

**CLEVELAND PUBLIC LIBRARY**

**Board Meeting**

June 18, 2019

**RESOLUTION TO ENGAGE JAROS STRATEGY LLC FOR CAPITAL FUNDRAISING  
CONSULTING SERVICES**

WHEREAS, The Cleveland Public Library has long been the recipient of generous donations from community members and well-known philanthropists alike; and

WHEREAS, The Library Administration recognizes the importance of strong community support and desires to engage the services of an experienced consulting firm to assist the Library in assessing and planning for a capital fundraising campaign; and

WHEREAS, Jaros Strategy LLC (“Jaros”) was founded in 2010 by Susan Jaros and has experience working with many of Northeast Ohio’s most important civic and cultural organizations and fundraising campaigns; and

WHEREAS, At the Library’s request, Jaros submitted a proposal to assist the Library in assessing the feasibility of a capital fundraising campaign, identifying key strategies for fundraising and communication, and identifying opportunities to expand the Library’s pool of engaged donors, for a total fee of \$75,000; and

WHEREAS, The Library Administration finds Jaros’ fee to be fair and reasonable and recommends that this Board authorize the Library to engage Jaros to provide capital fundraising consulting services; now therefore be it

RESOLVED, That the Board of Trustees of the Cleveland Public Library authorizes the Executive Director, CEO, or his designee, to enter into an agreement with Jaros Consulting LLC, subject to the approval of the Chief Legal Officer, to provide capital fundraising consulting services in an amount not-to-exceed \$75,000 (including reimbursables) to be charged to the General Fund Account 11200053-53710 (Professional Services).

**CONFIDENTIAL**

June 12, 2019

Felton Thomas, Jr.  
Executive Director, CEO

Shenise Johnson Thomas  
Chief of External Relations and Development

Cleveland Public Library  
525 Superior Ave.  
Cleveland, Ohio 44114

Dear Felton and Shenise:

Thank you for requesting that our team submit a proposal for consulting services at this important moment of growth and opportunity for the Cleveland Public Library. It would be an honor to partner with you and bring our experience in planning and managing capital as well as comprehensive campaigns to bear on your ambitious and exciting goals.

As we discussed when we met, our firm is unique in that we integrate fundraising and communication strategies for our clients. Our strategic recommendations to clients are developed through a thoughtful process of research, discussion, deliberation and prioritization that involve a team of key staff and board leaders. Ours is an approach that is at once structured and organic, directed and evolving.

We understand that the Cleveland Public Library is our client for this project, but also understand we will be working with the Foundation as we undertake to assess the Library's readiness to embark on a major campaign and to create a plan for mounting a successful initiative.

Please feel free to reach out to me with questions. Our process at JarosStrategy is interactive. We personalize our work for each client and always welcome your feedback or suggestions as we begin to lay the groundwork for the opportunities ahead.

Again, I am are delighted to submit this response to you. Thank you very much for the invitation to propose our team's consulting services.

Sincerely,



Susan Stevens Jaros  
President

## **PROPOSAL FOR CONSULTING SERVICES**

### **PRESENTED TO CLEVELAND PUBLIC LIBRARY**

#### **I. Consulting Objectives\***

- Determine the scale, scope and readiness of the Cleveland Public Library to embark upon a major fundraising campaign to meet capital needs identified in its Master Plan as well as support for Library Collections and Programs
- Based on the assessment, identify key strategies for fundraising and communications that would allow the Cleveland Public Library to successfully mount a campaign
- Identify opportunities to expand the library's pool of engaged donors and prospects

*\*See full set of deliverables below.*

#### **II. Consulting Services**

Our team brings a passion for fundraising. We relish our work with signature Northeast Ohio institutions and organizations – assessing, sharing experiences and expertise, leading staff and board teams to breakthrough ideas, setting objectives and creating plans that are at once nimble and disciplined to ensure the realization of desired results. We integrate development and communications strategies and apply this combined perspective to the opportunities and challenges of each client.

