E-Book Series

Using Little Green Light at Libraries

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TRACKING GRANTS

Introduction

If you're fundraising for a library, whether through a Friends group, foundation, or other entity, the funds you raise strengthen your library and your community at large. Fundraising for libraries also presents a unique challenge: Patron data isn't available to you, so it's up to your efforts to find potential donors and retain them. Since you can't rely on your library's patron database, it's critical that the names and contact information you gather are stored in a secure, accessible, and useful way so that you can steward donors.

But to effectively fundraise, you need to be able to do more than store names and gift details. You also need to be able to access and use that information in meaningful ways in order to build relationships and maximize your fundraising efforts on behalf of the library. That's where a donor management system comes in, and we're excited to show you how Little Green Light can support your work.

In this guide, we'll show you how to use Little Green Light to perform key functions:

- Track different segments of constituents
- Store constituent information and streamline the entry of that data
- Plan, create, and report on solicitations
- Manage events
- Track grants, major asks, and planned gifts

A special thank you to the following customers who shared their experiences using Little Green Light:
Rayme Romanik and Julia Grimes, Albuquerque Public Library Foundation
Lisa Ingalls, Beloit Public Library Foundation
Peggy Ramel, Howe Library Corporation

Section 1: Tracking constituents

It’s hard to raise money when you don’t know who your constituents are, or how they’re connected to your organization. When you create constituent records in Little Green Light, you’ll also be able to easily identify various segments of your constituents, such as board members, donors, volunteers, and members.

In this first section, we’ll explore how to use the following functionality to track your constituents:

- **Groups**
- **Donors versus nondonors via giving statuses**
- **Volunteers**
- **Members**

Groups

To easily track distinct categories of constituents such as board members, you can add them to a group called “Board Members”. This makes it simple to run a search on the Constituents page when you need to send board members an email or create a report on gifts made by board members. You can add other values under Groups to suit your needs by navigating to Settings → Menu Items.

Giving status

Since your constituency is made up of donors as well as other stakeholders, you need a straightforward way to know the number of donors versus nondonors in your database. Rather than creating a group to code constituents as nondonors, which would require you to manually update their group if and when they make a gift, you can rely on giving statuses in LGL to tell you this information.

Giving status (con't.)

Giving statuses are system-generated, which means they aren't prone to human error. A constituent with no gifts in LGL is identified as a nondonor; if you then enter a gift made by that donor, their status is automatically updated to "Active Donor" without your having to take any further action. Should you need to review your lapsed donors, you can search by the giving status of "Lapsed".

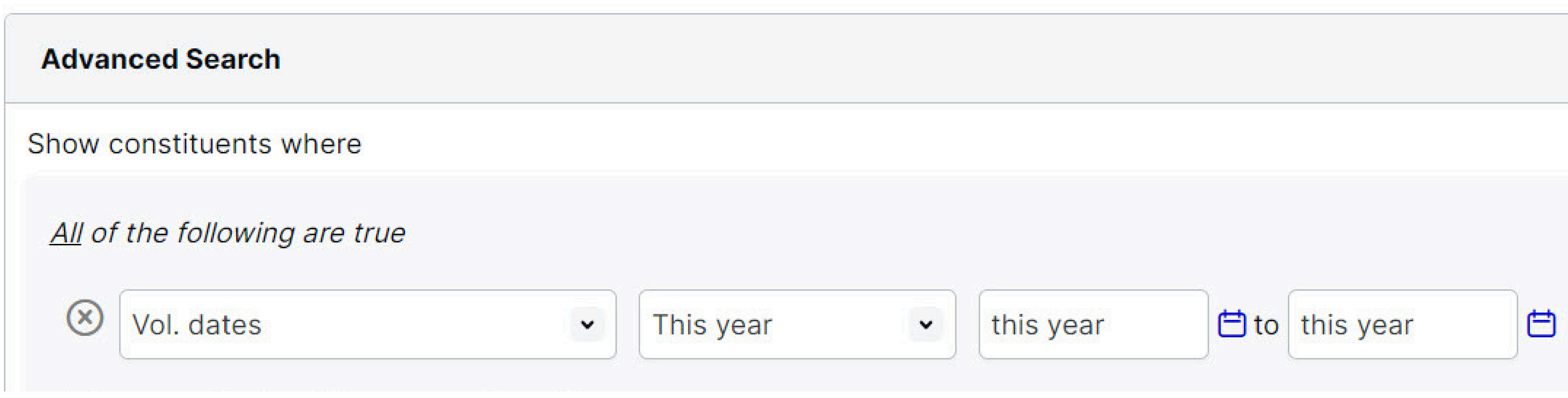
Volunteers

Just as donors provide essential support and need to be stewarded, so too do your volunteers. Little Green Light's volunteering functionality allows you to track and report on volunteers' hours of service. In addition, it's valuable to see your volunteer data side by side with their donation history, since volunteers are often good prospects for fundraising.

Under Activity → Volunteering, you can add a volunteer time record to document hours contributed by a constituent, as well as the category of volunteering they provided. When you use the volunteering functionality in LGL, it streamlines your ability to thank and recognize your volunteers for their efforts on behalf of the library.

Volunteers (con't.)

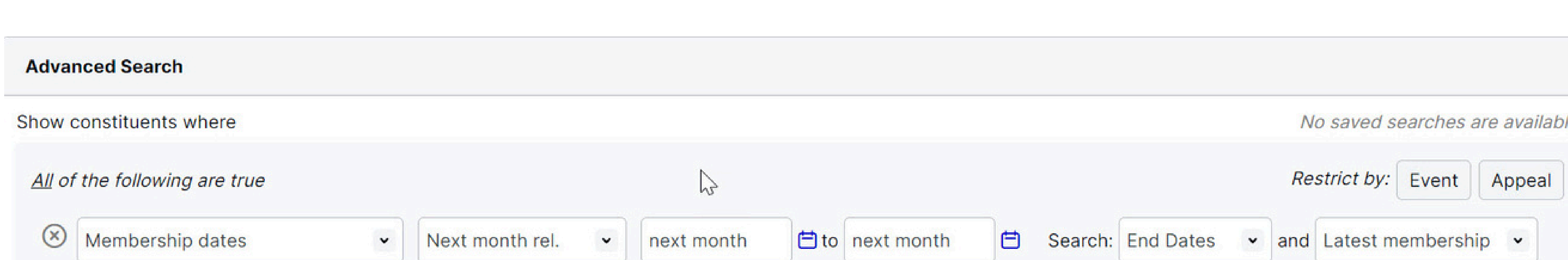
For example, on the Constituents page, you can search by volunteer dates to find all constituents who've volunteered in the past year so you can send a thank-you note or invite them to an annual volunteer luncheon.



