

A Tale of Two Cities: Marketing and Development Strategies in Different Library Environments



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Mark Stover, California State University, Northridge

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Presentation outline

- **Learning outcomes**
- **University and Library environments**
- **Marketing**
- **University strategic plans**
- **Development strategies**
- **Fundraising**
- **Takeaways**

Learning outcomes

- **Learning objective #1:** Attendees will learn—or be reminded—that one size largely does not fit all when it comes to marketing and development.
- **Learning objective #2:** Attendees will be able to identify and apply marketing and development strategies tailored to these exemplar types of libraries.
- **Learning objective #3:** Through participant discussion, attendees will discover tips and techniques for successful marketing and fundraising in a variety of library environments.



Environment: The University

- **CSUN Founded 1958**
- **40,000 students (36,000 undergrads)**
- **2,000 faculty**
- **2,500 staff**
- **300,000 alumni**
- **Part of the CSU system of 23 campuses**
- **9 schools**
- **68 undergraduate degrees offered**
- **74 graduate and professional degrees offered (including teaching credentials)**

Environment: The Oviatt Library

- **5 stories (plus 2 wings) in Main Library**
- **234,712 total usable square feet**
- **90 staff; 140 FTE including students**
- **91 service hours per week**
- **1.4 million titles**
- **\$9 million annual budget**



NORTHWESTERN UNIVERSITY
LIBRARY

Environment: The University

- **Founded 1851**
- **16,000 students, equally graduate and undergrad**
- **2,500 faculty**
- **4,500 staff**
- **225,000 alumni**
- **3 campuses: Evanston, Chicago, and Qatar**
- **12 schools**
- **124 undergraduate degrees offered**
- **145 graduate and professional degrees offered**

Environment: The Library

- **3 towers/6 stories in Main Library**
- **4 additional library buildings on three campuses**
- **559,005 total usable square feet**
- **232 staff; 300 FTE including students**
- **124 service hours per week**
- **6.3 million titles**

Marketing

- **University strategic plan**
- **University marketing and the Library**
- **Library Marketing Team**
- **Library brand(s)**
- **Promotional items**
- **Publications**
- **Strategic events**
- **Online presence**

University Strategic Plan

- Increase student success
- Focus on employees for success
- Raise visibility and reputation of the university
- Plan for a future less dependent on state funding
- Increase research activity
- Increase sustainability
- Use athletics as a tool for engagement

University Marketing and the Library

- **No sub-brands!**
- **VISCOM, but**
- **University Marketing and Communication will assist with projects as needed**
- **WebOne issues**

CSUN Library Marketing Team

- **Projects and Programs Coordinator**
 - Also works heavily in development, plus graphics designer
- **Library Dean**
- **Library Director of Development**
- **Executive Assistant to the Dean**
 - coordinates all press releases
- **Outreach Librarian**
- **Associate Dean**
- **First Year Experience Librarian**
 - coordinates social media
- **Library Web Services Coordinator**
 - coordinates all website marketing
- **Web Programmer**

Goals for the Marketing Team

- **Remind all members to see marketing and PR as integrally connected to fundraising**
 - **Some members are librarians who don't necessarily appreciate the nuances of fundraising**
- **Work on continuing marketing projects and special marketing initiatives**
- **Remind members of the team that marketing:**
 - **Builds a foundation for development**
 - **Friend raising**
 - **Creates a higher profile for the Library**

Potential drawbacks to marketing

- **When good public relations alienates traditional donors or potential donors**
- **Examples:**
 - **Weeding project**
 - **Coffeehouse**
 - **Learning Commons**

CSUN Library Brands

CSUN
SHINE

SHARE
THE COMMONS
EXPERIENCE



California State University
Northridge

SOAR

ScholarWorks

CSUN Library Promotional items



CSUN Library Publications



Northridge eNews
A Hot New Trend is Brewing
When it comes to designing the interior space of a modern academic library, the presence of a conference room is quickly becoming the new norm. Thanks to the President Dr. CSUN David A. Anderson.

What's Up
Curator and Archivist Kelley Kline talks about the Library's new exhibit and shares some of her personal connections to California's Call: The Love and the Love of the Golden State.

Oviatt Spotlight
With spring in full swing, we thought it an appropriate time to share some insights into the essential work that is involved in the ongoing care and cultivation of our library garden.

Thanks & Recognition
After 27 years of dedicated service to California State University, Northridge and the Oviatt Library, retired Librarian Kris Eckhard continues to support the impactful work and inspiring legacy of CSUN librarians.

We Would Like to Thank You
CSUN's award-winning Oviatt Library Coordinator, Lucie Menendez, shares about her role in supporting the library's mission and the love of it.

A Message From the Dean

Special Collections & Archives
Oviatt Library
California State University Northridge

OVIATT FRIENDS
Small Books: Big Ideas

OVIATT FRIENDS
Dr. Bonnie J. Dunbar, Retired NASA Astronaut

OVIATT FRIENDS
A Glance Back at Social Protest

The President of the United States was in town for a brief period. The LAPD was determined to prevent protests against the Vietnam War, its own political history, and the presence of protesters in the Century Plaza Hotel. The day the Los Angeles Times headline read "Protesters March on the City" on Sept. 17, 2013, these dissenters, participants in that protest, offered their reflections on that night's events at the official opening of the Oviatt Library's newest exhibition—*Protest: The Struggle for Cultural Change*.

It happened in Century City on June 23, 1967, near the Century Plaza Hotel. The day the Los Angeles Times headline read "Protesters March on the City" on Sept. 17, 2013, these dissenters, participants in that protest, offered their reflections on that night's events at the official opening of the Oviatt Library's newest exhibition—*Protest: The Struggle for Cultural Change*.

