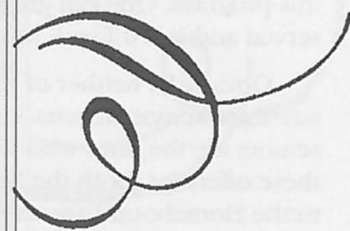


## STEWARDSHIP - PR STAR OF LIBRARY ADVANCEMENT

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### INTRODUCTION

Stewardship, a close relative of donor/prospect cultivation, is the ongoing appreciation and provision of information to benefactors and a critical element in institutional advancement. But stewardship is more than appreciation and information. For it to be as effective as possible for library advancement, it must be packaged as public relations at its best. As Robert Wedgeworth indicates throughout his article entitled "Donor Relations as Public Relations...,"<sup>1</sup> there is an inextricable link between stewardship and public relations. At the University Libraries of Notre Dame, we recognized this some years ago and began to take measured steps toward a comprehensive stewardship package. Our journey is not complete, nor has it been perfectly executed. But our progress has been good and largely effective, and we are vigilant in honing the former and eliminating the obstacles to the latter.

### THE COMPONENTS OF STEWARDSHIP AT THE UNIVERSITY LIBRARIES OF NOTRE DAME

The following describes various stewardship initiatives at the University Libraries that the author feels are conducted in a way different from approaches generally found in other libraries. It therefore excludes such established mainstays of stewardship as exhibits showcasing collections provided or underwritten by donors, websites featuring those collections, exhibit opening receptions, lecture or publication series honoring a benefactor, etc.

#### I. Ongoing stewardship initiatives

- **Access: News from the University Libraries of Notre Dame.** Launched in fall 1979 as a library newsletter to inform the Notre Dame campus of new developments in the University Libraries, *Access: News from the University Libraries of Notre Dame* has evolved into a vehicle to inform the Libraries' readership of issues in library and information science, which are then translated back into the local context. *Access* is distributed twice annually to the University community, Notre Dame's Board of Trustees, the Advisory Council for Univer-

sity Libraries, member libraries of the Association of Research Libraries, the Libraries' friends and benefactors, and selected others. The publication (from 1994 onward) may be found on the web at: <http://www.nd.edu/~ladvance/access/accessindex.html>. A project to scan earlier issues and mount them on the web is currently underway.

- **Gift Acknowledgment.** The Libraries take care to acknowledge gifts of all kinds via letters under the signature of the director of libraries and others. For gifts of books, the Gifts and Sales unit generates letters bearing the director's signature. Gifts to the Department of Special Collections receive an acknowledgment from the curator and the director of libraries. Letters bearing the signature of the director of libraries, with many customized to reflect the specific gift or situation surrounding the benefaction acknowledges all monetary gifts. Concurrently, donors are added to the *Access* mailing list.

- **Bookplates.** Bookplates, bearing artwork customized to each endowment of \$100,000 and above, and approved by the donor(s), are placed in books acquired with interest earned from endowment principal. (Artwork will be discussed in greater detail in the "bi-annual" section of this article).

- **Library Advancement Website.** A library advancement website, <http://www.nd.edu/~ladvance/>, a section of which is devoted to the stewardship of gifts falling into the Endowed Library Collections Program, is maintained.<sup>2</sup> On it, a listing of dedicated library endowments provides links to individual pages reiterating the name of the endowment, providing a representation of the graphic, a biographical sketch of the donor(s), and supplying a statement describing how the benefaction is being used. A link by year of "Selected Acquisitions," provides yet another view of the many benefits of each individual gift (with the term "selected" deferring potential controversial acquisitions for a debate not related to the stewardship environment).

## II. Annual stewardship initiatives

### • **Advisory Council for University Libraries.**

A group of business and professional people from throughout the United States, the Advisory Council for University Libraries (ACUL) membership, some 40-plus persons strong, meets periodically to learn about the Libraries and advocate their cause.<sup>3</sup>

Appointed by the University president on the basis of their commitment to Notre Dame (a large number are alumni) and experiential savvy, the ACUL also serves as a significant donor base for the Libraries. As such, every interaction with each member serves as a significant stewardship/public relations opportunity for us, one in which we can show our appreciation for the good will that has been bestowed upon the Libraries by individual members as well as by the group as a whole, share accomplishments, discuss challenges and concerns, and mutually plan strategies for the Libraries' advancement.

Thus, the Libraries' single most important stewardship opportunity occurs annually every fall, in conjunction with a football weekend, at which time the ACUL convenes for three days of meetings, meals, and recreational events. The "meeting" generally begins with a dinner on Thursday evening with guests who usually include presenters scheduled for the next day. This is followed by a full Friday schedule including breakfast; a morning session featuring speakers and topics dealing with timely library and information issues as well as University concerns; lunch, with speeches by both Provost and President; an afternoon session; and dinner with guests of interest to the Council. Saturday's fare includes an early morning Mass, a pre-game brunch, and, of course, the much-anticipated football game.

