



Albany County Public Library
Foundation

Caitlin White FY24 Self-Evaluation

April 2024

The executive director's self-evaluation included here is based on a list of priorities outlined by the Personnel Committee and myself for fiscal year 2024. The priorities are outlined by section, under which I have listed specific goals and the self-evaluation of each goal. Goals for FY25 are included at the end of this document.

Administrative

1. Reorient organization to work more efficiently and manage the ACPL Foundation office, a remote office, and set of volunteers.

This goal was completed successfully. Jacque and I worked to distribute tasks and implement practices that allow the Foundation office to run effectively between Laramie and California. We purchased a two-drawer printer to allow Jacque to print different documents without needing me to change paper in the printer. We also put together a schedule and budget to allow Jacque to visit a few times per year for work purposes. I have been doing well with in-house volunteer tasks. I have predominantly been working with one volunteer and one or two assigned library volunteers.

Board of Directors

2. Increase opportunities for board members to become more active with the organization by June 2024.
 - a. **This goal is ongoing.** In FY24, the Nominating Committee created a board development sign-up sheet for board members to list what they were interested in helping with during the year. Filling out the form was optional, and we had four board members complete it. For certain opportunities for help, I did contact specific board members to assist. For example, I coordinated with Aimee to attend a Business After Hours and worked with Terri and Raj to update the Declaration of Trust. Aimee also helped prep Blind Date with a Book items from home, which was super helpful. Terri was very helpful with mineral rights research. In other areas, I was not as diligent about receiving the help board members noted they could provide. I do have Barbara signed up to bring snacks to the May board meeting. I think providing the opportunities in writing for board members is a good idea, and with practice, Jacque and I can develop a better system to encourage more activity and keep members informed.
3. Develop board development schedule and provide development at all board meetings in FY24.

This goal will be completed by the end of the fiscal year. At the July annual meeting, the board reviewed expectations, set committee assignments, reviewed personal contributions and volunteer opportunities and provided final approval on the budget. At the September meeting, the board reviewed the

annual report and reviewed wealth management practices with First Interstate Bank. At the November meeting, the board took a tour of the planned infrastructure grant project. In January, the board learned about the ACPL Foundation planned giving program and reviewed restricted funds. In March, the board reviewed progress on the 2020 strategic plan and goals, updated the Declaration of Trust, and reviewed the edited Foundation history. For the May meeting, Rachel will be asked to inform the board about the ACPL strategic plan, and the board will take a tour and review the Agnes Milstead mineral rights. A few tasks outside of meetings we did not yet get to include: a Foundation board meetup and social time and a collaboration between the three boards. These will be revisited in FY25.

Financials

4. Revisit sale or lease of Agnes Milstead mineral rights by June 2024.

This goal will continue into FY25. I started working on the mineral rights situation again in March 2024. I tried to work with the Laramie County assessor office to determine the landowner above the Foundation mineral rights. They weren't able to help me over the phone. I did send out inquiries to a few suggested mineral rights firms. One firm was disinterested in listing our mineral rights because they have not been earning royalties and are not leased, making them more difficult to attract a buyer. Terri offered to help research the mineral rights. She was able to find the landowners above the mineral rights. I will keep working on ideas to wrap this situation up in FY25.

Planned Giving

5. Determine purpose, solicit family input, and implement Anne Mears' bequest (contingent on receiving funds in FY24).

This goal will move forward to FY25. The ACPL Foundation received a subsequent round of paperwork from the law firm working on Anne Mears' estate in FY24. This paperwork noted that there were still several trust and accounts to go through before any type of distribution would be available. I recently heard from the attorney handling the estate. There are a few issues with a portion of the funds that should be available as part of Anne's estate. Depending on how this situation progresses legally, we can expect either \$235,000 or \$156,943.

6. Oversee Hattie Geesey memorial project, in collaboration with the Friends of the Library by June 2024.

This goal is on track and will be completed in FY24. To honor Hattie's legacy, the Friends of the Library Book Nook will receive handcrafted, new shelving. This was the project that appealed most to Hattie's husband, Jim. I worked with Meg Thompson, a local carpenter, to plan the space in March 2024. Meg completed the other new shelving at ACPL. Meg is currently working on the project and the new shelving should be up in the library before the end of the fiscal year.

7. Finalize planned giving marketing and prepared written agreements by March 2024.

This goal was completed successfully in April 2024. For this goal, I needed a slight extension on the deadline. The board did approve the planned giving marketing materials during a FY24 meeting. It also reviewed ideas for written agreements. I developed three agreement forms in April. These are for planned gifts, setting up a restricted fund, and major gifts. The forms will be available in print and online. The Foundation website was updated with suggestions for gift language, types of gifts we accept, and other information. You can view the changes at foundation.acplwy.org/ways-to-give/planned-gifts.