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CALIFORNIA STATE UNIVERSITY, NORTHRIDGE

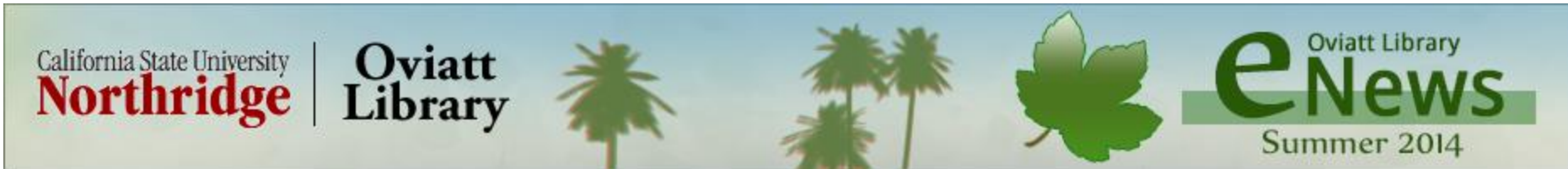
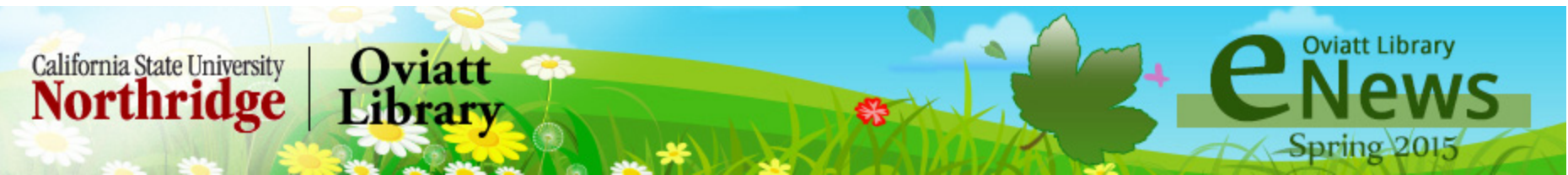
Oviatt Friends
Hands
On China

DELMAR T. OVIATT LIBRARY

OVIATT

California State University Northridge

CSUN Library e-Publications



Strategic Events

- **Grand opening of the Learning Commons**
 - Ribbon cutting
 - Gala reception, speeches, and tours
- **Grand opening of the Gohstand Reading Room**
- **Grand opening of the Special Collections and Archives Renovation**
- **Annual reception for major exhibits**
- **Annual Student Awards Luncheon**
- **Annual lecture series: Sex in the Library**

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Friday, Apr 17

10:45 AM - 5:00 PM



CELEBRATE
NATIONAL LIBRARY WEEK
SHARE ILOVELIBRARIES.ORG
PLAY RE
ENGAGE ELAX Dream CELEBRATE
Register to Win a \$50 gift card!

OneSearch

Find Books, Articles, Media and More - **What is**

More search options:

Marketing

- **University strategic plan**
- **University Relations and Global Marketing Office**
- **Library public relations**
- **Library brand(s)**
- **Promotional items**
- **Publications**
- **Strategic events**
- **Online presence**

University Strategic Plan

DISCOVER

ENGAGE

INTEGRATE

CONNECT

University – Library collaboration

- **“We’re the University, and we’re here to help”**
- **Controlling the message and the medium**
- **Everything is always “NU”**
- **Consistency has its limits**
- **Online challenges**

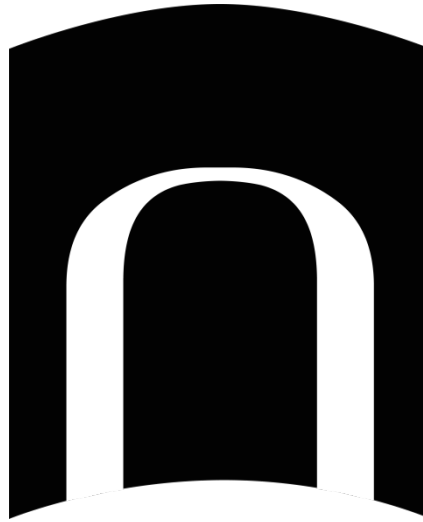
NU Library public relations team

- **Dean of Libraries**
- **Director of Public Relations**
- **Communication Specialist**
- **Library Director of Development**
- **Executive Assistant and admin assistants**
- **Public Services staff (AUL, UX staff, others)**
- **Special Libraries staff (AUL, archivist, others)**
- **Planning & Facilities staff (AUL, others)**

Library marketing: Opportunities and challenges

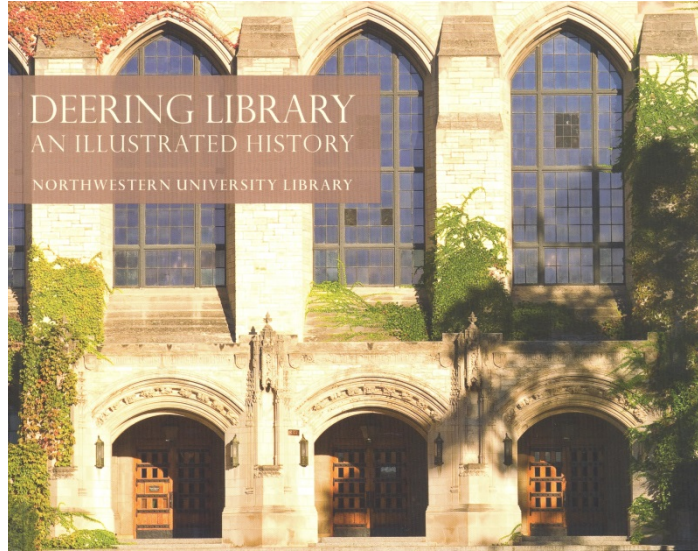
- O Community building within the organization**
 - O Raising awareness of the library and what it's about**
 - O Building respect**
 - O Justifying existence – garnering campus support**
 - O Making connections, including potential donor base**
-
- C Competition**
 - C Human resources**
 - C Keeping it fresh**
 - C Making the right connections**
 - C Selling the vision of the 21st century library**

