



Cedar Rapids Public Library Foundation
Strategic Plan for Fiscal Years 2012 through 2014
Approved by the Board of Directors
June 7, 2011

Cedar Rapids Public Library	Cedar Rapids Public Library Foundation
Mission Statement: Who we are	
<p>The Cedar Rapids Public Library is a passionate advocate for literacy and lifelong learning.</p> <p style="text-align: right;">(adopted 4/2011)</p>	<p>The Cedar Rapids Public Library Foundation secures resources in order to enhance and enrich library programs, services, and facilities not normally met by public funding.</p> <p style="text-align: right;">(adopted 5/2009)</p>
Vision Statement: What we do	
<p>The Cedar Rapids Public Library exists to impact our community and transform its quality of life through education, civic engagement, the arts, and entertainment.</p> <p style="text-align: right;">(adopted 4/2011)</p>	<p>The Cedar Rapids Public Library Foundation advocates for and provides a reliable and growing funding source so that the library may impact our community and transform its quality of life through education, civic engagement, the arts, and entertainment.</p> <p style="text-align: right;">(adopted 5/2011)</p>

**Three-year Goals, Strategies and Objectives
Fiscal Years 2012, 2013 & 2014
(July 1, 2011 through June 30, 2014)**

I. Goal: Raise the private funds necessary for the library to rebuild itself in downtown Cedar Rapids on 21st century terms, leaving a legacy for future generations.

A. Strategy: Conduct a successful capital campaign raising a minimum of \$7 million for the new library project and \$1 million to strengthen the endowment.

FY12 Objectives:

1. Conclude the Library 3.0 capital campaign.
2. Learn from ME&V's post-campaign analysis/report to best leverage the success of the campaign.
3. Continue pledge payment collection.

FY13 Objectives:

1. Identify and take advantage of public relations opportunities to transform attitudes and perceptions about the ongoing role of private fundraising in the library's future.
2. Continue pledge payment collection.

FY14 Objectives:

1. Continue to transform attitudes and perceptions about the ongoing role of private fundraising in the library's future.
2. Continue pledge payment collection.

B. Strategy: Provide excellent donor stewardship, informing campaign donors of building progress and cultivating relationships, keeping donors connected to their investment and our mission.

FY12 Objectives:

1. Assist the library in promoting and organizing a groundbreaking celebration.
2. Increase information sharing through press releases, FOCUS newsletter, website and Facebook.
3. Hold Library 3.0 celebration event for volunteers at conclusion of the campaign.

FY13 Objectives:

1. Continue information sharing through press releases, FOCUS newsletter, website and Facebook.
2. Ensure the integrity of donor recognition and naming opportunities in the new facility.
3. Hold Library 3.0 celebration event for volunteers at conclusion of campaign.

FY14 Objectives:

1. Assist the library in promoting and organizing the grand opening celebration.
2. Host a Library 3.0 donor event approximately six months after grand opening to celebrate early success.
3. Continue information sharing through press releases, FOCUS newsletter, website and Facebook.

II. Goal: Define the role of private support in the library's annual operating budget so that support from the Foundation will allow the library to achieve maximum community.

A. Strategy: Clarify and improve the current allocation of the Foundation's reimbursements and donations in the revenue portion of the library's budget.

FY12 Objectives:

1. Work with the library director to better represent Foundation support in library's monthly income statements reviewed by the board of trustees.
2. Develop and implement a monthly reconciliation process between the Foundation and City Finance to ensure accuracy of reports.

FY13 Objective:

1. Continue to implement the monthly reconciliation process.

FY14 Objective:

1. Continue to implement the monthly reconciliation process.

B. Strategy: Work with the library director and BOT finance committee to set contribution revenue goals that match measurable library program expenses each year.

FY12 Objectives:

1. Clarify the timeline for setting the library's annual budget and participate in the process as appropriate for FY13.
2. Understand and report to the Foundation board of directors the library's FY13 programming goals that would benefit most from additional private support.
3. Board votes on programs to support in FY13 by the April 2012 board meeting.
4. Incorporate the expense of this library support in the Foundations' FY13 budget.

