



City of Homer

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Homer Public Library

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Memorandum

TO: LIBRARY ADVISORY BOARD
THROUGH: DAVID BERRY, LIBRARY DIRECTOR
FROM: MARCIA KUSZMAUL, LIBRARY ADVISORY BOARD CHAIR
DATE: JULY 29, 2019
SUBJECT: LIBRARY GIFT POLICY/PLANNED GIVING PROGRAM

Per our previous discussions on creating a Planned Giving program for the Homer Library, I have recommendations for next steps and ask the LAB to approve moving forward as follows:

1. I encourage all LAB members to review the following materials:
 - "Leaving a Legacy Through Planned Giving" webinar (slides in packet) from United for Libraries. This webinar lasts 30 minutes and is accessible through the trustee login. The slides are included in the packet for the August LAB meeting.
 - ALA resources on "Implementing a Basic Planned Giving Program." The text of this website is also included in the packet.
2. Update library gift acceptance policy to align with current or revised city policy and to include wider range of gifts
3. Develop planned giving program with professional assistance (we might need to ask for funds to do this)
4. Develop stewardship program for donors making legacy gifts
5. Launch Program
6. Implement and market

As emphasized in the webinar and readings, this is not a quick process and requires patience and persistence and LAB participation. It is an important part of ensuring HPL is a well-funded and quality library services are available in our community in the future.

RECOMMENDATION

For discussion.