If you need to find the total number of volunteer hours in a particular time period to include in a grant application or your annual report, you can access that information on the Volunteering page.

Memberships

Many Friends' groups rely on memberships as a key part of their fundraising efforts. You can enable the Memberships functionality in LGL under Settings → Subscription Settings to track membership levels, start dates, and expiration dates. You can rely on that data to send renewal notices to members whose expiration dates are approaching, or to send reminders to recapture those whose memberships have unfortunately lapsed



SECTION 1 RESOURCES

Best practices: Using groups in LGL

Constituent giving summary

Volunteering

Tracking memberships

Should your organization start a membership program?

Section 2: Expanding your donor base

Expanding your donor base is key to raising more money for the library. Without access to the library's patron data, you have to be diligent about collecting contact information, not just for current donors but also for people who interact with or show interest in the library. The next step is using that data in your efforts to convert these contacts to donors.

You'll need to consider where and how donors and prospective donors encounter the library, and set up systems to get that information into Little Green Light. While you can manually create constituent records, you can also explore other methods of getting data into Little Green Light. You never want to miss an opportunity to stay connected with people who've expressed interest in the library. For this reason, you can take advantage of LGL Forms, integrations with other software services, and the Flex Importer to make sure that names and contact information are all stored in one central place: Little Green Light.

In this section, we'll explore the following tools beyond manual entry that you can use to bring data into Little Green Light:

- **LGL Forms**
- **Integrations**
- **Flex Importer**

LGL Forms

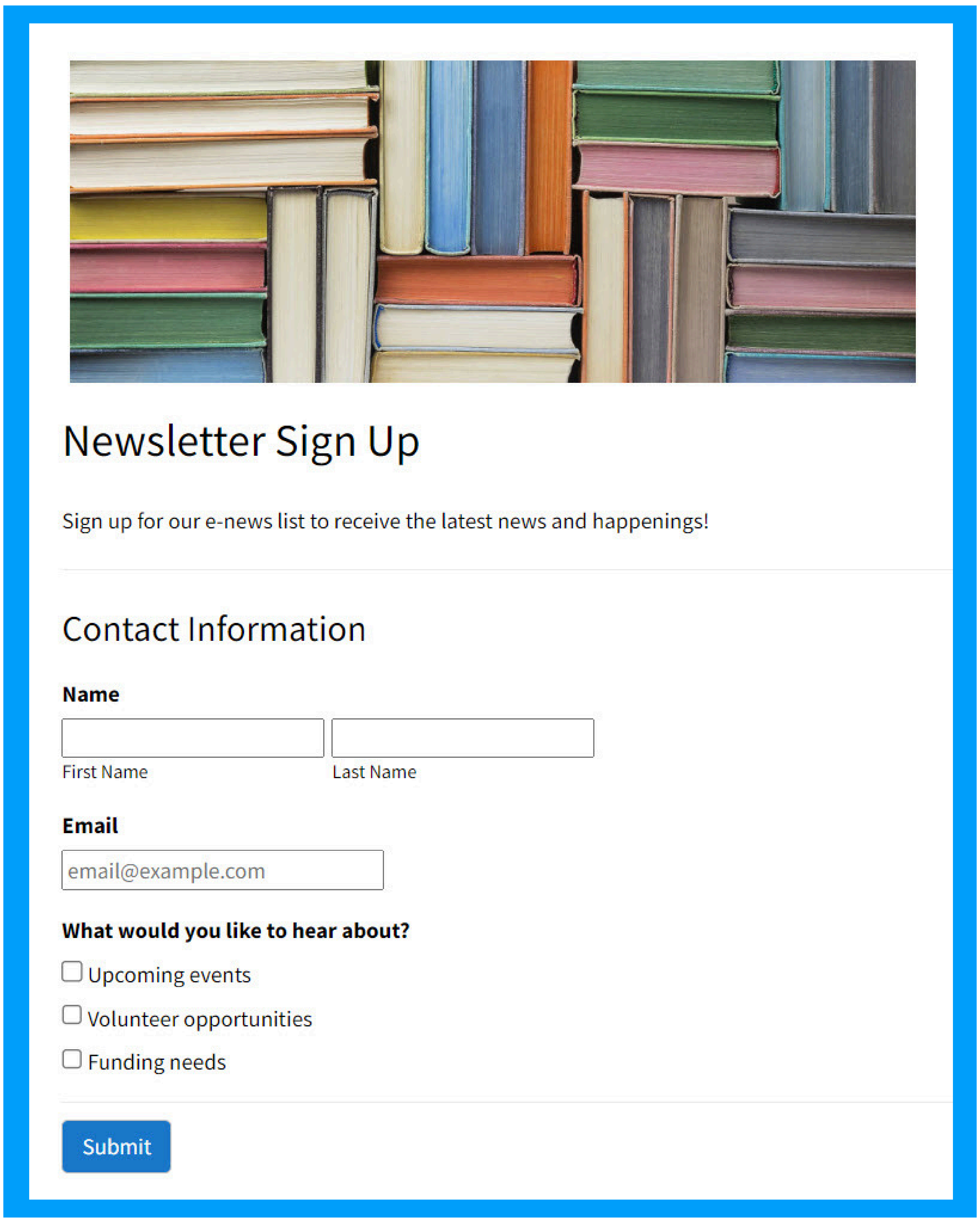
LGL Forms is a versatile tool designed to allow you to build forms to receive online donations. And while you can use LGL Forms to accept one-time and recurring gifts, you can also collect memberships with the forms, or build nonpayment forms for things such as newsletter signups.

