

## **JOINT BOARD RETREAT**

**November 29, 2018**

During the Joint Retreat of the Library and the Foundation Boards held at the Library on November 29, 2018, the following ideas for a possible capital campaign tied to the Library's upcoming 200<sup>th</sup> anniversary (2023) were shared with the Board. Board members and staff attending the retreat broke into smaller discussion groups to consider these options, suggest others that might have been missed, and provide feedback on the priorities the Library staff have identified as important for our future. The notes from the four discussion groups follow the "Creating a Case" document.

### **Creating a Case for Public/Private Funding Support**

In 2014, the Library of Virginia Foundation engaged the Curtis Group, a fundraising strategy firm that works with nonprofit organizations, to conduct a study of the Library and the Foundation's capacity for fundraising and readiness to launch a capital campaign. The study involved interviews with existing and potential donors, foundations, members of the legislature, and key stakeholders, followed by an online survey sent to longtime Library users and supporters. The study report revealed strong interest in and good will toward the Library and its mission, but also showed that among prospective donors and elected officials there was limited understanding of the Library's needs and some concern that the Library and Foundation did not yet have a track record in major gift fundraising. The report concluded that while a capital campaign with a goal of \$20 million was not realistic, the potential to raise \$4 to \$5 million did exist if a campaign was tied to a carefully crafted case for support.

The Curtis Group report recommended that in building its case, the Library should set clear and realistic fund raising priorities that will engage the entire commonwealth through programs, events, and other initiatives. Priority projects should speak directly to the Library's relevance today and in the future as well as incorporate education and technology components. Taken together, the Library's priorities for funding should emphasize the importance of public-private partnership.

Based on the Curtis Group's findings, Library staff and management have refined our list of funding needs to bring it closer to the \$4 to \$5 million target – but our list still needs some work. Today, we hope you will share your thoughts and feedback about our priorities and the feasibility of securing public and private funds to support them. We are eager to learn what resonates with you, excites you, and also what in your view might be missing from our list. Our goal is to arrive in the near future at consensus on our priorities so that we can build a compelling case for launching a successful fund-raising effort that we can celebrate on the occasion of the Library's 200<sup>th</sup> birthday.

Our priorities fall within two major categories – reimagining and repurposing the public spaces in the Library building and significantly expanding and improving access to our collections.

### **Reimagined/Repurposed Library Space:**

Designed in the mid-1990s – before users had mobile devices and when research was conducted almost exclusively in person rather than online – the Library’s current building served our users extremely well for many years. During the past two decades, however, technology has transformed how users access our staff and collections and has altered what they would like to find in our building when they visit. We need to rethink and repurpose our public spaces to better meet researchers’ needs and provide a richer, more meaningful experience to the public who live and work in downtown Richmond. We propose devoting half the funds raised through a campaign toward improving and reenergizing the space on our first and second floors.

#### **Proposed goal -- \$ 2,500,000**

Redesign the security, entrance, and reception area

Move the café to the front of the lobby area, possibly combining it with the shop.

Make the lobby/atrium area more inviting, with comfortable seating and welcoming ambiance

Expand the exhibition gallery/improve space for physical and electronic exhibitions

Redesign space on east side of the second-floor reading room (to include more dynamic use of the main room for programming, construction of 2 to 3 meeting rooms along the outer glass wall to create more meeting space for small groups, and similar improvements)

Enclose and possibly expand Archives Research Room, to enhance security and provide appropriate space for using maps, oversized materials, and possibly items from Special Collections

Convert former Government Documents Room into additional exhibition space, either for display of seminal documents in Virginia history or for displays of collections that tie the past to issues/concerns facing Virginia today

### **Transforming Access and Reach:**

We propose devoting half the funds raised through a campaign to projects and activities that continue to build the Library’s physical and digital collections and make it possible to conduct

programs and outreach initiatives in communities across the state. Funds raised might be project or activity based or endowments that allow for sustainable work over time.

**Proposed goal -- \$2,500,000**

Statewide Programming and Outreach

Digitization

Virginia Untold Project

Minority Fellowship/Internship in Archives and Public History

Special Collections Acquisitions

**BREAKOUT SESSION NOTES**

**Group I – Gregg Kimball**

**Attending:** *Foundation Board:* Julia Marsden; *Library Board:* Barbara Vines Little, Paul Brockwell, Robert Aguirre; *LVA staff:* Gregg Kimball, Meghan Townes

**1. Make the 1<sup>st</sup> floor a welcoming community space with a superior user experience**

The group agreed that the entry point to the Library and the lobby are intimidating. The first encounter is with security and the lobby is not inviting. The atmosphere is anything but friendly. As one board member commented, we need a first-class “hotel welcome.” There is no orientation on the first floor from either staff or signage and/or a display. The space does not tell a visitor who we are. If we want this to be a truly community space, we need to make sure that all of the people of the community see themselves reflected in presentations in this space – it is their house. This could be done through exhibitions, digital displays, etc. The group also emphasized exploration in the space. As one person put it, provide “excuses to be distracted.” Specific examples of possible new uses included a Jazz night in the previously forbidding Detroit Institute of Art atrium that drew a new crowd. VMFA is a good parallel here. There was also discussion of more flexible hours.