FY13 Objectives:

1. Participate in the library's annual budget setting process as appropriate for FY14.
2. Understand and report to the Foundation board of directors the library's FY14 programming goals that would benefit most from additional private support.
3. Board votes on programs to support in FY14 by the April 2013 board meeting.
4. Incorporate the expense of this library support in the Foundations' FY14 budget.

FY14 Objectives:

1. Participate in the library's annual budget setting process as appropriate for FY15.
2. Understand and report to the Foundation board of directors the library's FY15 programming goals that would benefit most from additional private support.
3. Board votes on programs to support in FY15 by the April 2014 board meeting.
4. Incorporate the expense of this library support in the Foundations' FY15 budget.

C. Strategy: Approve the contribution revenue line item in library's annual budget before it is brought to the library board of trustees for approval.

FY12 Objectives:

1. Clarify the timeline for setting the library's annual budget (as in Goal 2, Strategy B., FY12 Objective 1).

2. Board of directors approves total annual contributions line in the library's FY13 budget one month prior to the board of trustees' budget approval meeting.

FY13 Objectives:

1. Board of directors approves total annual contributions line in the library's FY14 budget one month prior to the board of trustees' budget approval meeting.

FY13 Objectives:

1. Board of directors approves total annual contributions line in the library's FY15 budget one month prior to the board of trustees' budget approval meeting.

- D. Strategy:** Develop and execute a Memorandum of Understanding with the City of Cedar Rapids ensuring a stable source of public funding for the library even as revenue from private contributions increases.

FY12 Objectives:

1. Gather samples and advice from other library foundations.
2. Develop a plan for approaching the City with the framework of an agreement in FY13.

FY13 Objectives:

1. Implement plan for approaching the City with the framework for a proposed agreement.
2. Finalize Memorandum of Understanding to begin in FY14.
3. Develop a reporting system between City and the Foundation to measure accountability of both parties.

FY14 Objectives

1. Uphold the terms of the Memorandum of Understanding for which the Foundation is responsible.
2. Implement the reporting system between the City and the Foundation.

- III. Goal:** Secure and distribute the financial resources needed to measurably improve library service each year and sustain the library as a high-quality community resource.

- A. Strategy:** Incorporate an annual work plan into the annual budgeting process for board approval so that fundraising activities are clearly tied to budgetary goals and the strategic plan.

FY12 Objectives:

1. Discuss and approve the FY12 annual work plan at the July board meeting after the FY12 budget has been approved.
2. Include progress updates based on the monthly goals of the annual work plan in monthly board packets.

FY13 Objectives:

1. Discuss and approve the FY13 annual work plan at the July board meeting after the FY13 budget has been approved.
2. Include progress updates based on the monthly goals of the annual work plan in monthly board packets.

FY14 Objectives:

1. Discuss and approve the FY14 annual work plan at the July board meeting after the FY14 budget has been approved.

2. Include progress updates based on the monthly goals of the annual work plan in monthly board packets.

B. Strategy: Increase private fundraising in support of annual library service.

FY13 Objectives:

1. Develop and implement fundraising plan to support special projects that will be funded by the Foundation as a library support expense in FY13 (See Goal II, Strategy B, FY12 objectives 3 and 4).

FY14 Objectives:

1. Develop and implement fundraising plan to support special projects that will be funded by the Foundation as a library support expense in FY14 (See Goal II, Strategy B, FY13 objectives 3 and 4).
2. Develop and implement a fundraising plan to raise additional funds necessary to meet the requirements of the Memorandum of Understanding with the City (See Goal II, Strategy D, FY14 objective 1).

C. Strategy: Increase the number of people who have included the Foundation in their estate plans.

FY12 Objectives:

1. Gather samples of planned giving strategies from other nonprofits and library foundations.
2. Develop a comprehensive planned giving strategy.

FY13 Objectives:

1. Implement the planned giving strategy and track results.
2. Recognize participants publically, in accordance with the planned giving plan.