Membership forms

If memberships are part of your fundraising plan to build support for the library, you can use LGL Forms to build a basic membership form. New members can use this to join your Friends group, and existing members can use this to renew their membership. You can map this form so the data flows into LGL, saving you from needing to enter the constituent data, along with membership level plus start and end dates, manually.

Newsletter signup forms

If you want to cultivate people who sign up for your organization's e-newsletter, you can use LGL Forms to create a nonpayment form that can help you accomplish that:



Newsletter Sign Up

Sign up for our e-news list to receive the latest news and happenings!

Contact Information

Name

First Name Last Name

Email

email@example.com

What would you like to hear about?

- [ ] Upcoming events
- [ ] Volunteer opportunities
- [ ] Funding needs

Submit

Newsletter signup forms (con't.)

When you map that form to LGL, those constituents will be saved in your database without your having to manually enter constituent records for them. And, if you use Mailchimp or Constant Contact for your email marketing, you can set your form up so those who fill it out are subscribed to Mailchimp or Constant Contact within LGL. With the integration between LGL and Mailchimp or Constant Contact, you can manage your subscribers in LGL and the data syncs over. You'll still design your marketing emails using the templates in Mailchimp, but you only need to maintain your email list in one place: LGL.

Flex Importer

There may be times when you collect data through other platforms, such as EventBrite or GiveLively. In those cases, you'll need to get those names and contact information into LGL. For small numbers of new records, you can enter the data manually. But in cases with many rows of data, you can upload spreadsheets of that data using the Flex Importer.

As long as you can export your data into Excel from the other platform, you can import it into LGL using the Flex Importer. That way, you can include these constituents in your ongoing communications and solicitations.

SECTION 2 RESOURCES

Introduction to LGL Forms

Subscribe your LGL Forms users to Mailchimp or Constant Contact

Mailchimp integration

Constant Contact integration

Using the Flex Importer

LGL User Training: Importing Fundamentals

Tracking memberships

Build and map a basic membership form

Section 3: Planning, creating, and reporting on solicitations

A successful fundraising appeal requires careful planning, execution, stewardship of donors, and followup. Using the Appeals functionality in Little Green Light helps you stay organized, target your mailing effectively, and be able to report on the amount raised through this specific effort.

In this section, you'll get familiar with the following:

- **Appeals**
- **Appeal segments**
- **Reporting on your appeal**
- **Fundraising views**

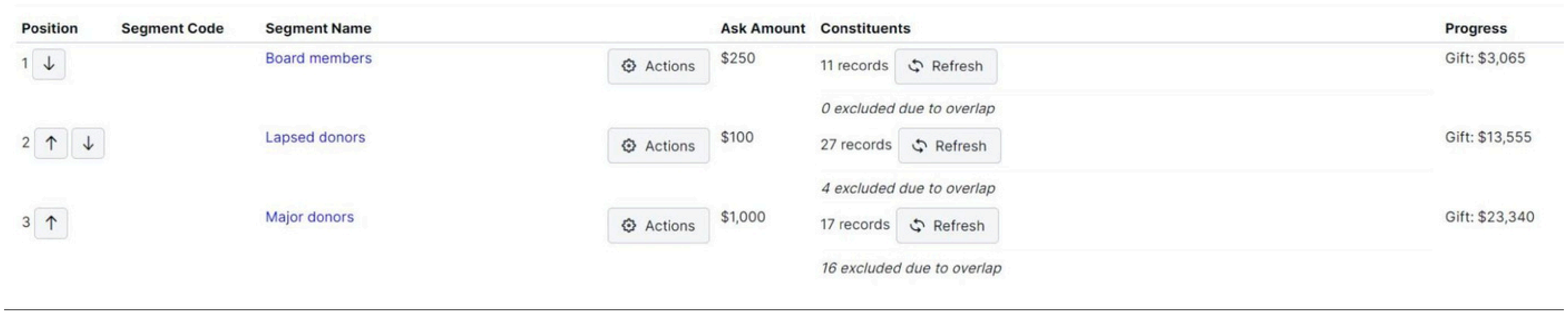
Creating an appeal

By navigating to Fundraising → Appeals and creating an appeal in LGL, you'll be able to track which constituents were solicited and easily report on how much was raised.

Adding constituent records to your appeal helps you manage and measure the appeal's effectiveness. By adding everyone to the appeal who will receive the solicitation, you have the ability to track the appeal response rate and determine who was asked to donate and either did or didn't. When you add constituents to your appeal in LGL, an Appeal Request is added to the constituent record, which means you can run a constituent search by appeal to find all constituents who were asked to donate to that appeal.

Creating an appeal (con't.)

If you want to be targeted in your approach, you can add segments to your appeal. Appeal segments refer to groups of constituents within your appeal who share a commonality. One segment could be board members. Other examples of segments are donors whose total giving amount is above a certain threshold, or first-time donors in the last year. A constituent can only be included in one appeal segment, so you won’t need to worry about duplicating constituents in your appeal segments.



Position	Segment Code	Segment Name		Ask Amount	Constituents	Progress
1		Board members	Actions	$250	11 records Refresh *0 excluded due to overlap*	Gift: $3,065
2		Lapsed donors	Actions	$100	27 records Refresh *4 excluded due to overlap*	Gift: $13,555
3		Major donors	Actions	$1,000	17 records Refresh *16 excluded due to overlap*	Gift: $23,340