**2. Improve visitor experience to website and digital assets**

This conversation mirrored discussions that Library staff have had internally regarding resources being hard to find on the website and the inability to search across collections, etc.

The new ILS/CMS should alleviate these problems to some degree, but we still need a better “front end” experience. Another specific recommendation was to add short videos about specific record types.

### **3. Communication and Marketing**

Our group felt that improving our messaging and marketing is fundamental to everything we do. If people do not know about us and our projects, they might as well not exist. The group felt that the 2023 statement in the strategic plan document would be a good starting point for improving our messaging: “In 2023, The Library of Virginia will be an open, inclusive, and empowering force in every Virginian’s life.” There were some specific examples of opportunities to raise awareness, such as the 2020 Virginia Humanities annual conference at JMU, the 2021 meeting of the National Genealogical Society in Richmond, and perhaps Rootstech in 2023. Of course, we would also survey other organizations doing the best work in all areas of marketing and communication such as the California State Library.

### **4. Bringing the Library to the rest of Virginia, America, and the World.**

The group felt that we cannot be Virginia-centric – we are an institution with a statewide and national audience with collections that speak broadly to the American experience. *Virginia Untold* is a project that could have a national audience. There are national funders supporting “Patriotic Philanthropy” who could help us raise funds to drive civics education and discourse around our key documents. In terms of our statewide outreach, the group suggested projects and programs focusing on regional themes attractive to audiences in different parts of the state, such as the Blue Ridge Parkway and Appalachian Trail and NASCAR. New themes that are increasingly relevant, such as the environment, are also worth exploring. We should find the unique partners in all regions of the state – they will not always be the same kinds of organizations in different parts of the state.

### **5. Minority Internship and Outreach**

There was discussion of what constitutes a “minority” and there is a need to define it clearly. Participants felt that universities throughout Virginia have many students who would be excited about a paid internship. It is key to create relationships with universities outside the metro Richmond region. Another way to improve minority outreach would be to look at the Library’s difficult history—as many colleges, universities, and other institutions have—as part of 2023 and community outreach.

#### **Group II – John Metz**

**Attending:** *Foundation Board:* Carol Hampton, Mark Leepson; *Library Board:* Cham Light, Mark Miller, and Marcy Sims; *Staff:* Vince Brooks, Paul Casalaspi, Sonya Coleman, and John Metz

## **1. Space**

*Treasures Room/Gallery* – In terms of identifying impactful space-changing projects, the idea of a permanent display that provided access to treasures within the collections of the LVA really resonated with this group. The group envisioned several highly secure cases highlighting treasures from Virginia’s history. Materials in the cases would be rotated to ensure the preservation of the collections as well as to expose the public to a vast array of items of all types and from all periods in the Library’s collections.

*Space to relax – a community commons on the 1<sup>st</sup> floor.* This group also focused its discussion on first floor space planning. They felt that the first floor provided a prime venue for a “third space” where the public could relax and meet informally. This, they believed, would attract a great deal of use given the location of the shop and once we replace the café (and eventually act on plans to move its location to the front of the lobby). The lobby is a natural gathering spot, and chairs and tables throughout the space would soften the sterile, clinical feel that many now find off-putting. Group members felt that these changes would be optimal if they were visible from street, but that even being able to see a lobby bustling with activity once you entered the 24-hour vestibule would help.

Related enhancements that would augment the impact of making flexible changes to the first floor as a meeting area (flexible enough to allow for re-configuration for events and programming) included a digital screen or marquee on the front of the building, like the idea proposed by the architectural firm HM2, to advertise Library events.

Other ideas discussed included opening up the main entrance to allow a better view of the interior and creating a visible work area to highlight conservation or processing. The group thought that this venue might be especially helpful in highlighting and promoting the Adopt Virginia’s History program. However, the group recognized that these ideas might not be possible given the proposed budget.

## **2. Access and Reach**

The group unanimously agreed that the Library’s top priority was to extend community programming and outreach across the state. The group decided that putting money towards these efforts might achieve a great deal of “bang for the buck,” especially in areas where the Library had already established a presence and a reputation for excellence, including genealogy workshops and traveling exhibits. They felt that investing in distance learning would achieve outreach and programming goals most efficiently and could most easily expand our audience to a national or even international scale. Once again, workshops and presentations related to Virginia genealogy would have the broadest appeal.