Northwestern Library brands



NORTHWESTERN UNIVERSITY LIBRARY

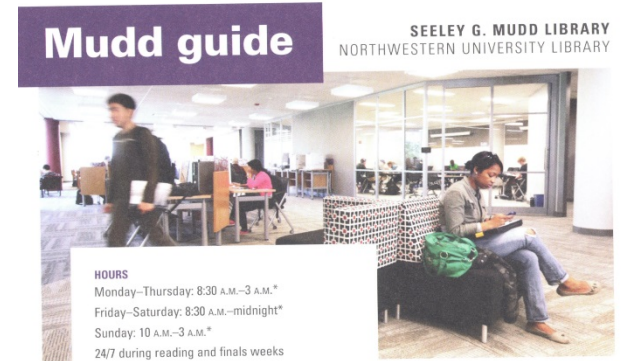
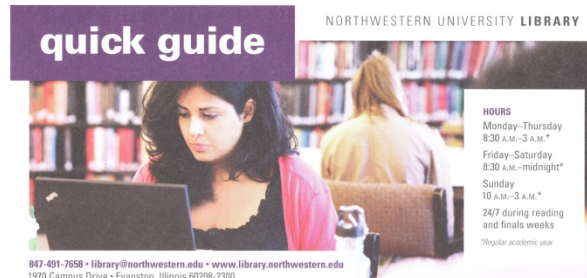
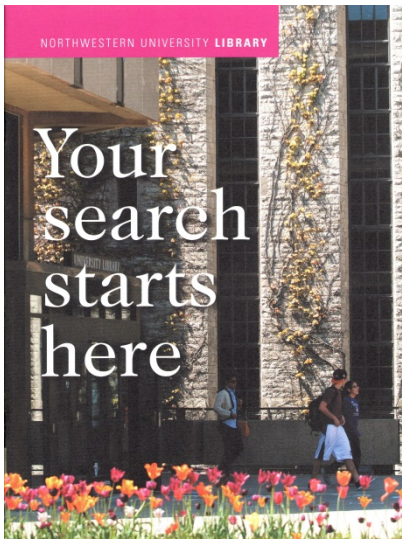
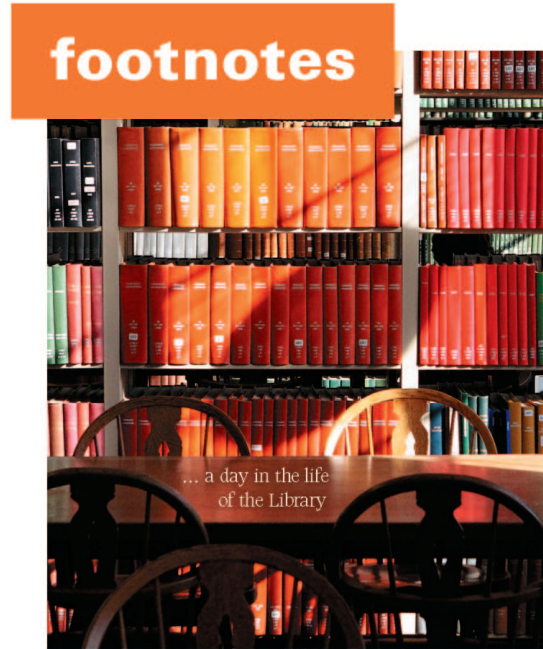
Promotional items



Northwestern Library publications

NORTHWESTERN UNIVERSITY LIBRARY

NORTHWESTERN UNIVERSITY LIBRARY



mudd@northwestern.edu • www.library.northwestern.edu/muddlibrary
 847-491-3361 • 2233 Tech Drive • Evanston, Illinois 60208-3530

Strategic events

- **Robust outreach agenda**
- **Tours**
- **Rotating exhibits and receptions**
- **Speaker series**
- **Staff engagement activities - #teamlibrary**
- **Student worker events**
- **Space as bargaining chip**



NORTHWESTERN
UNIVERSITY

- LIBRARY
- MAPS
- PARKING
- SHUTTLES
- BOOKSTORE
- GIVING

Search Web or P

ADMISSIONS

ACADEMICS

RESEARCH

CAMPUS LIFE

ADMINISTRATION



President: The S of the Universit Strong

"Conversations" event touches
wide range of Northwestern in
and achievements from the pa
year. [Read more...](#)

Information for:

Students

Prospective Students

Faculty & Staff

Alumni

Parents & Families

NORTHWESTERN UNIVERSITY LIBRARY

Main Library Hours: 8
[more for Sat](#)

search library resources...