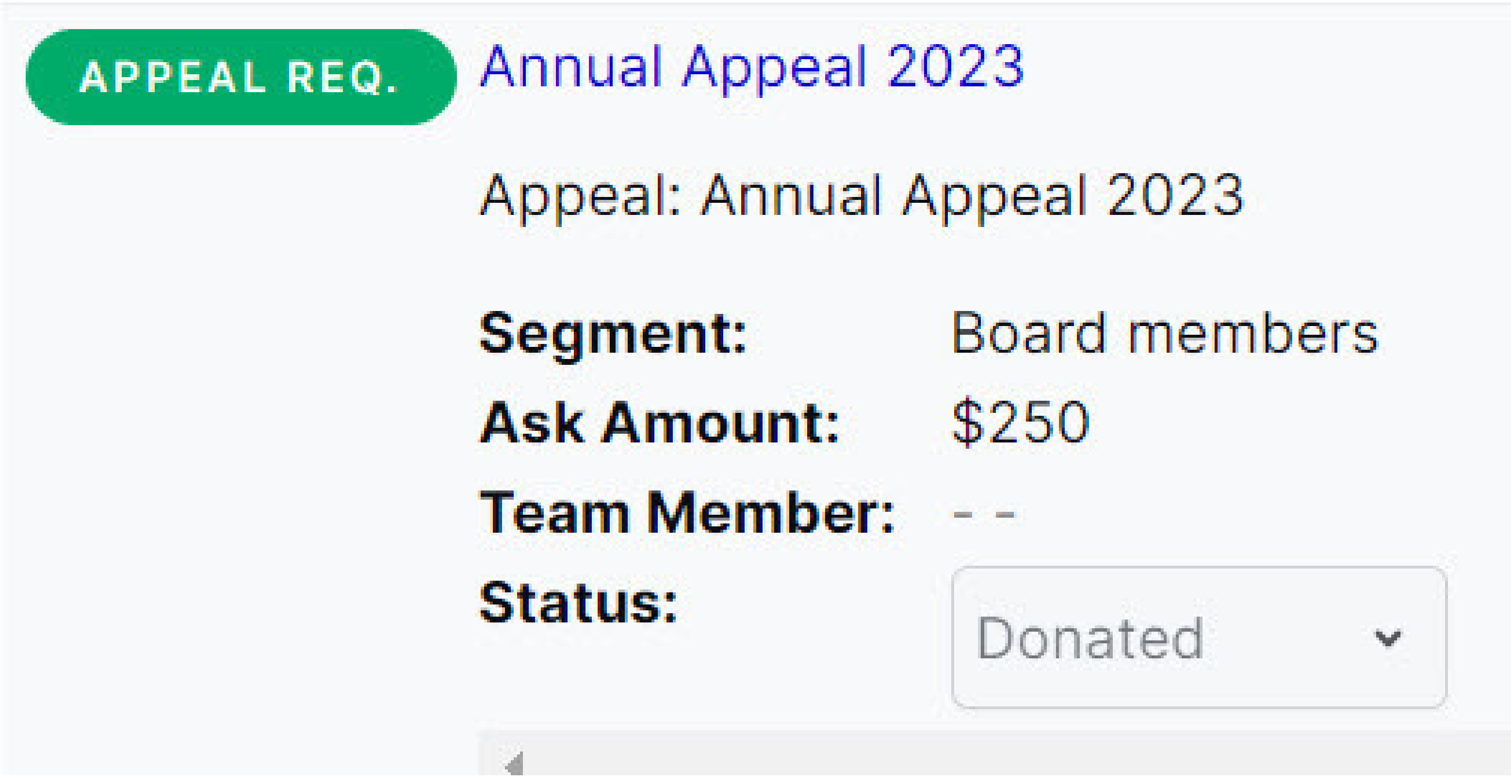
With your appeal segments set up, you can modify the content of your appeal letter for each segment and set ask amounts; either default amounts by segment or customized ask amounts for specific constituents. By using LGL merge fields and the Mailings functionality, you can pull personalized information such as names, addresses, and appeal ask amounts into your letters.

Online donation forms

In section 2, you learned that you can use LGL Forms to build forms to accept online gifts, which are processed through a payment processor like Stripe. You can map the field from your payment form to fields in your database so that the data flows into LGL without needing to be entered manually.

Entering and acknowledging gifts made in response to an appeal

When you create a gift record in Little Green Light manually, you can code the gift to a particular appeal. This way, you'll be able to determine how much was raised as a result of the appeal. Since the constituent record was already added to the appeal, coding the gift record to the appeal will update the constituent's appeal status to "Donated".



You can run a search on the Constituents page using the "Appeals (giving)" search criteria to find all constituents who have a gift record coded to an appeal.

If you want to be as efficient with your time as possible, when you draft your appeal letter you can also draft the acknowledgment letter that you'll send to donors when they make a gift. Set the acknowledgment template for this letter as the default acknowledgment for your appeal, or even for a particular appeal segment.

When you enter a gift manually and code it to this appeal, the acknowledgment letter template will be assigned to the gift automatically. When you're done entering gifts for the day, you can go ahead and download your file of acknowledgment letters to print and mail.

Reporting on your appeal

In Little Green Light, you can run searches to find the totals you need. In the case of an appeal, you'll likely want to know how much money was raised by the appeal, as well as which donors contributed.

To find out how much was raised, you can navigate to Fundraising → Giving and search by appeal there. Your search results will include the records of all gifts coded to your appeal. Above your search results, you'll see the total amount of those gifts listed, which is a nice way to view on screen both the total raised and the number of gifts made in that time period. Note that if a constituent's name appears twice among the results of your giving search, it means they made two separate gifts that meet the criteria of your search, so their name is correctly listed twice: once with each of those gift records.

If you want to compare different appeals, you can set the date range for your search and select the "Giving by appeal" fundraising view:

Giving by appeal

Results 1 - 3 of 3

Appeal	Total Raised
Totals	$91,235
Annual Appeal 2021	$14,750
Annual Appeal 2022	$33,530
Annual Appeal 2023	$42,955

Reporting on your appeal (con't.)

Those searches were run under Fundraising → Giving. But if you want to find all the constituents who made gifts coded to your appeal, you will need to run a constituent search. When you run a search on the Constituents page by "Appeals (giving)", the number of search results is the number of constituents who donated to that appeal. If you run another search but this time by "Appeals", you'll find the constituents who were solicited for the appeal.