The group also believed that *Virginia Untold: The African American Narrative* should be a funding priority given what we have done so far with so few resources and staffing. They felt that *Virginia Untold* has the potential to become an essential and highly regarded research tool for African American genealogy. Other potential sources for fundraising included building and highlighting collections to reflect diversity and investing in our marketing efforts.

### **Group III – Catherine Fitzgerald Wyatt**

**Attending:** *Foundation Board:* Bessida Cauthorne White, Lara Wulff; *Library Board:* Shelley Murphy; *Staff:* Connie Warne, Vanessa Anderson, Catherine Fitzgerald Wyatt.

This group discussed the importance of the “experience” that patrons have with the Library, both in person and online. They emphasized that providing a good patron experience is something the Library already does, but they felt the Library could develop ways to capture the patron experience and then share and promote it to a wider audience. This could be done on via social media, *Broadside*, etc. An online experience, for example could be to offer an “Ask the Librarian” live chat as an enhanced way to answer patron questions. Finally, the group agreed that the upcoming anniversary should be a point of celebration for the Library.

The group also discussed a variety of fundraising strategies, which included a 100 percent giving rate by both boards and the staff. For patrons and those who attend Library programs or events, we should follow up immediately after the interaction to cultivate interest in and donations to with Library – send a follow up email or letter after someone attends a program at the Library. The group also discussed how we might use social media to raise funds. The group discussed the Literary Awards as a way to raise dedicated funds to do things like pair aspiring students writers with Literary Award authors during a special luncheon/event the weekend of the Literary Awards. This is not only a fundraising opportunity but also a way to engage the next generation with the Library. Raising money for collections is also an important funding priority and we should actively seek super funders (patriotic patrons) to help us acquire premier items and collections. Finally, the group stressed that we need to promote and share our successes in fundraising to raise awareness among new potential donors.

The group had a lively discussion around both short and long term work that can be done to encourage diversity in both the profession (generally) and at the Library (specifically). Specific strategies included establishing an endowed position or program at the Library such as a curator of African American history. They also saw an opportunity in the library science program that Old Dominion University will begin offering in 2019. They felt this provided an opportunity to work directly with library science programs and students (particularly with underrepresented students) to introduce them to the field and the institution as a career path. The group also felt that cultivating interest in the library sciences could begin with outreach to children at the elementary level to introduce them to library science. To that end, the group

thought it might be worth considering establishing a children's/and young adult section at the Library

The group also discussed the importance of collaborations. Shelley Murphy talked about the importance of the Library collaborating with other institutions around shared and related resources. She gave the example of partnering with the International Slavery Museum in Liverpool (<http://www.liverpoolmuseums.org.uk/ism/>) as a way to help African American genealogists with their family histories.

As for space planning, this group this group prioritized the lobby as the first place to begin to transformation of the Library's spaces. Shelley Murphy suggested having a "manager of first impressions," or the first point of contact for a patron entering the building as a way to enhance the visitor experience at the Library.

#### **Group IV – Nan Carmack**

**Attending:** *Foundation Board:* Heath Lee, Anna Moser, Joseph Papa; *Library Board:* Kristin Cabral, Blythe Scott, David Skiles, *Staff:* Nan Carmack, Kathy Jordan, Dale Neighbors,

The group used the sections in the board book as the template for our conversation, as well as the three themes of Literature and Literacy, Family and Community History, and Civic Engagement. In discussing the reimagining and repurposing of library space, conversation centered on the positioning of security, how space presentation affects patron use, the café as the critical driver to enter the Library, and the shop as supporter once there. The group also felt it was important to have varying types of spaces for patrons, organizations and events to accommodate varying opportunities or types of engagement, such as smaller spaces, study rooms, a "town square," research space, and flexible space.

In discussing transforming access and research, the group suggested "softening the image of the ivory tower." First, it is important to democratize programming and not rely solely on scholarly lectures. It might also be good to provide directional assistance/concierge services. Finally, the group felt strongly about the need to implement minority scholarships, internships, and fellowships.

Considering a \$2.5 million dollar target budget, the group ranked funding priorities in the following way:

##### A. Library Space:

1. Move café to the front of the building with shop attached.
2. Redesign the placement and implementation of security.
3. Lobby environment transformed to casual meeting/seating; soften with greenery
4. Provide directional assistance (possibly with docents or volunteers)

B. Access and Reach:

1. Continue to focus, promote and develop Virginia Untold
2. Minority Fellowship
3. Digitization of collection

The group briefly discussed what the General Assembly might legitimately fund and what the Foundation and the Library should address through fundraising. The group felt that the legislature should/could/would fund items directly related to the codified mission of the agency: Virginia Untold and collection digitization. The remainder are potential naming opportunities for donors, such as lobby space, café and shop, the fellowship.