

**YALSA Board of Directors Meeting
ALA Midwinter Conference, Atlanta
January 19-24, 2017**

Topic: Leadership Fundraising Campaign

Background: YALSA will celebrate its 60th Anniversary in 2017, a milestone that the Funder & Partner Development Standing Committee believes can be leveraged to renew understanding and support of the Leadership Endowment Fund. Sandra Hughes-Hassell has presented the proposal below for the Board’s consideration.

Action Required: Action

Supporting Organizational Plan; 3-Year Outcome: YALSA funding to support members and their libraries exceeds \$5 million per year.

Overview

YALSA’s Leadership Endowment was designed to generate income to support opportunities for the development and training of future YALSA and library leaders by capitalizing on the considerable contributions and talents of YALSA Past Leaders. The Endowment honors both those who created the fund and those who receive support from the fund. It is essential that this spirit of mentorship be maintained. At its inception in 2007, Past Presidents made the initial donations to get a fund started to create an endowment focused on leadership. By 2009 enough funds were collected to petition ALA to formally create the Leadership Endowment. The name and background information of the Endowment encourages participation from many types of sources while acknowledging the contribution of those Past Presidents who initiated the creation of the fund.

YALSA currently receives \$2,392 per year in interest from this endowment. In 2016 the Board voted to use \$1,000 of the interest to support the Dorothy Broderick Student Conference Scholarship and invest the remaining \$1,392 back into the endowment in to build capital to support the proposed PhD Fellowship.

Goals: The primary purpose of the YALSA Leadership Endowment of is to generate income to support the development of future leaders both within the association and throughout the profession in order to ensure the future growth of YALSA and the field of young adult librarianship.

Interest from the Leadership Endowment may be used for:

- scholarships
- fellowships and awards
- mentoring programs

- leadership institutes
- travel and workshop grants
- other leadership activities as determined by the Board

Proposal

Assemble a taskforce to create and implement a year-long fundraising effort to raise \$20,000 for the endowment, which will provide enough funding to support one additional leadership initiative, such as the PhD fellowship.

Rationale

- YALSA's Implementation Plan includes leadership-focused efforts that require additional funding beyond what is already in YALSA's current budget:
 - Funding an additional Spectrum Scholar each year will cost an additional \$6,500 annually
 - Creating and implementing a leadership development curriculum will require costs related to implementation, whether the efforts are in-person, virtual or a mix of both
- A group of YALSA members created a proposal for a PhD Fellowship a few years ago, which has not been approved by the board due to a lack of a funding source
- The anniversary provides an opportunity to celebrate the contributions of past and current YALSA leadership, thus reinforcing the importance of continuing to train YALSA and library leaders who will not only carry on the traditions of the past, but also forge the way for the continued future growth of the organization and the field.
- The moderate success of YALSA's 50th anniversary "give \$50 for the 50th" fundraising efforts suggests that leveraging an anniversary year is a worthwhile strategy to pursue
- FAC's workload is significant enough that taking on additional fundraising responsibilities is not feasible, so creating a taskforce is a good strategy

Proposed Taskforce Name and Charge

Leadership Fundraising Taskforce

Develop and implement a year-long fundraising effort to raise \$20,000 to support YALSA leadership initiatives, including marketing, fundraising, and donor recognition. Submit a draft fundraising plan to the board by April 1, 2017. Upon plan approval, work year-round with staff to create and implement virtual fundraising campaigns and fundraising efforts at conferences, aimed at both individuals (members and nonmembers), and organizations. Coordinate efforts with FAC so as not to overlap or compete with their work. Size: 7 virtual members, including the chair. Term: March 1, 2017 through January 31, 2018

Minimum Expectations for the Taskforce

- Plan and implement at least one virtual fundraising campaign aimed at both members and nonmembers
- Plan and implement a fundraising activity at the 2017 ALA Annual Conference
- Plan and implement a fundraising activity at the 2017 YA Services Symposium