FY14 Objectives:

1. Adjust planned giving strategy based on results.
2. Continue implementation and results tracking.

IV. Goal: Develop the resources necessary to grow the capacity of the Foundation and broaden the Foundation's ability to advocate for the library.

A. Strategy: Strengthen the board of directors.

FY12 Objectives:

1. Implement board recruitment strategy.
2. Recruit a new board member to fill the position for which the second term expired in 6/2011.
3. Recruit new board member(s) to fill position(s) for which second term(s) will expire in 6/2012.
4. Create a board orientation packet and process.
5. Develop a board review/evaluation process.

FY13 Objectives:

1. Implement board recruitment strategy.
2. Recruit new board member(s) to fill position(s) for which second term(s) will expire in 6/2013.
3. Consider increasing the number of board positions to more than 10.
4. Implement board review/evaluation process.

FY14 Objectives:

1. Implement board recruitment strategy.
2. Recruit new board member(s) to fill position(s) for which second term(s) will expire in 6/2014.
3. Consider increasing the number of board positions to full capacity (13).
4. Implement board review/evaluation process.
5. Establish a process and update the strategic plan for another three years.

B. Strategy: Continue to strengthen strategic alliances within the library community: Friends, library staff, board of trustees.

FY12 Objectives:

1. Continue to partner with Friends on FOCUS quarterly newsletter.
2. Executive director or Foundation representative will continue to attend all board meetings of the Friends and board of trustees.
3. Executive director will attend board of trustees leadership team meetings and other committee meetings of the BOT as each committee deems appropriate.
4. Continue to partner with Friends to maintain a presence at Farmers' Markets.

FY13 Objectives:

1. The Foundation will share findings with Friends as we define the role of private support in the library's annual operating budget as planned in Goal II.
2. Identify new ways to partner with Friends to support new fundraising initiatives for special projects.
3. Continue to partner with Friends on FOCUS quarterly newsletter.
4. Executive director or Foundation representative will continue to attend all board meetings of the Friends and board of trustees.

5. Executive director will attend board of trustees leadership team meetings and other committee meetings of the BOT as each committee deems appropriate.
6. Continue to partner with Friends to maintain a presence at Farmers' Markets.

FY14 Objectives:

1. Identify new ways to partner with Friends to support new fundraising initiatives for special projects.
2. Continue to partner with Friends on FOCUS quarterly newsletter.
3. Executive director or Foundation representative will continue to attend all board meetings of the Friends and board of trustees.
4. Executive director will attend board of trustees leadership team meetings and other committee meetings of the BOT as each committee deems appropriate.
5. Continue to partner with Friends to maintain a presence at Farmers' Markets.

C. Strategy: Recruit, support and invest in staff

FY12 Objectives:

1. Allocate budget for staff training and professional development opportunities.
2. Determine if the Foundation's accountant should be a member of the Foundation staff or continue as a contract laborer.
3. Conduct an annual review for all Foundation staff during their month of hire.

FY13 Objective:

1. Consider making the part-time temporary campaign administrative assistant position a permanent position (temporary position envisioned until 10/2012).
2. Allocate budget for staff training and professional development opportunities.
3. Conduct an annual review for all Foundation staff during their month of hire.

FY14 Objective:

1. Allocate budget for staff training and professional development opportunities.
2. Conduct an annual review for all Foundation staff during their month of hire.

D. Strategy: Integrate, assess and invest in technology to enhance fundraising and administrative effectiveness.

FY12 Objective:

1. Launch new Foundation web page in conjunction with the library's new website.
2. Conduct a technology assessment resulting in prioritized recommendations to be accomplished over a three-year period.

FY13 Objectives:

1. Allocate budget for new hardware (computers, printers, projectors, etc.).
2. Implement recommendations from the technology assessment.
3. Identify new opportunities to better integrate technology in future years.

FY14 Objectives:

1. Allocate budget for new hardware (computers, printers, projectors, etc.).
2. Implement recommendations from the technology assessment.
3. Identify new opportunities to better integrate technology in future years.