These two searches on the Constituents page can give you valuable insights into the success of your appeal, because you'll be able to determine the percentage of constituents who made a gift in response to your solicitation. An appeal in which you solicited 750 constituents and only 3 made a gift is not a high rate of response. On the other hand, a targeted appeal to 250 constituents, of whom 163 constituents made a gift, is a strong response rate.

Whenever you need to run a search in Little Green Light, take a moment to make sure you're starting in the right place: Do you need to run a constituent search or a giving search? If you run a search and are worried because you're seeing duplicate names among your search results, you probably ran a giving search from the Fundraising page when what you needed was a constituent search. When that happens, navigate over to the Constituents page and create your search there.

SECTION 3 RESOURCES

Appeals

Adding segments to your appeal

Your guide to writing a compelling appeal letter

Managing appeals in Little Green Light

LGL Training: Gift entry and acknowledgments

Guide to acknowledging gifts

Quick searching and reporting with Fundraising views

Section 4: Managing events

Using the Events functionality in LGL, you'll be able to stay on top of details leading up to the event, and afterward you can follow up with attendees and report on the event. You can track constituents who are invited to events as well as their RSVP status and their attendance. You'll be able to code gifts to the event so you can report on the amount raised, too.

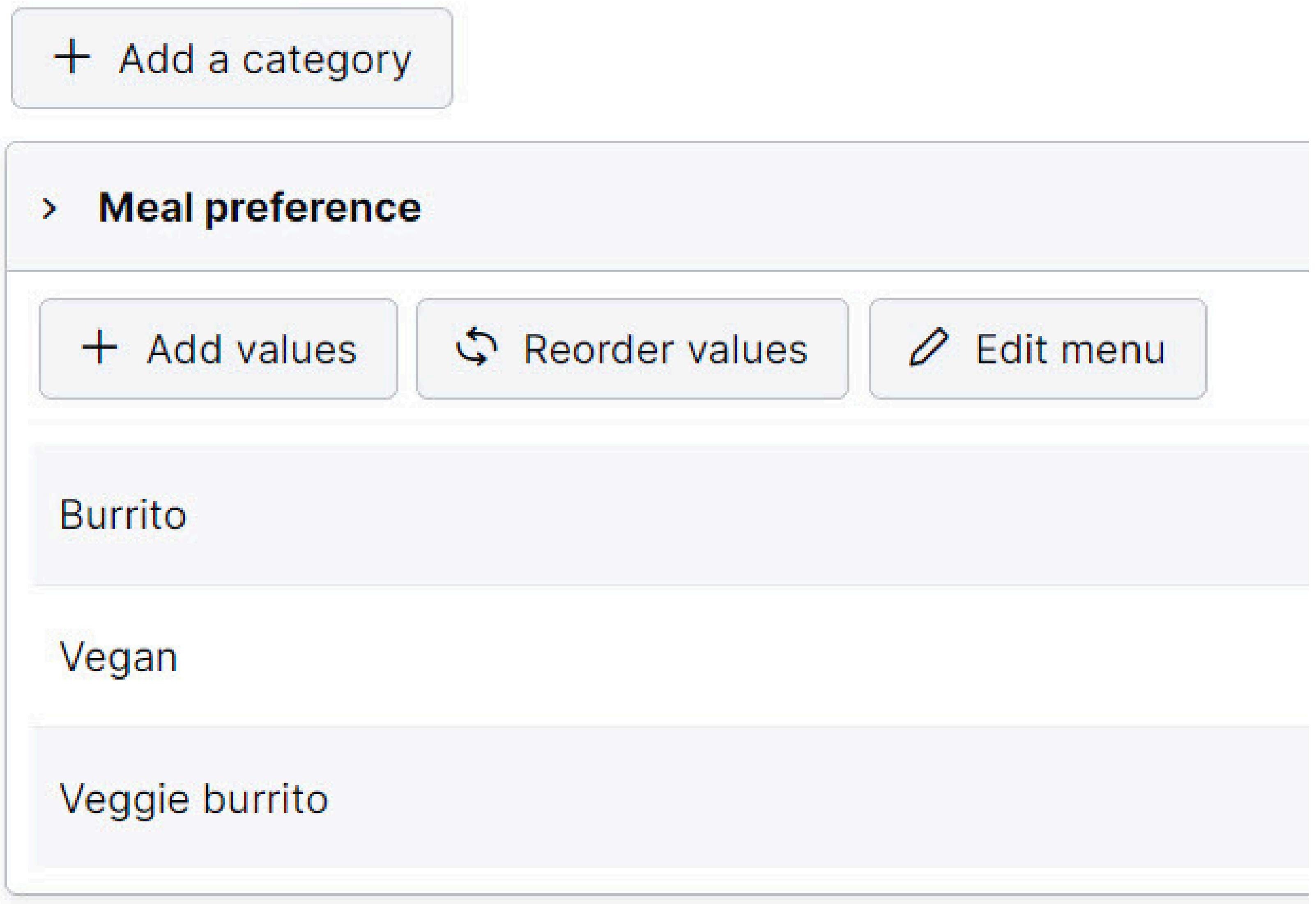
You can use the Events functionality in LGL in order to:

- **Create and customize an event**
- **Decide whether or not to use the optional setting for additional guest tracking**
- **Build a simple registration form**
- **Record contributions and other income**
- **Run constituent searches by "Events" and "Events (giving)", and know when to use which**

You can create an event under Fundraising → Events and then add to your event all the constituents you'll invite. Within your event, you might also add event segments, like you can for an appeal. For example, you might add a segment for potential sponsors, since you'll send them a sponsorship solicitation instead of the invitation you're sending to individual invitees.

Depending on the nature of your event, you might need to track additional event-specific details. For example, if you'll be hosting a book club on Wednesday nights and attendees can choose which section of the book club they want to participate in, you can create a custom category in your event. You could call it "Book Club Section" and add a value in that category for option: Fiction, Nonfiction, Mystery, Travel. That way, as invitees RSVP yes for book club, you can code them with that category.

If your event requires you to track meal preferences, that's another case where you can add a custom event category. You can call this category "Meal Preference" and add values for a burrito, veggie burrito, and a vegan option, too.