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POPULAR LINKS

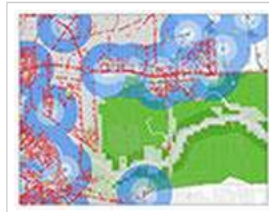
- [NUcat - Library Catalog](#)
- [e-Journals](#)
- [All Databases](#)
- [Recommended Resources by Subject](#)
- [Reserve a Study Room](#)
- [Computer Lab Availability](#)

EVENTS

- [Changing tables to maps](#)
04/20/2015 - 12:00pm - 2:00pm
- [Mendeley Workshop](#)
04/21/2015 - 2:00pm - 3:00pm
- [EndNote: Basics, Tips and Tricks](#)
04/22/2015 - 12:00pm - 1:00pm
- [Easy Demographics Using GIS](#)



NEWS



ArcGIS mapping software available across all campuses

New institution-wide license makes ArcGIS available for entire Northwestern community



Moving from NUsearch to NUCat

Library transitions to new resource discovery system

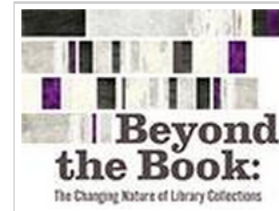
[more news](#)

LIBRARY HIGHLIGHTS



Farm to table

New exhibit highlights governmental role in American food industry



Just the artifacts

Exhibit proves libraries are more than books

Development strategies

Northridge

- Set funding priorities for unprocessed archives
- Create philanthropic culture in the Library
- Create Library Advisory Board with giving expectations
- Target emeritus library staff
- Target alumni with library connection
- Pursue naming opportunities
- Create marketing materials that highlight opportunities for giving

Northwestern

- Set priorities and smart goals
- Capitalize on benefits of centralized development
- Develop relationships with Board members
- Understand challenges of strong school identity
- Raise awareness of library
- Cultivate current and future alumni donor base
- Entice and engage

Development Staff

Northridge

- Director of Development (half time for the Library; reports to Advancement; dotted line to Library Dean)
- Library Dean
- Library Projects & Programs Coordinator, and staff
- Central Development staff

Northwestern

- Director of Development (reports to Office of Alumni Relations & Development; dotted line to Dean of Libraries)
- Library Dean
- Library Director of Public Relations and staff
- Central Development staff

Fundraising

- **Friends of the Library**
- **The WISE Board**
- **Annual giving and endowments**
- **Restricted vs unrestricted gifts**
- **Prospect research**
- **Cultivation of donors (and potential donors)**
- **Relationship with Central Development**

Role of Library Philanthropic Boards

- **Volunteering (giving of time)?**

OR

- **Philanthropy (giving of treasure)?**

Friends of the Library

- **15 years ago FOL bookstore and memberships brought in revenue -- but this has sharply decreased, and in fact the bookstore has closed**
- **New and continuing roles for Friends board members – volunteering as docents, award committees, newsletter -- but where is the philanthropy? One or two board members are givers, but most are not.**
- **Evolve Friends board into a philanthropy-based Advisory Board?**

WISE Board

- **WISE (Women in Science and Engineering)**
 - **Based on a large endowment**
 - **An anomaly, due to politics**
 - **Plans events and programs**
 - **Enormous use of the dean's time**
 - **Less than 10% of the revenues from the endowment go to library collections**
 - **Must develop strategy for building up the endowment (goal: hire a WISE staffer)**