Needless to say, throughout all of this, the Libraries are not always the central or ongoing focus. What is central and ongoing is a process of hospitality, of thankfulness for the Council's presence, of information and problem sharing, of relationship building, and of our projecting the best level of public relations of which we are capable.

The Libraries host a second annual meeting for the ACUL in the spring, this time in conjunction with the ever popular "blue-gold" football game, at which time members of the Notre Dame football team play each other as a demonstration of things to come in the upcoming season. The schedule is roughly the same as for the fall sessions, but the programs are on a considerably smaller scale as participation is not mandatory for Council members and only about half of the membership chooses to attend the spring meeting.

### • **Library Endowment Stewardship Reports.**

Another joint venture between the Development Department of the University and the University

Libraries, the library endowment stewardship reports were launched in 1999 as a vehicle used to steward library endowments with principals in excess of \$50,000, with activated spending accounts and living donors, including close or distant relatives, foundations, corporations, and other philanthropic entities. This process is another extremely important annual stewardship and public relations event for the Libraries, and when complete, each "library report" includes: a copy of the latest University endowment brochure, which speaks to the importance of endowment support to Notre Dame and graphically charts the growth of endowment principal; a statistical report on the growth of each specific endowment over the years; a letter from the director of libraries on the state of the University Libraries containing an articulation of current goals and challenges; and a letter from the individual spending account's fund manager.

The University's Development Department and University Accounting supply the first two documents, respectively. The director's letter is self-explanatory. The personal letter to donors is written by librarians in response to a list of endowment names appropriate for inclusion sent to them by the Library Advancement Office. For unrestricted endowment, the library advancement officer on behalf of the faculty and staff of the University Libraries writes the donor letter. In it, she articulates the progress made in resources, programs and services over the past year and expresses the Libraries' gratitude to the specific endowment for making this progress a reality.

Before launching the program, the advancement officer offered several one-hour sessions to discuss the process and answer any questions fund managers might have. While the sessions were well attended, not everyone showed up. As a follow-up, and every year thereafter at the beginning of the process, an email has been sent to each participant. It includes: sources for locating information on each donor, e.g., the advancement website, or the Advancement Office for endowments not yet dedicated and placed online, and some ideas regarding what each letter might contain. This includes: an introduction (for relationships not yet underway); background/framework for the area toward which the endowment is focused in terms of pedagogy, faculty research, collections, or any kind of special interest factors which might prevail; and an indication of how the fund in question has moved any of these forward. Stressing the difference between these communications and the concepts contained in a case statement for endowment support which emphasizes needs and what could be achieved with enhanced funding, fund managers are asked to stress the positive and thankful aspects exclusively and to focus on information, progress, enablements provided by each gift, and

gratitude. They are also encouraged to discuss their professional contributions in terms of how they impact the discipline served by the endowment, and to make themselves available for tours, lunches, dinners, and/or to feel free to invite "their" donors to lectures, exhibits, conferences and other relevant gatherings at the University.

### III. Bi-annual stewardship initiatives

**Library endowment dedications.** When an endowment, or major gift falling into the "Endowed Library Collection Program" is funded at the level of 70 percent or above, the Libraries and the Development Department take steps to officially name the gift and design artwork which meets the donor's specifications. This is a process as simple or as complex as any individual donor wishes to make it, and we collectively respond as flexibly as we can to this public relations opportunity to do something truly meaningful for every benefactor. Upon the finalization of a graphic, the Libraries acquire two (this number sometimes varies, depending on whether there is an extra library location in which a plaque is to be placed) 11" x 16" hand-engraved brass and walnut plaques bearing this artwork. Where appropriate, corresponding acid-free bookplates are also generated. In conjunction with the Development Department, we also work through the meticulous plans for dedication ceremonies, which are held every other year on the Thursday of the Advisory Council weekend described above.

Plaques are mounted in the Theodore M. Hesburgh, C.S.C., Library concourse and other locations, as necessary, prior to the dedication. Dedication ceremonies begin with a lunch for the donor families, to whom we extend as many invitations as necessary. This is followed by library tours<sup>4</sup> and a dedication Mass, during which time the plaques to be presented to the donor family are blessed. A celebratory dinner follows. With the provost acting as master of ceremonies, plaques are presented to each donor family, each of whom is given an opportunity to select a representative to address the group. The brief speeches that result (we enforce time restrictions, which we set according to the number of endowments to be dedicated) are the highlight of the event, and as each person articulates the reason for the gift to the University and its Libraries, the spirit of commitment to a common cause becomes palpable throughout the room. Speeches by the University president and the director of libraries follow. The evening is concluded with a memento for all – an exquisitely executed booklet of single-page descriptions of all endowments in the program, complete with a replica of the artwork for each plaque. News of the dedications is distributed via press release, library and University newsletters, and other media.