Optional setting: Additional guest tracking

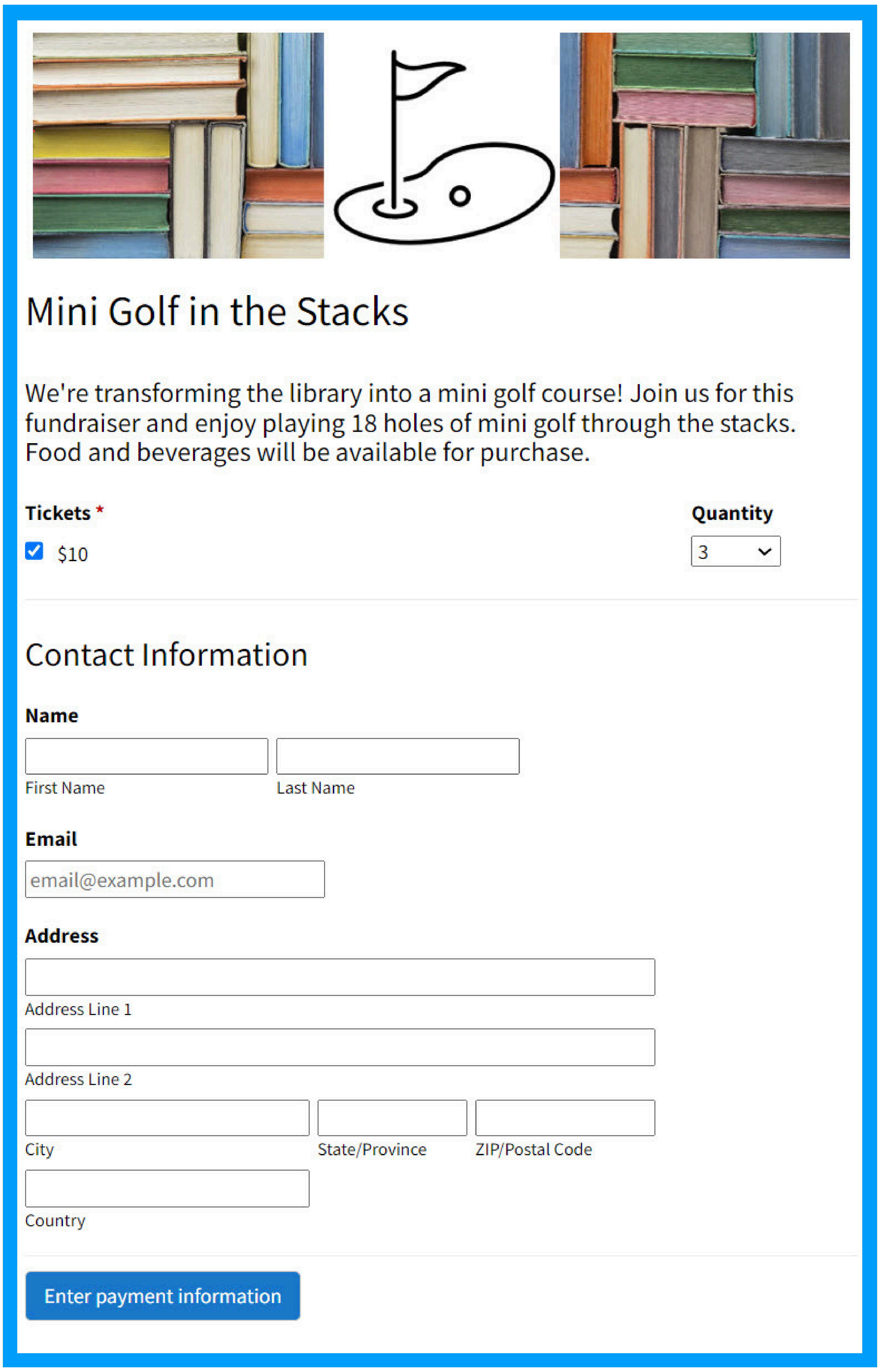
You can even use LGL Forms to accept event registrations. Before you start building and mapping an event registration form, though, you will need to decide whether or not to use LGL's additional guest tracking functionality.

If, in the case of the book club, the most important thing is to know how many people will be attending each section so you can set up enough chairs in each area of the library, you likely don't need to enable additional guest tracking.

But, if you're managing an event where you need to track details like meal preference for each attendee, rather than just the primary attendee, and print name tags for each attendee, not just the primary constituent, you'll need to enable additional guest tracking.

Building a simple registration form

Once you've made a decision about whether or not to use additional guest tracking in your event, you can start building a simple registration form using LGL Forms and map it to LGL so you don't have to manually enter all that data.



Mini Golf in the Stacks

We're transforming the library into a mini golf course! Join us for this fundraiser and enjoy playing 18 holes of mini golf through the stacks. Food and beverages will be available for purchase.

Tickets *

☑ $10

Quantity

3

Contact Information

Name

First Name

Last Name

Email

email@example.com

Address

Address Line 1

Address Line 2

City

State/Province

ZIP/Postal Code

Country

Enter payment information

“Other income” versus “gifts”

Participation in the book club may be free, but you might mention that donations are welcome. You might also have some merchandise, like I ♥ My Library magnets, for sale at the event.

When you enter funds raised by event, you can distinguish between charitable contributions and purchases by using different gift types. For charitable contributions, which are tax-deductible, you will assign the gift type of “Gift”.

When entering funds received for purchased items (such as magnets and tote bags), you will instead assign the gift type of “Other Income”. This gift type is used to code non-philanthropic contributions, such as the purchase of merchandise, which is not tax-deductible for the donor. When you assign “Other Income” as the gift type, the deductible amount will always be $0.

A note about anonymous gifts: If you have a donation box at events or keep one on the circulation desk for cash contributions, you won’t know who made those gifts. For those cases, you can create a constituent record in LGL with the name “Anonymous” and enter the gifts for that anonymous record.