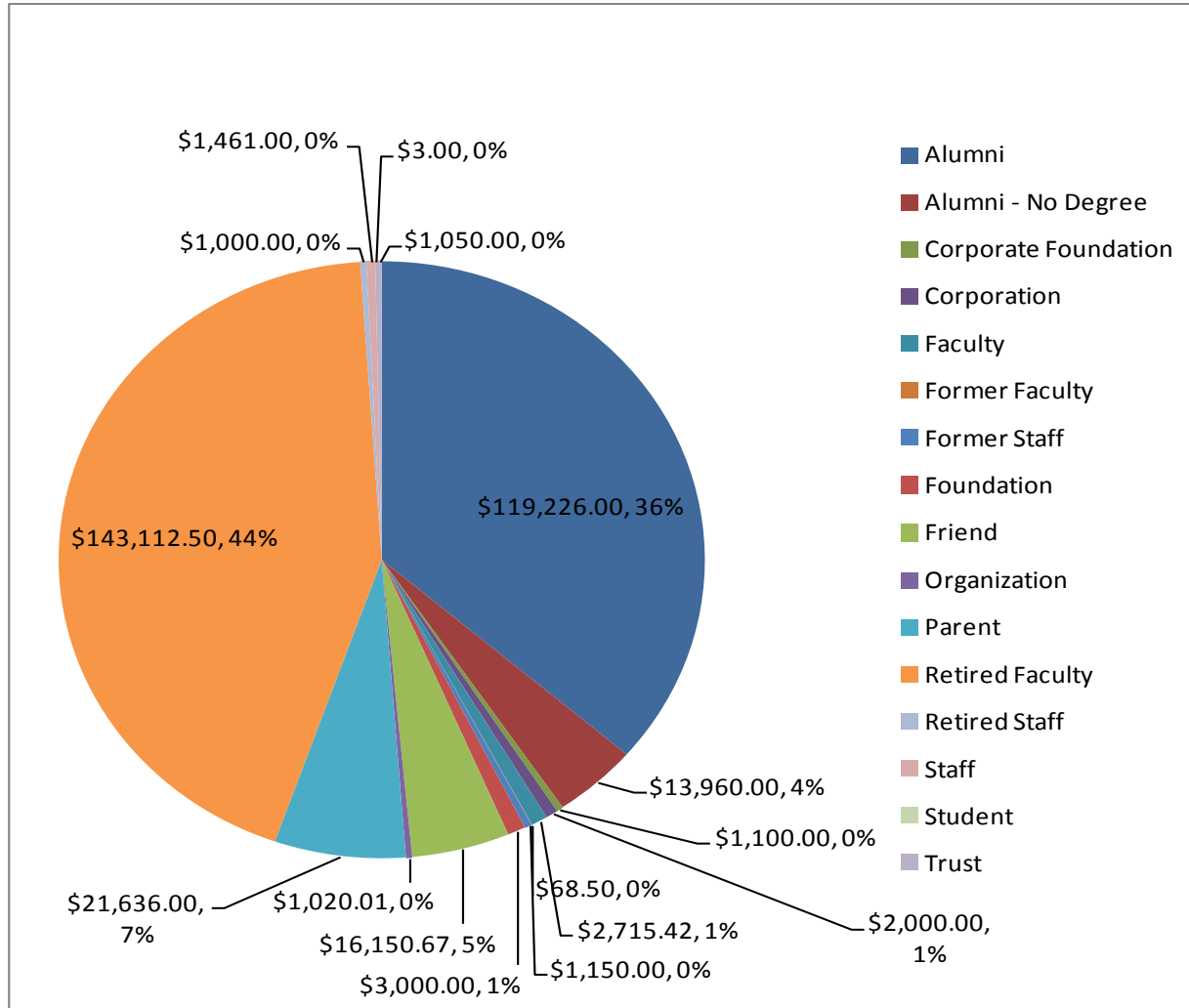
Annual Giving and Endowments

- **Donors by source**
- **Fundraising snapshot**
- **Endowments by the numbers**

2013 Donors by Source

Alumni	\$119,226.00	36%
Alumni - No Degree	\$13,960.00	4%
Corporate Foundation	\$1,100.00	0%
Corporation	\$2,000.00	1%
Faculty	\$2,715.42	1%
Former Faculty	\$68.50	0%
Former Staff	\$1,150.00	0%
Foundation	\$3,000.00	1%
Friend	\$16,150.67	5%
Organization	\$1,020.01	0%
Parent	\$21,636.00	7%
Retired Faculty	\$143,112.50	44%
Retired Staff	\$1,000.00	0%
Staff	\$1,461.00	0%
Student	\$3.00	0%
Trust	\$1,050.00	0%
Grand Total	\$328,653.10	100%