Of course, this booklet is not just an effective

stewardship vehicle. It has proven itself to be an immensely effective tool in the cultivation, marketing, and public relations arenas as well. As new endowments and significant one-time gifts are added every two years, so is the donor biographical information edited for currency. Plans are now underway to refresh the library application statements, as necessary, for the fall 2003 dedication ceremonies.

Needless to say, the process just described is costly and labor-intensive. Is it worth it? Definitely. And, the public relations aspects of it are never finished. When donors contact us via our web site to point out biographical corrections (yes, they do sign off on the bios prior to publication), we are happy that they have visited our site and do the corrections immediately, and make a note to do the same for the next paper edition. When we receive requests to re-do plaque artwork in response to any one of many of life's events, we do so with a smile. And when, on a bright and sunny day we notice buckling or warping, we contact our vendor and he does whatever is necessary to fix the problem. That's public relations, and we are happy to have so many representations of good will toward the Libraries to maintain.

### IV. Special Public Relations Opportunities: Milestone Events

In 1993, the Libraries commenced upon a year of celebration commemorating their growth, the 30<sup>th</sup> anniversary of the construction of the Theodore M. Hesburgh, C.S.C., Library, and showcasing the changing aspects of librarianship and information and their potential effects on the profession and the community of scholars. "Two Million and 30 Reasons to Celebrate" was underwritten in part by the Advisory Council for University Libraries and sponsored by the then active Friends of the Library of Notre Dame.<sup>5</sup> The social, religious, and scholarly events of the celebration presented a unique opportunity for the Libraries to make known their function, challenges, and place in the academy to the Notre Dame community and beyond.

A calendar of events for the celebration, detailing dates, times, a brief description of the event, and location was generated in high-quality flyer format and placed in the issue of *Access* preceding the celebratory year. An article appeared on its verso which described the year's inaugural event, a Friends' dinner at which the official two-millionth and two-millionth-and-first volumes were presented and Father Hesburgh reflected on the first 30 years of the library bearing his name. For historical purposes, issue number 58, September 1994, of *Access* was devoted to a recapping of all the events. Its text may be found at <http://www.nd.edu/~ladvance/access/issues/indexsept94.htm>.

There were three permanent and tangible mementos of the event. The first was an official two-millionth

volume to the collection entitled *Index preclare dictorum*, a rare 1518 imprint from Abbott Astrik L. Gabriel's private collection and the first of a four-volume set of the collected works of medieval theologian Jean Gerson, chancellor of the Cathedral of Notre Dame and the University of Paris. The second, an official two-millionth and first "volume," which was not a book at all, but an optical disc selected to represent the changing face of information as well as its traditional past; the *Oxford English Dictionary, Second Edition*, on CD-ROM, was networked on the Libraries' local area network for five simultaneous users. And third, was *What is Written Remains: Historical Essays on the Libraries of Notre Dame*,<sup>6</sup> a book containing the first systematic account of certain facets of the Libraries' development and long-forgotten episodes illuminating not only our past, but also that of the University.

At this writing, the Hesburgh Library is beginning a lengthy renovation, and is making plans to celebrate its 40<sup>th</sup> birthday and the Libraries' fast approaching three million volumes with another series of events aimed at showcasing the centrality of libraries everywhere. We are looking at a slightly different format from the first, in that we shall be celebrating (translation: making visible and central) the Libraries on a continuum. Events including lectures featuring prominent speakers, receptions, celebratory Masses, alone and in conjunction with various corporate/foundation sponsorship, will be tied together with a catchy "brand name": "Story times [however many years the Hesburgh Library has been in existence, currently, 39]". Our 1993 effort was a public relations success; we are hoping that the same will obtain for our upcoming ongoing celebration.

## V. Initiatives Under Development

Two stewardship initiatives are currently in varying stages of conceptualization at the University Libraries:

- The development of a local (59X) field to be included in bibliographic records for materials ordered on endowment earnings or expendable gift funds which would include standardized information for the purposes of donor recognition and for record retrieval by keyword search based on donor related data in the online public catalog.
- Recognizing that significant gifts without endowments uniformly rather than situationally require the same kind of continuous stewardship connectivity between fund manager and donor as endowments, we are looking at ways to make this happen. At this writing, we are evaluating the merits of a process more "organic" than the highly structured "library reports," one in which the idea of writing/interacting in regard to a fund would come from the Advancement Office, but the actualization would come from each fund manager on whatever continuum might be comfortable for him or her.

A critical element in ongoing stewardship initiatives in the Libraries, the first of these undertakings will require extensive technological adaptations in the online system, along with training of personnel. The second must be implemented along with a professional culture change at the Libraries and the realization that we must develop new expectations of ourselves as times and environments change. In order to keep our donor bases expanding, we must assume new stewardship tasks, all the while looking to see what tasks from the past can be dropped in order to accommodate them in our new workflow.