SECTION 4 RESOURCES

Managing events in LGL (step by step)

Customize your event

Optional setting: Tracking additional guests

When to use the “Additional guests” setting in your event

Example form: Event registration

Mapping from LGL Forms to events with additional guests

LGL Training: Event registration forms

Options for recording anonymous donations

What event registration options are compatible with LGL?

Mapping events

How to make your events more meaningful

Section 5: Tracking grants, major asks, and planned giving

Whenever you prepare to solicit grants and larger gifts or planned gifts, you can anticipate having a lot of one-on-one interactions with constituents. As part of your preparation for these solicitations, you'll need to track grant applications and reporting deadlines; identify constituents with a strong giving history; schedule personal interactions with prospective major donors; and make sure top donors are stewarded effectively,

It's important to store these pieces of information in Little Green Light, because it means that the details aren't just scribbled on a notepad somewhere, or worse, only held inside your head. With these interactions documented in LGL, you and future staff will have a wealth of information that can be used to guide the stewardship and solicitation of major donors.

You can use the following functionality in LGL to support your efforts:

- **Goals**
- **Tasks**
- **Fundraising views**
- **BCC dropbox**
- **Donor stewardship widget**

Goals

You can use the Goals functionality in LGL to add specific fundraising goals to particular constituent records, whether it's an organization record or an individual record.

Goals are great to use when you're pursuing grants. You can add a goal to the organization record in LGL. Then, create related tasks to remind yourself of the grant's due date. You can also use goal statuses to track progress toward the goal. If and when a grant is received, you can connect the gift to the goal and mark the goal as complete. Then, you can add tasks for the interim and final reports that the foundation requires. No need to worry about missing an important deadline!

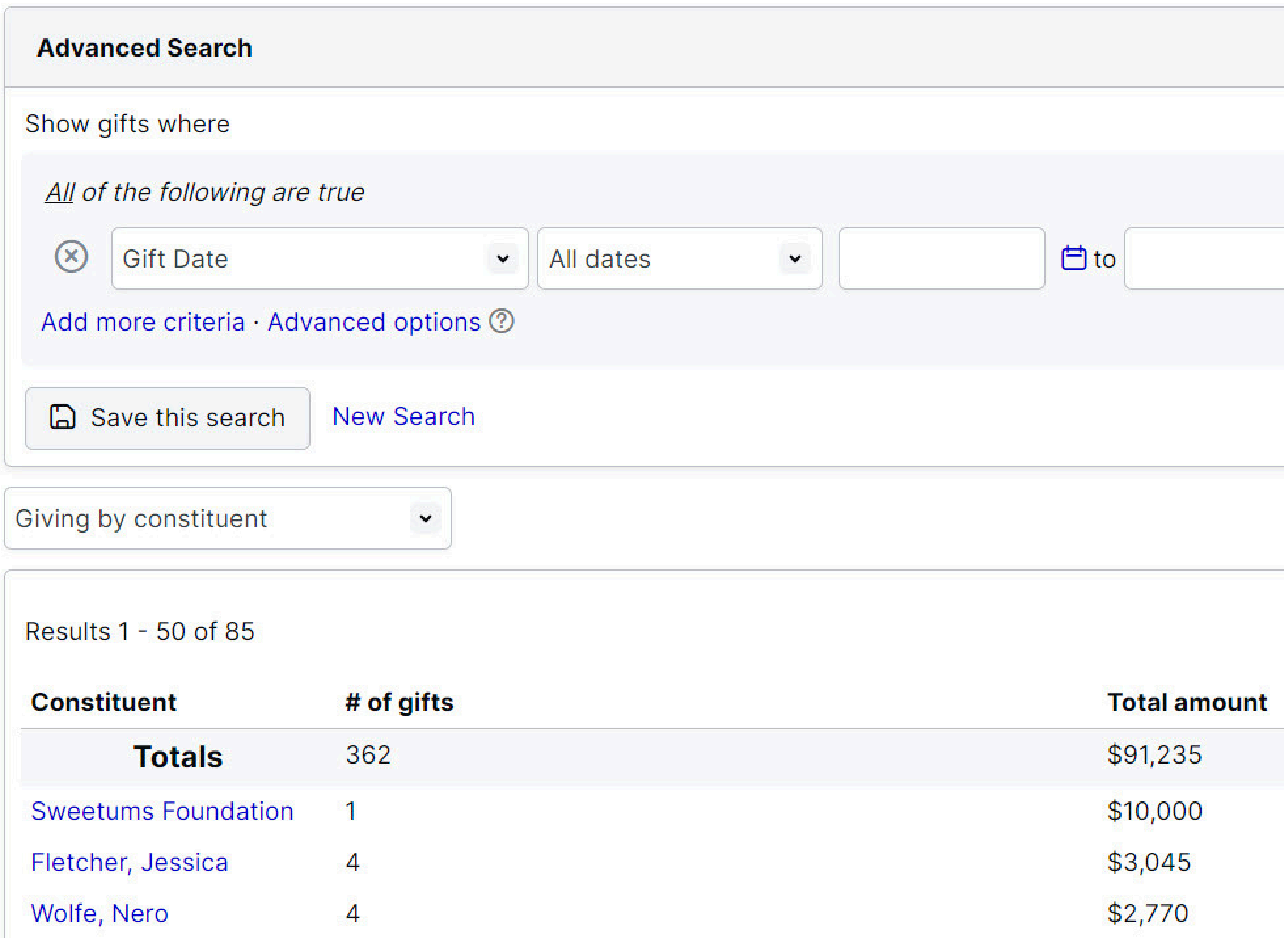
To quickly review the goals you've created, you can navigate to Fundraising → Goals.

You can also use goals for planned gifts like bequests. A goal works nicely for bequests as it can hold a high and low range. When you're notified about a bequest, you can add a goal to the individual's constituent record. When your organization receives the funds, you can connect the gift to that goal. In the meantime, if you need to add tasks related to the goal (e.g., checking in with the executor of the estate, etc.) you can do that, too.

Identifying prospective major donors

Before you start to solicit major gifts, you'll need to have a solid overview of which constituents have made the most gifts and their total giving amount so you know which constituents are promising prospects for major gifts. As a first step, you can navigate to Fundraising → Giving and make use of the fundraising view called "Giving by constituent".