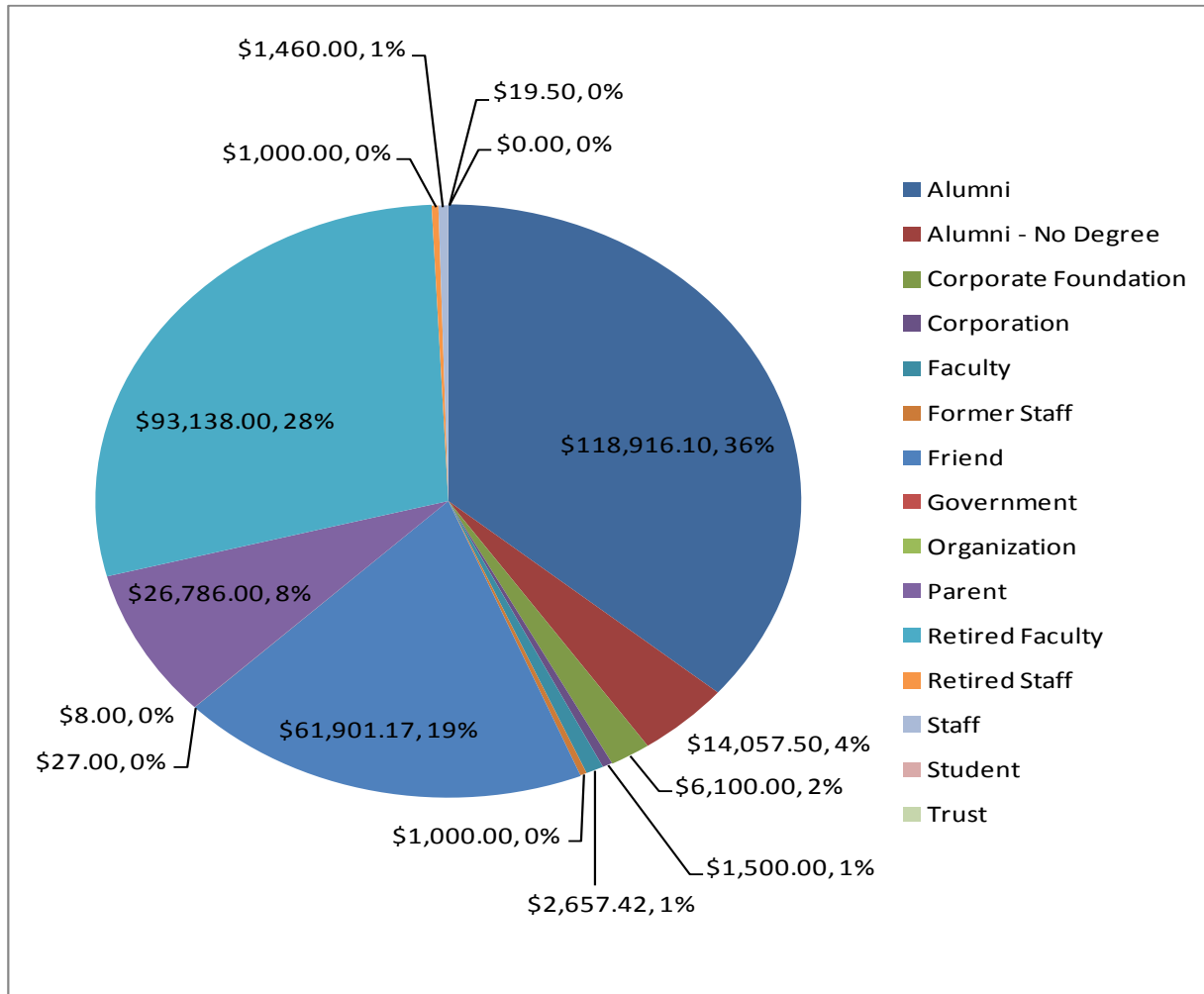
2013 Donors by Source



2014 Donors by Source

Alumni	\$118,916.10	36.19%
Alumni - No Degree	\$14,057.50	4.28%
Library 2014 Donors by Source		
Corporate Foundation	\$6,100.00	1.86%
Corporation	\$1,500.00	0.46%
Faculty	\$2,657.42	0.81%
Former Staff	\$1,000.00	0.30%
Friend	\$61,901.17	18.84%
Government	\$27.00	0.01%
Organization	\$8.00	0.00%
Parent	\$26,786.00	8.15%
Retired Faculty	\$93,138.00	28.35%
Retired Staff	\$1,000.00	0.30%
Staff	\$1,460.00	0.44%
Student	\$19.50	0.01%
Trust	\$0.00	0.00%
Total	\$328,570.69	100.00%

2014 Donors by Source



Fundraising Snapshot

- **Oviatt Library Endowment (as of June 2014):**
 - **\$2.37 million**

- **Annual giving to the Library:**
 - **2013: \$328,653**
 - **2014: \$328,570**

- **Institutional Endowment (as of June 2014):**
 - **\$87.5 million**

Library endowments by the numbers

- Oviatt Library has 19 endowments , totaling about \$2 million.
- Current revenue for those funds (4% annually) is \$80,000.
- To put that in perspective, the library's allocated budget this year is about \$9,365,000.
- Endowments pay for collections, archives, special programs such as lectures and exhibits, and internships.
- Our collections budget is about \$2 million, but endowments for collections generate only about \$20,000 per year.

Restricted vs Unrestricted Gifts

- **Restricted gifts are often difficult to spend, whether a regular donation or revenue from an endowment**
 - **Collections (often defined very narrowly)**
 - **Programs and events**
 - **Internships**
- **Unrestricted gifts are a dean's dream come true**

Prospect Research

- **Raiser's Edge (alumni and donor database)**
- **Library prospect research is a double edged sword**
 - **Library has no alumni**
 - **All alums are library alums? Really??**
 - **Must rely on the alums who are either:**
 - **disenchanted with their colleges or**
 - **have a very warm spot in their hearts for the Library**

Cultivation of Donors

- **Phone calls**
- **Letters, cards, and personal emails**
- **Lunches and dinners (food!)**
- **Special events (more food!!)**

Relationship with Central Development

- **They offer support:**
 - **through collegial relations with other directors of development and deans**
 - **through some assistance with organizing some events**
 - **but the responsibility for raising money is on the Library**

SERVICES

RESEARCH ASSISTANCE

COLLECTIONS

ABOUT

AS



s and Giving

Ways to Give

Give Online

[Donate Now](#)

Making a gift online is easy and a great way to support the Library. Click on the [link to California State University's secure online donation page](#) to choose to make a one time gift to the Library, or to set up a recurring gift.

Your Gift Makes a Difference

The Library's mission is to support the academic programs of the University. In order to accomplish this mission, we must have a dynamic collection that will serve the needs of the faculty and the students. As new courses are developed, the Library must be able to respond by purchasing new materials in support of the

How a Gift Makes a Difference

The Library's mission is to support the academic programs of the University. In order to accomplish this mission, we maintain a dynamic collection that will serve the needs of the faculty and the students. As new courses are added, or our focus shifts, the Library must be able to respond by purchasing new materials in support of these changes.

A gift will allow us to continue to meet the needs of our students and faculty by giving us additional flexibility in purchasing the most needed of books, electronic resources, journals, and other Library materials.

How to Give

To make a gift to the Oviatt Library or for further information on any of these gift possibilities, contact:

Luann Rocha
Director of Development, Oviatt Library
677-2635

Email: luann.rocha@csun.edu

Support a Collection

Become a Friend of the Library

Sponsor an Exhibit

Endowment Opportunities

Naming Opportunities

Consider Planned Giving

Secure Online Giving Page

Donate to CSUN's Oviatt Library

Depending on the device/software used to complete this form, required fields may not be announced as required, please fill out all applicable fields. For assistance completing this form, please contact our [web producer](#).

* Required Field

Personal Information

* First name:

* Last name:

* Relationship to School:

Address Information

* Address 1:

Address 2:

* City:

* State:

* Zip Code:

* Country:

Contact Us

We welcome your feedback and questions!

(818) 677-2635

development@csun.edu

Contact Information

* Day Phone:

* Email Address:

Donation Information

One Time Gift

Recurring Gift

* Amount:

* Designation:

Add Designation

Total: \$0.00

What prompted you to make this gift?

- Received solicitation letter in the mail
- Received pledge reminder letter
- Student phone call
- Contact with development officer
- Received e-mail solicitation
- Other

For honorary or memorial gifts, please include in Special Instructions the name of the person being honored/memorIALIZED and the name and address of the person to whom you would like the acknowledgement sent.

Special Instructions:

Oviatt Library Webpage Donor Designations

- **Oviatt Library Excellence Fund**
- **Oviatt Library Scholarship Fund**
- **Friends of the Library**
- **Library Special Collections & Archives**
- **CSUN Librarians Legacy Endowment**
- **Library Innovation & Upgrades**
- **Library General Collections Endowment**
- **Library International Guitar Research Archives**
- **Old China Hands Archive**
- **Other (describe in Special Instructions Section)**

THANK YOU



give.csun.edu/oviatt

CSUN SHINE | California State University
Northridge

Greetings from the
Delmar T. Oviatt Library



As the proud heart of a richly diverse campus community, the Oviatt Library has much to be thankful for. With the first phase of our renovation project complete, we are grateful to be able to share the Learning Commons. The highly motivated student body and extremely dedicated faculty and staff here at CSUN deserve nothing less than this beautifully redesigned and technologically advanced environment. As the Library continues its transformation to meet the growing needs of future scholars, we are thankful for some newly formed partnerships with the Learning Resource Center, Information Technology and the University Corporation.