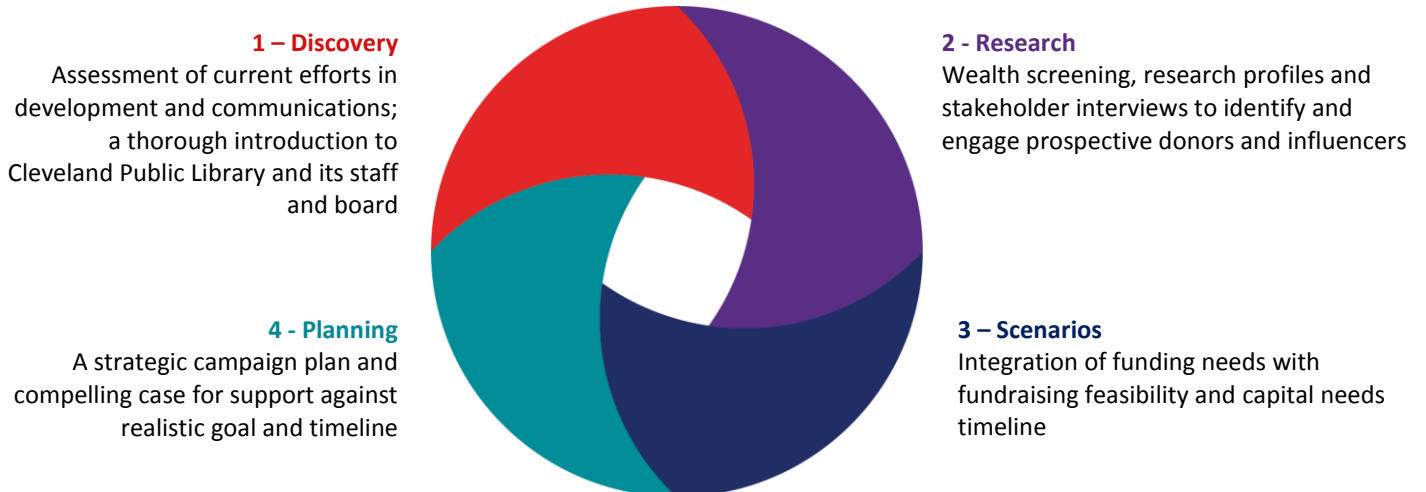
Our strategic recommendations to clients are developed through a thoughtful process of research, discussion, deliberation and prioritization that involve a team of key staff and board leaders. Ours is an approach that is structured and organic, directed and evolving. We bring a solid appreciation for process and an ongoing willingness to adapt planning to accommodate for emerging needs or unanticipated occurrences.

### III. Recommended Scope of Work

Our process will start with a period of discovery and learning about Cleveland Public Library, including a thorough review of current fundraising, marketing, programs and more.

We will work with you through a series of workshops with a core group of staff and advisory board leaders that we call the "Project Leadership Team" (PLT). Participation on the PLT helps board and staff invest themselves in the process and determine their role in the ultimate fundraising campaign.

Following our discovery and convening the first PLT meeting, we will begin to move through four phases of work: Discovery, Research, Scenarios and Planning.



#### **Our *Discovery and Research* phases include the following efforts:**

- Review of current fundraising efforts and thorough analysis of donor and prospect bases
- Review of current communications efforts and an analysis of the organization's brand, mission and impact awareness in the community
- Peer research, reviewing fundraising and positioning
- Staff interviews
- Feedback on the current state of fundraising in the geographic target area, including competing fundraising campaigns
- Identification and research of donor prospects
- Facilitation of 15-20 stakeholder interviews

**Our *Scenarios and Planning* phases includes development of an actionable plan with the following deliverables\*:**

- Campaign timeline with goal milestones
- Funding priorities and working campaign goal
- Gift table scenarios
- Campaign case and message platform
- Campaign leadership and engagement structure
- Roles for staff leadership and Board of Directors
- Identification of needed Board development and governance strategies
- Communications strategies to support campaign goals, aligned with institutional brand
- Budget for expenses, staffing, or contractors during campaign implementation
- Timeline with strategy for how campaign and annual fundraising will run concurrently
- Integrated capital construction/financing/fundraising/communications timeline

\*May vary based on assessment and recommendations

#### **IV. Timing and Fees**

We anticipate that the above consulting scope will require 8-10 months depending upon the availability of organizational leadership and the stakeholder interviewees. This project will require the organization's staff and various community leaders to participate in meetings, provide information, answer questions and review prospect and donor research and case for support materials as they are developed and in need of reaction and insights.

