In 1913, a new library was built in a public park. The Bangor Public Library serves as a reference and research center for northern and eastern Maine. Any Maine resident may use the library and borrow books.

In 1993, the Bangor Public Library needed an \$8.5 million dollar renovation and expansion. The library's endowment was not large enough to cover the total cost of the project. More private support was required to preserve and expand the library.

The City of Bangor places a high priority on helping to develop and sustain local cultural arts and humanities organizations and programs. A long, productive tradition of public/private partnerships exists to fund these initiatives. The City not only seeks but actively encourages contributions from the private sector, believing that collaborations will benefit the quality of life for the Bangor (and University) communities. The City of Bangor has a Cultural Development Ordinance that spells this out. In addition, the City Commission for Cultural Development makes matching grants available to qualifying non-profit organizations on an annual basis.

Well-known author, Stephen King, and his wife, Tabitha, reside in Bangor. Learning that the library needed financial assistance, the King's pledged a gift of \$2.5 million--on the condition that the City match their gift. The City Council quickly agreed. A powerful public/private partnership was struck, giving momentum to the library building campaign. During the capital campaign over 2,000 residents of Bangor contributed, the local newspaper gave \$25,000 and the Kresge Foundation granted almost \$500,000. With so many partners, the campaign goal was met.

Robert A. M. Stern Architects planned the renovation and a spacious addition. The project was completed in 1997. Tabitha King stays involved with the Bangor Public Library and serves as a member of the Library Trustees. The City of Bangor provides 65% of the annual operating expenses for the library. Private support and grants make up the other 35%.

The Bangor Public Library (a 501 c 3 organization) manages its own fund-raising program. There is no library foundation and no Library Friends group. Barbara McDade, the Library Director, has primary responsibility for volunteers and fund-raising. The Library Trustees help her; one Trustee chairs the library's annual fund, which brings in about \$40,000 per year. This money helps support programs in the Bangor Public Library, including the annual "Bangor Reads!" and the purchase of new books. When a gift is made to purchase books, bookplates are placed in books to recognize the name of the donor or the name of those honored. The library benefits from an \$11 million endowment and works hard to attract endowment gifts and bequests to secure its future.

During the campaign for the building renovation and expansion, the Bangor Public Library and the Trustees focused on raising private money for the facility and new furnishings. Once the building project was completed, the focus shifted back to emphasizing the endowment fund.

There is no naming opportunities policy that the Bangor Public Library follows. The Library Trustees and the Library Director worked with campaign committee volunteers to determine what was best. Donors are recognized in various ways. The largest benefactors, Stephen and Tabitha King, asked for no formal recognition in the facility. However, many contributors are recognized by name inside the building. Named plaques appear either on main lobby and central staircase walls or in a specific area of the library when appropriate. Gifts of \$5,000 or more are recognized with named plaques. Gifts of \$1,000 and up to \$4,999 are recognized with names

displayed on tiles or bricks. Inside the library is a donor recognition wall made of brick. When the renovated and expanded facility opened, a commemorative history of the Bangor Public Library was published. It listed the names of all contributors to the building project, ensuring that every contributor was honored by name. No interior spaces are named for donors, although trees that are planted as part of the landscaping program may be named.

Clearwater Public Library, Clearwater Florida

In 1915, the Clearwater Public Library (FLA) opened its doors. A Carnegie grant, supplemented by municipal government funding, covered the building project costs. The original library remained in service, with additions and renovations, until July 2002, when the voters authorized the issuance of a \$20.2 million bond to construct a new building on the site. Today the Clearwater Public Libraries boasts a stunning new Main Library facility overlooking Clearwater Harbor, designed by Robert A.M. Stern Architects and dedicated in 2004. In addition, there are four branch libraries; the most recent one opened in 2003.

Unlike the other cities in this report, Clearwater is not shaped by a large state university presence or population of students. It is one of three cities that constitute the Tampa Bay Area and has a population of 108,787. Clearwater has many tourists and part-time “winter” residents. The city has been fortunate to have permanent residents of fame and wealth who contribute to civic causes and support the public libraries. These include the owner of the Domino’s pizza chain, and Dean Young, the creator of Blondie and Dagwood. Dean Young spearheaded a campaign for public support in the 1980’s for the construction of the first two branch libraries. A mural on the fourth floor of the Main Library (positioned at the entrance to the Library Foundation’s office) is in honor of Mr. Young.

Clearwater has a City Council-Manager form of government and the Clearwater Public Libraries make up a City department. The Library Advisory Board is appointed by the City Council. The median family income of \$46,228 is significantly lower than other communities in this report and the Hispanic population is higher. The worldwide headquarters of the Church of Scientology is located in Clearwater, despite the city government opposing its presence in the community. There is a contentious relationship between the City and the Church as no taxes are paid by the Church on its sprawling 40+ building complex.

The Clearwater Public Libraries have grown with the assistance of city funding, millage, renewal of a one cent sales tax called “Pennies for Pinellas” and private support. The new 90,000 square foot Main Library was built through a combination of public /private dollars. The City contributed \$20.2 million (mostly “Pennies for Pinellas funds) and the private sector pledged \$5 million for construction, furnishings and collections. Long-time residents Jack Eckerd and his wife Ruth (owners of the chain Eckerd Drugs) helped fund the new Main Library building. Ruth Eckerd donated \$2 million towards project costs for the new Main Library. She challenged city residents to act by matching any gifts of \$25,000 “dollar for dollar.” Another \$2.3 million was raised by the Clearwater Public Library Foundation and volunteers. The children’s area is named for Ruth and Jack Eckerd and a plaque is placed in that space to acknowledge them. Other interior spaces display names of individual benefactors on plaques.

The Clearwater Public Library Foundation was established in 1984. The Executive Director, Judith Melges, explained that naming opportunities for interior spaces were used in the building campaign. However, before this campaign, a precedent had been set. An addition to the old library was named the Adler Addition for benefactors Mr. and Mrs. William Adler who donated \$500,000 towards its construction. The Library also hosts the annual Adler Literary Arts Festival, an event funded by the same couple.

Conclusion

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