8. Set up a minimum of 5 planned gifts in FY24.

This goal was not successful. I was unable to give planned giving the time it needs during FY24, due to work on other projects. While I did begin work or finish projects for planned/major gifts that were established in previous fiscal years, I did not succeed in setting up 5 new planned gift agreements, as of April. One agreement was set up with a donor interested in providing a donation related to Sally Dieterich. I am disappointed that I was unable to put more effort into this area, since I think it is of great importance to the ACPL Foundation. I hope to better plan for this area in my goal for FY25.

Marketing

9. Brainstorm and implement new plan for Newsletter #1 by October 2023.

This goal was completed successfully. The October newsletter transitioned to an email-only version. I drafted and designed an email newsletter template to encourage readership. The e-newsletter included announcements, a few photos, program highlights, a link to a donor survey, and info on the upcoming Friends of the Library sale.

Statistics from our donor database, NeonOne, noted that the average open rate of any nonprofit email is 28% with an average click rate of 3.29%. According to NeonOne, about 9% of an email list usually unsubscribes.

The ACPL Foundation October newsletter email had a 41% open rate and a 2% click rate. We had 430 people open the email a single time and 764 total opens. For our click rates, the majority of clicks were to either take our donor survey, visit the ACPL website, or visit our website. Our unsubscribe percentage was very low at 1%.

Outside of email statistics, I heard several positive comments about the look and information provided in the e-newsletter. For FY25, I have ideas to increase donations by email when the newsletter is sent out. Another positive of the newsletter design is using it for the print/email versions as well. While it takes more time to prepare to send out, already we are seeing increased numbers and engagement on our March newsletter email.

10. Increase marketing efforts for fundraisers/outreach, with a focus on relationship building.

This goal was successful. Over the course of FY24, I worked to be more creative and diligent about marketing efforts for fundraisers and outreach. We received many positive comments about the time and effort we put into our WyoGives materials and video. Other increased marketing efforts during FY24 include:

- Offering more opportunities for engagement through social media posts (ie. Offering prizes for guessing correctly)
- Increasing variety on posts (text only, video, photos, slides)
- More consistent posting across efforts

These efforts have increased our engagement and interest online, as well as providing more interest for recognition posts for monthly sponsors, other sponsors, and grant funders.

Jacque and I have also been working to increase email recognition and communication through our donor database. This takes a significant amount of work, so the progress is slow. I am working to set up recognition emails for different types of donations. We trialed this with Cupcake Ball and Blind Date with a Book. In FY25, we will attempt to put these together for each type. We are envisioning having a quarterly impact email go out to those donors that provided funding during the past quarter. These types of efforts have been shown to increase donor retention.

Special Projects

11. Manage bookmobile major gift project with donor and library staff.

This goal is progressing well and will continue into FY25. The major gift is \$30,000 for a specific list of items the donor was interested in providing for the bookmobile. In FY24, we were able to purchase banners for parades, open signs and banners, and banner weights. These were used and tested over the summer/fall season in 2023. The old-fashioned RV blinds were removed, carpets were cleaned, and new rugs were purchased. In early 2024, Alby, the bookmobile headed to Cheyenne for more of the major improvements. The bookmobile received new driver and passenger seats, new seat belts, and had the motorized steps removed. The bent front passenger corner and broken side mirror were repaired and a universal “off” switch was installed. The shop also worked on pricing a new back up camera and installing exterior gromets. Finally, the generator received annual maintenance. Once it returned to Laramie, work will begin on weather stripping the underside and basic maintenance before it hits the road for the summer season. These expenses totaled about \$11,000 in FY24. I communicate with the donor at least on a monthly basis with updates. The donor has been pleased with the progress.

Continuing Education

12. Attend a School of Philanthropy course to continue classwork toward Fund Raising Management Certificate.

This goal was completed successfully. I attended Managing the Capital Campaign at the Indiana University School of Philanthropy. This was the final course for my Fund Raising Management Certificate. I also received a scholarship grant from the Wyoming Community Foundation to cover the cost of this class.

13. Attend at least one continuing education related task per month related to ACPL Foundation job duties by June 2024.

This goal was successfully accomplished. Each month I have a few continual continuing education tasks. These include weekly attendance at Rotary, monthly board chair lunches, monthly Wyoming Library Association board meetings, and monthly WLA Legislative Committee meetings. The meetings below are additional:

- July – WyoGives planning and participation with nonprofits
- July – EveryLibrary marketing and promotions meeting
- July – Wyoming Humanities Council grant meeting
- July – Meeting with Police Chief Brian Browne
- August – Fundraiser discussion
- August – ANB Business After Hours
- August – Fundraiser venue tour
- August – Planned giving conference
- August – Friends of the Library meeting
- August – Infrastructure grant webinar
- August – Meeting with engineer
- September – First Interstate Bank events
- September – FIB Business After Hours
- September – Meeting with engineer/architect and contractors
- September – Presentation to UW class
- October – Walmart grants webinar
- October – School libraries meeting
- October – Meeting with WLA lobbyist
- October – Wyoming Library Association Conference attendance and presentation
- November – UW Law School Library tour
- December – Lunch with donor
- January – Tax webinar
- February – Legislator phone calls/emails
- February – WLA Legislative Reception
- February – Legislative Session
- February – Nonprofit webinar
- February – March – Capital Campaigns course
- March – Legislative Session
- March – Rock River grant presentation
- March – WyoGives webinar
- March – Smile Doctors collaboration