This scope of work will be billed as a project fee of \$75,000. Half of this fee would be invoiced at the beginning of the engagement, with the remaining half invoiced in six equal monthly increments after the work begins.

#### **V. Next Steps Together**

We look forward to discussing this proposed scope of work with you and refining it to most appropriately meet your needs.

Please see the addenda below for further information on our practice and team of consultants. You may also want to visit [www.JarosStrategy.com](http://www.JarosStrategy.com) for additional information and to read our team's full professional biographies.

## **ADDENDUM A** **Our Firm**

Our story begins in 2010 when JarosStrategy was founded by Susan Jaros and Cindy Fink after the two served together on the senior management team at the Cleveland Museum of Art during its \$350 million transformational capital campaign. After each left the museum to create her own independent consulting practice, they continued to collaborate with their unique approach of integrating strategies for fundraising and communications to drive revenue and secure sustainability.

Our clients turn to us, and often return for second engagements, because:

- we work exclusively with non-profits and have spent our careers working in the field.
- we have worked with many of Northeast Ohio's most important civic and cultural organizations and fundraising campaigns, so we have unparalleled knowledge of the local environment.
- there is no other team of integrated development and communications consultants working in Northeast Ohio with the depth of track record running fundraising campaigns in-house combined with rich, accomplished careers consulting non-profit organizations on campaigns.

We bring our entire team to each of our client projects, as we each offer something unique from our backgrounds and experiences. Our unified team approach also ensures that our client projects have a varied collection of perspectives and opinions coalesced into the ultimate consulting recommendations.



For a comprehensive list of services please visit [www.JarosStrategy.com/our-services](http://www.JarosStrategy.com/our-services).

## **ADDENDUM B**

### **Consultant Biographies**

Read more in-depth biographies at [www.JarosStrategy.com](http://www.JarosStrategy.com)



#### **SUSAN JAROS, Co-Founder and President**

For more than 30 years, Susan has provided exceptional fundraising counsel to diverse nonprofit organizations and has designed and executed major comprehensive and capital fundraising campaigns for educational and cultural institutions.



#### **JULIE CONRAD, Consultant**

Julie's communications work across diverse industries and organizations brings a valued perspective to JarosStrategy clients as she partners with organizations to define and persuasively tell their stories.



#### **JESSICA LEARY ALLEN, Consultant**

Jessica's work as an executive director and a development director inform her ability to help clients build campaigns and strategies, mindful of their resources, leadership and staff abilities.



#### **DEBRA HOLLANDER, Project Manager and Consultant**

Debra has a keen understanding of the interplay between fundraising and communications gained over two decades of working with a variety of nonprofits.

## **ADDENDUM C** **Client Roster**

Clients served by our consulting practice include:

Akron Civic Theatre	Judson Services, Inc.
Benjamin Rose Institute on Aging	JumpStart, Inc.
The Centers for Families and Children	Lakeland Community College
Children's Museum of Cleveland	Lakeland Foundation
Cleveland Botanical Garden	The Legal Aid Society of Cleveland
The Cleveland Foundation	Magnolia Clubhouse
Cleveland Hearing & Speech Center	MedWish
Cleveland Institute of Art	MetroHealth Foundation
Cleveland Metroparks	Museum of Contemporary Art Cleveland
Cleveland Museum of Natural History	The Music Settlement
Cleveland Pops Orchestra	Nature Center at Shaker Lakes
Cleveland Water Alliance	Near West Theatre
The Council for Economic Opportunities	NewBridge Center for Arts and Technology
Cuyahoga Valley Scenic Railroad	North Union Farmers Market
Geauga Growth Partnership	Progressive Arts Alliance
Gordon Square Arts District	Ronald McDonald House of Cleveland
Great Lakes Science Center	Stella Maris
Group Plan Commission (Public Square)	Sustainable Cleveland 2019
Hattie Larlham	University Circle Incorporated
Heights Arts	Vitamix Corporation
Inlet Dance Theatre	West Side Market (Ohio City Incorporated)
	Youth Opportunities Unlimited