Identifying prospective major donors (con't.)



Scheduling and recording personal interactions

When it comes to cultivating major donors, you'll likely be having a lot of personal interactions like phone calls and meetings. You can use tasks to stay on top of those, and afterward create contact reports to document the details of those personal interactions.

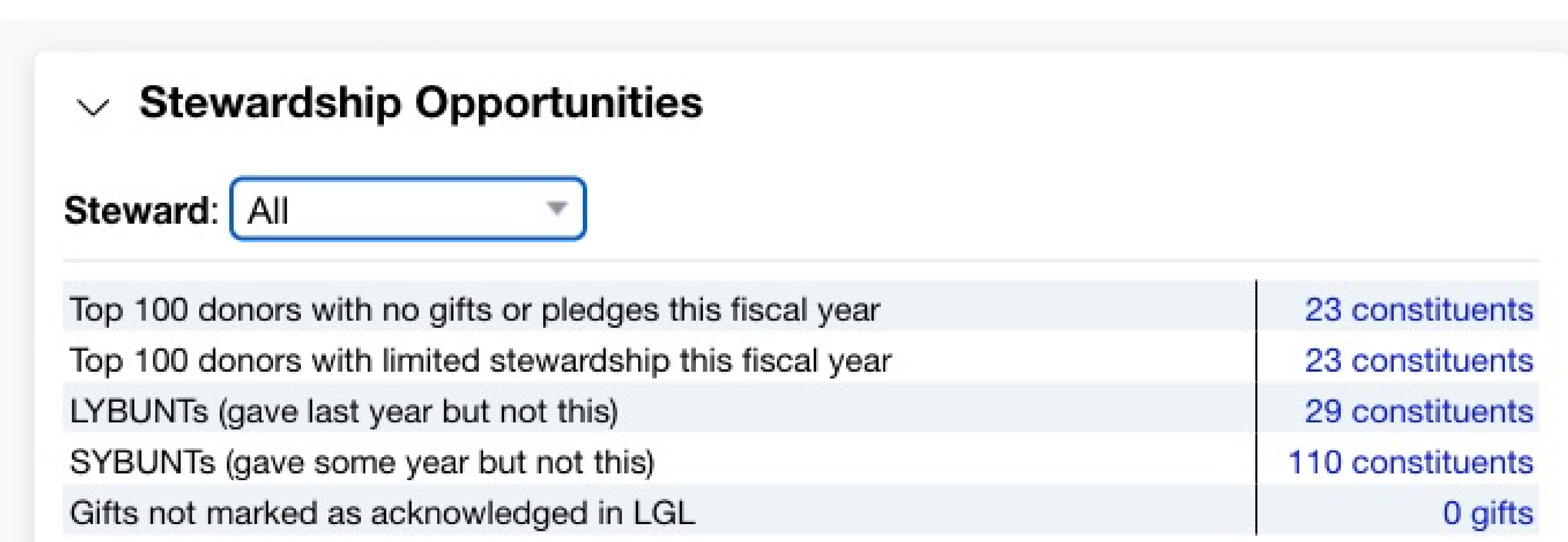
Contact reports are designed to record pertinent information from personal interactions. For example, you might have lunch with two friends who are looking to increase their philanthropy as they enter retirement. They're both avid readers and want to support the library. The contact report for one of the friends might mention that she still has two kids in college so she wants to volunteer for now, and will consider a major gift in the next two years; while the other's contact report for that same lunch would record that she wants to be involved in organizing the annual booksale, and plans to make a year-end contribution.

Creating contact reports with the BCC dropbox

Some of these constituents may not be available for calls or meetings, or they may prefer written communication. In those cases, you can create contact reports by sending email to your LGL dropbox, which you can enable under My Profile → Dropbox. Whenever you add your dropbox email address to the BCC line of an email you send from your email account, it will be recorded in LGL as a contact report, with the content of the email.

Donor stewardship widget on the dashboard

The Stewardship Opportunities widget on your dashboard lets you quickly see if any of your top donors have limited stewardship this year. This means they haven't had a personal interaction that's been documented in LGL. If that's the case, you can make a plan to connect with that donor.



SECTION 5 RESOURCES

Using fundraising goals for major gifts or grants

Tasks

Contact reports

Create contact reports by bcc'ing or forwarding email to your LGL dropbox

Your dashboard

How small shop fundraisers can steward major donors

How to start a planned giving program without a planned giving officer

Organizing your campaigns, funds, events, and appeals

CONCLUSION

We hope this guide has demonstrated how you can use Little Green Light to streamline your work and increase the success of your solicitation and stewardship efforts on behalf of your local library. As you continue to get familiar with using Little Green Light for your own organization, there are a number of resources you can refer to.

Our Knowledge Base and Video Library are the first places to learn about LGL. There you'll find articles about every feature and videos about the most commonly used features, as well as recorded webinars on topics like using appeals, event management, and the fundamentals of importing data.

If you're looking for guidance on general fundraising tips and best practices, like how to launch a planned giving program without a planned giving officer or how to read nonprofit financial statements, check out Little Green Light's blog.

Our Basic Training series is made up of six sessions, which we recommend participating in sequentially:

- Constituents 101: The basics of managing constituent data as well as a review of simple searching and filtering techniques. (2 sessions)
- Gift management 101: The basics of managing gift data as well as a review of the Acknowledgments process in LGL. (2 sessions)
- Reporting 101: The basics of generating reports in LGL. (2 sessions)

Each session lasts one hour and focuses on a specific area of functionality. Sessions are interactive, and time is allotted in each to answer participant questions. Recordings of these sessions are also always available for viewing in our Video Library.

We also offer a live Q&A session where we work through questions (submitted ahead of time) in a demonstration account. This is a great opportunity to watch an expert show you how things are done.

All of our one-on-one support is provided by email, so when you need help troubleshooting an issue head to the Help page in your account and send a message to our support team. We'll be happy to provide guidance. The Help page is also where you can register for a Q&A or basic training session.