## VI. The Importance of the Library Director

The importance of our director of libraries in stewardship/public relations efforts cannot be stressed too emphatically. As the public face of the Libraries, the Director must be committed to stewardship and to the public relation initiatives that are seen by those at whom these initiatives are aimed. It is the director's role to create an environment supportive of risk-taking in testing the viability of new approaches to stewardship and public relations, to provide counsel and enablement upon request, and to participate visibly and fully in any undertaking determined worthy of implementation.

## VII. The Importance of Partnerships and Collaborative Initiatives

The partnership between the University Libraries and Notre Dame's Development Department has evolved over a number of years. It is a strong and productive collaboration, where ideas and information are shared, where goals and tasks are jointly set and executed, with each entity enhancing the other by virtue of its particular strengths and talents.

## CONCLUSION

Library advancement has now been a formal entity within the University Libraries of Notre Dame for a decade. When we began our journey, we did not realize how it would evolve, and that there would essentially be no end to our learning process, nor to the possibilities for us to pursue. We look forward to the challenges and collaborations of the future.

## NOTES

<sup>1</sup> Robert Wedgeworth, "Donor Relations as Public Relations: Toward a Philosophy of Fund-Raising," *Library Trends* 48 (Winter 2000): 530.

<sup>2</sup> This enormously successful fundraising strategy began at Notre Dame when its libraries received their first endowment in 1922, but did not take "hold" until well into the 1980s, when it began to be aggressively marketed as a program with clearly defined characteristics

and appealing stewardship components. Interestingly, this clarity did not extend to the name of the program, which, in actuality, solicits funds not only for collections, but also for programs, services, and a broad spectrum of other initiatives as well.

During cultivation, a prospect is presented with a selection of brief but carefully articulated case statements outlining the Libraries' needs that have been translated into giving opportunities in areas of interest to the prospect. Once the prospect has made a selection, or has presented a counterproposal – which, recognizing the fact that giving is highly donor-driven, the Libraries make every effort to accommodate – a payment schedule is negotiated. Given the size of the minimum commitment for this program (\$100,000), this often takes the form of a ten-year pledge.

As a result of the stewardship/public relations initiatives described in this article, the “endowed collections” program has enjoyed steady growth. In 1960 there were six named endowments. By 1980, they had grown to 27. In 1990, there were 76, and by 1993, the number had grown to 89. The fall of 1995 saw the dedication of 14 new library endowments and in the fall of 1997, 22 additional plaques were added to the marble wall of the Hesburgh Library concourse. In his annual letter to donors of November 1996, the then director of libraries cited 123 separate library endowment accounts for the 1995-96 fiscal year, from which \$1.2 million in expendable income was produced for the Libraries. In a report to the Academic Council of the University dated March 27, 2002, Jennifer A. Younger, Edward H. Arnold Director of University Libraries, cited 167 endowments with earnings of over \$2 million.

<sup>3</sup> The Advisory Council membership also has two rotating (two-year term) positions for an “under 30” member category. These are reserved for recent University graduates manifesting the same characteristics of commitment to Notre Dame, business/professional orientation, and the foreshadowing of a humanistic/philanthropic bent. Frequently, library faculty and staff, who have gotten to know them over the course of their four undergraduate years as student workers, recommend these members. The program has worked so well that several “under-30s” have remained on the Council as full-fledged ACUL members.

<sup>4</sup> The success of the stewardship program letters from fund managers has resulted in another positive public relations step – the invitation of fund managers to all dedication meals and ceremonies. At the fall 2001 dedication it was also the fund managers who gave special tours, based on commonly shared interests and subject areas, to “their” donor families.

<sup>5</sup> Based on national trends begun some five years before and substantiated via questionnaire at the 1998 annual meeting of Development Officers of Academic

and Research Libraries (DORAL) held on March 19 - 21, at the University of California at Berkeley, the University Libraries that same year proposed the dissolution and reconfiguration of the Friends of the Library at Notre Dame as a formal entity/organization. Furthermore, they proposed that in place of the Friends, all persons who make the University Libraries the focus of their charitable giving be designated “friends.” As such, they would be incorporated into the Libraries' information-dissemination structure including the receipt of the *Access* newsletter, periodic state-of-the-Libraries mailings, and program and special events announcements. There would no longer be a formal organization to join, or a minimum giving level requirement. Other parameters of the proposal, which was passed by the Friends' Board and is now standard operating practice at the Libraries, are available from the author upon request.

<sup>6</sup> Maureen Gleason and Katharina J. Blackstead, eds. *What is Written Remains: Historical Essays on the Libraries of Notre Dame*. Notre Dame: University of Notre Dame Press, 1994.

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