- April – EveryLibrary voter guide meeting
- April - Fundraising donation form best practices webinar
- April - WyoGives collaborations
- April - Infrastructure grant collaborations
- June – Presenting at Preserve Wyoming conference

Fundraising

14. Maintain public support income and fundraising event income for FY24.

Table 1: Fundraising Goals and Outcomes

| Fundraiser: | Fundraising Goal: | Fundraising Actual: |
|--|---|--|
| WyoGives 2023 | \$4,000 (not including match) | \$16,285 (before match) \$12,107.20 (match) \$28,392.20 total |
| Grant Funding | Total: \$69,180 \$25,000 (Guthrie Family Fd) \$5,000 (Union Pacific Fd) \$5,000 (Rocky Mt Power Fd) \$3,500 (FIB Fd) \$500 (FIB Fd) \$10,000 (WY Comm Fd 1) \$10,000 (WY Comm Fd 2) \$5,000 (Walmart) \$2,000 (WY Humanities) \$2,500 (LRCD) \$680 (WY School Alliance) | Total: \$56,080 \$20,000 \$5,000 \$1,500 \$3,500 \$500 \$10,000 \$10,000 \$400 \$2,000 \$2,500 \$680 |
| Annual Report | \$3,000 | \$3,417.23 |
| O'Dwyers Bingo Nights | \$150 | \$125 |
| Giving Tree/ Holiday Appeal | \$20,000 | \$19,240.23 |
| Monthly Donors | N/A | \$2,610.44 |
| Blind Date with a Book | \$3,000 | \$6,281.86 |
| Cupcake Ball | \$600 | \$549.09 |
| March Newsletter | \$3,000 | \$3,268.33 (as of April 24) |
| June Newsletter | \$2,000 | *Still in progress |
| Toyota of Laramie Cares | \$1,500 | \$0 |
| General Sponsors | \$15,000 | \$12,425.75 (as of April 10) |
| Limited Edition Library Cards, Tote Bags, T-shirts | \$500 | \$219.11 (As of April 10) |
| Birthday Parties | \$250 | \$250 |
| Lapsed Donor Appeal | Re-engage 15% of donors solicited | *Still in progress |
| Business Appeal | \$3,500 | *Still in progress |

Table 2: Outreach Goals and Outcomes

| Outreach Event: | #s/Goal: | #s/Goal Actual: | Notes: |
|------------------------|---------------------------------|------------------------------|--|
| Summer Reading Bash | \$750 250+ participants | \$750 264 participants | *This partnership with Smile Doctors is going well. In FY25, ACPL and Smile Doctors are partnering to put on the Summer Reading program. |
| Jubilee Days Parade | Encourage SRP Bash participants | Did not attend parade | *ACPL opted to skip this because of low staffing. Attendance at the Bash was great, so parade doesn't seem to be needed for advertising. |
| October Newsletter | Replace with email version | -41% open rate -430 opens | *Heard many positive comments after the first email newsletter went out. |
| Appreciation Night | \$1,000 | \$1,000 | *This is a donation provided by the Friends of the Library. |

Albany County Public Library Foundation
Caitlin White Goals for FY25
May 2024

The goals listed below are grouped by category. For FY25, I have included a measurable goal and as needed, the reasoning behind the goal. The focus for this year's goals is split between organizational management and marketing.

Administrative

1. Convert ACPL Foundation QuickBook desktop company to QuickBooks online company. Train and update to smoothly transition from desktop to online.
2. Provide more consistent training/information about the ACPL Foundation to library staff and the Friends of the Library.

Board of Directors

3. Develop board development schedule and provide development at all board meetings in FY25, including training on financial statements.
4. Provide opportunities for the three library boards to get together, as well as an opportunity for the boards to meet and mingle with staff.

Financials

5. Revisit sale or lease of Agnes Milstead mineral rights by June 2025.

Planned Giving

6. Determine purpose, solicit family input, and implement Anne Mears' bequest (contingent on receiving funds in FY25).
7. Develop planned giving prospect list and prepare mailing by June 2025.

Special Projects

8. Manage bookmobile major gift project with donor and library staff.
9. Project manage \$1 million infrastructure grant.

Marketing

10. Brainstorm and develop plans to increase individual giving during FY25.
11. Alter the Giving Tree fundraiser to provide more opportunities for donors to give toward special projects and purposes.

Continuing Education

12. Attend at least one continuing education related task per month related to ACPL Foundation job duties by June 2023.

Fundraising

13. Maintain public support income and fundraising event income for FY25. Monetary goals related to each fundraising area and plans for outreach activities are included in the Fundraising/Outreach Plans for FY25. This has been approved by the Fundraising Committee. It is subject to change throughout the fiscal year. Board members can review this document [here](#)