Additionally, we are forever grateful to our longtime Friends of the Library and generous donors without whose ongoing support we would not be able to fund student scholarships; special speakers; unique exhibits; and the acquisition, processing, and digitization of singular and irreplaceable archival collections.

From all of us to all of you, simply and profoundly, thank you.

Mark Stover, Ph.D.
Dean, Delmar T. Oviatt Library



Fundraising

- **Board of Governors and Deering Society**
- **Annual giving and endowments**
- **Restricted vs unrestricted gifts**
- **Relationship with Central Development**
- **Campus partnerships**
- **Donor cultivation**

WE WILL.

THE CAMPAIGN FOR NORTHWESTERN

MAKE A GIFT

Your annual gift counts towards the Campaign

WAYS TO GIVE ▾

WHAT TO SUPPORT ▾

WHY GIVE? ▾

ABOUT THE CAMPAIGN ▾

University Library Deering Society

The premier philanthropic group of University Library takes its name from the family whose generosity established the Charles Deering Library. Today, committed donors join new generations of the Deering and McCormick families in the same spirit of giving, sustaining the Library as the intellectual crossroads of Northwestern.

Membership in the Deering Society is extended to those who make contributions of \$1,000 or more annually. A gift at this level also qualifies you for membership in the [Northwestern University Leadership Circle](#), a University-wide giving society.

WHY GIVE?

Impact Stories

Proudly Purple

Gift Announcements

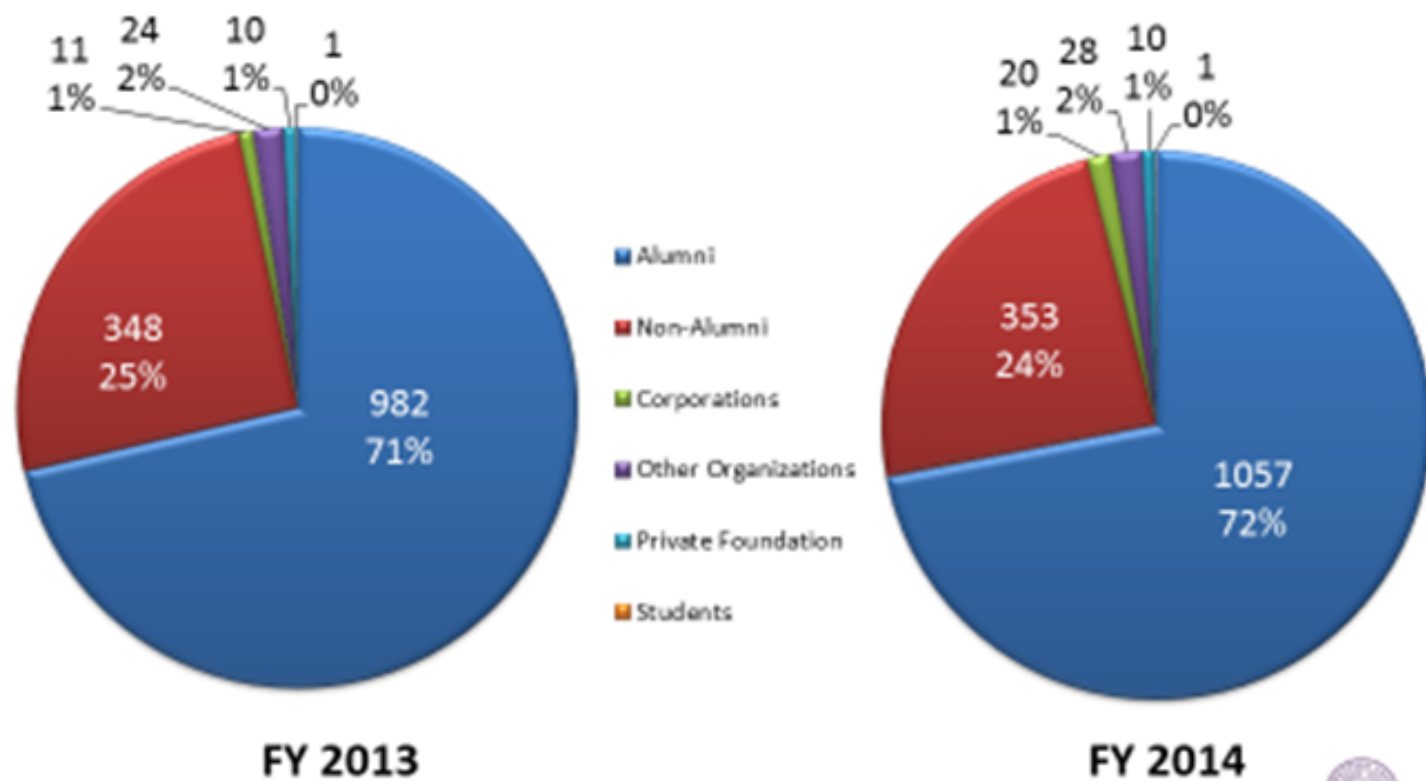
Recognition

- Northwestern University Leadership Circle
- 1851 Society
- College & School Giving Societies
- Henry and Emma Rogers Society
- The Wildcat Fund (Athletics)
- University Library Deering Society
- Block Leadership Circle
- Honor or Remember a Loved One
- Honor Rolls
- NU Loyal

Annual Giving and Endowments

- **Donors by source**
- **Fundraising snapshot**
- **Endowments by the numbers**

Donors by Source



Fundraising snapshot

University endowment

Institution	2014 (billion USD)	2013 (billion USD)	2012 (billion USD)	2011 (billion USD)
Northwestern University	\$9.778	\$7.883	\$7.119	\$7.183

Annual giving to the library

Fiscal Year	Cash	New Gifts and Commitments	Distinct Donors
2012	\$1,392,098.53	\$1,102,200.21	1,338
2013	\$4,330,915.92	\$3,333,696.59	1,376
2014	\$2,062,119.04	\$2,645,605.34	1,471
2015	\$2,077,097.60	\$8,874,581.60	1,050

Library endowments by the numbers

- **The library currently manages 139 endowment spending accounts. Current budgeted revenue for those funds is \$3,966,688. To put that in perspective, the library's allocated budget is about \$23,700,000.**
- **NUL has 5 librarians and staff members paid from endowments we control. In addition, the dean, the curator of the Africana library, and the head of the preservation department are sometimes called "endowed" positions (named positions that paid indirectly from endowments the university controls).**
- **The majority of the endowments are specifically set up to support collections--some in specific disciplinary areas and others more general. That is also the purpose to which the most money goes (\$2.9 million this year). Total collections budget is about \$12,300,000--so endowment accounts for almost a quarter of collections spending.**

Restricted vs Unrestricted Gifts

- **Restricted gifts can present challenges, whether a regular donation or revenue from an endowment**
 - **Collections (often narrowly defined)**
 - **Programs and events**
 - **Areas of expertise**
- **Unrestricted gifts an endangered species**
- **How much is open to interpretation?**

Donor cultivation

- **The “library alumni” quandary**
- **Phone calls**
- **Letters, personal email, holiday gifts**
- **Lunches and dinners**
- **Visits**
- **Special events**
- **University perks (such as honorary degrees)**



NORTHWESTERN UNIVERSITY

Give every year. Make a difference every day.

Please accept my gift of \$ _____

\$ _____ Areas of Greatest Need \$ _____ University Library

\$ _____ University Scholarships \$ _____ Athletics and Recreation

\$ _____ School: _____ \$ _____ Block Museum

\$ _____ School: _____

\$ _____ Other: _____

Name _____ School/Grad Year _____

Address _____

City/State/Zip _____

Cell Phone _____ Preferred

Home Phone _____ Preferred

Preferred E-mail _____

Alternate E-mail _____

Enclosed is my check to Northwestern University.

Charge my credit card. VISA MC AmEx Discover

Account Number _____ Exp. Date _____

Signature _____

Company Name _____

Business Address _____

City/State/Zip _____

Business Phone _____

Business E-mail _____

CAP1A

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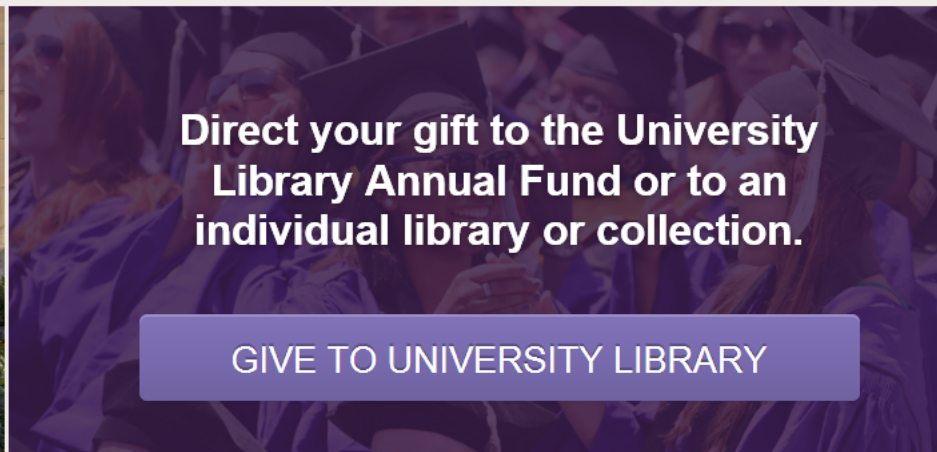
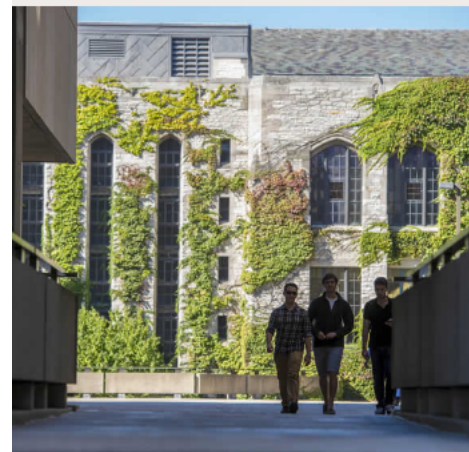
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QUESTIONS?

University Library Development
Carlos Terrazas '98
Director of Development
847-467-2631

Takeaways

- **Library marketing and development is a balance -- sometimes a tension -- between building special relationships with donors and potential donors and fulfilling the core mission of the Library.**
- **Librarians and non development staff sometimes feel that development and other types of "advancement" (such as marketing) detracts from our core values and mission.**
- **But the reality (big picture thinking) is that fundraising and marketing allow the Library to do things that we wouldn't normally be able to do (e.g., expansion of special collections & archives, hospitality, etc.).**

Discussion & questions

Thank you

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