Key considerations for the Taskforce

- A key part of fundraising is recognizing and cultivating relationships with donors. However, the method of recognition must not be equal to or greater than the contribution, because 1) the donor will no longer be able to claim their gift as tax deductible and 2) it does not position YALSA as an organization that uses its funds wisely. For example, someone who gives \$10 should not be thanked with a free ticket to the Printz Reception, because that's a \$29 value.
- Audiences to consider:
 - all YALSA members
 - any ALA member who serves youth
 - TRW registrants
 - TTW registrants
 - past and current donors
 - conference and symposium registrants
 - YA authors
 - Publishers and vendors
 - Past sponsors
 - current and past grant, scholarship and award recipients
- YALSA already sells items as a fundraiser. YALSA has a 'store' at its annual symposium, where things like T-shirts, mugs, bags, etc. branded with the YALSA logo are sold. All proceeds from the store typically go to Friends of YALSA (FOY)
- At the symposium, YALSA has typically held a raffle where proceeds go to FOY
- At the Coffee Klatch at Annual, YALSA has typically held a raffle where proceeds go to FOY
- Because of various laws governing fundraising, YALSA is not able to host some types of events. For example, online auctions and games of chance, such as bingo, used by some organizations use as fundraising vehicles, are regulated activities that typically require a license from the local or state government (or both). ALA's legal counsel has stated that these are not activities that YALSA is permitted to do.

Fundraising Examples for the Taskforce's Consideration

Met or Exceeded Goals

- **Giving Tuesday** – for the past three years YALSA has participated in this new event and netted an average of \$1,500 each year with a low level of time commitment from the committee and staff.
- **Symposium Raffle** - at past symposiums, a raffle has been held that nets between \$1,000 - \$1,500. Medium level of commitment of the Committee for a small return on investment
- **YALSA Store at the Symposium** - included t-shirts, mugs, and other items. Netted about \$4,000 with a medium level of time commitment from staff.
- **Coffee Klatch Raffle**

Met or Nearly Met Goals

- **Give \$10 in '10** - in 2010 members and other potential donors were asked to give \$10 to the association. Low level time commitment of Committee and staff, and could be implemented both virtually and at face-to-face events
- **Calendar** - In honor of the 12-year anniversary of the Michael Printz Award, YALSA developed a calendar to sell. High level of commitment of Committee and staff, with a moderate return on investment.
- **Month of giving** - in Aug. 2012 FAC sponsored a month of giving asking current and potential donors to give money to the association. Medium level of commitment of Committee and staff, with a good return on investment (about \$3,000)
- **Year-end Fundraising Appeal** -- held multiple times. Provides a moderate return on investment with little time commitment from the committee or staff.
- **Passing the Hat** -
 - when Past Presidents announced their commitment to establishing a Leadership Endowment, they 'passed the hat' at an All Committee meeting at conference and raised over \$1,100. This technique requires the least time and commitment from FAC or staff, but should be used sparingly for special circumstances.
 - At certain events, such as a YA Lit Symposium luncheon, FAC members and volunteers stood at the entrance and asked for donations. This technique requires the least time and commitment from FAC or staff

Failed to Meet Goals

- **Pay What You Can** - YALSA has held fundraising events, such as a YA Lit Trivia Contest, where participants, in lieu of a ticket fee, were asked to make a donation to YALSA. Events like this require a medium to high level of time commitment from FAC and staff, and the return was small.
- **YALSA's Birthday (June 24)** - In 2013 FAC members highlighted YALSA's birthday with an emphasis on FAC benefits at Annual, giving money and birthday cake contest to in a signed book and apron. The contest garnered little to no interest and yielded only a few donations.
- **Silent Auction** - at Midwinter 2011 (in San Diego) YALSA hosted an auction. Committees, publishers, authors and members donated items from baskets of books to author Skype visits. Attendees "bought" the items in a silent auction. High level of time commitment of Committee and staff. The event netted about \$2,000, which was not a large return on the investment of time and effort
- **Booze for Books** - in the spring of 2012 FAC sponsored a Booze for Books event that was met with some controversy. Some members and potential donors did not think that an organization working with teens should be using Booze as a fundraising activity. As a result, many library staff shied away from hosting a Booze for Books event which meant that the success of the fundraising effort was limited to about \$600.

Financial Impact

- Cost of staff and member time to coordinate planning and implementation of the campaign.
- Financial costs of creating promotional materials for the campaign (not to exceed \$500)

Measuring Impact

- Amount of funds that were raised
- Number of new donors brought in
- Ability of YALSA to provide leadership training and support a PhD Fellowship

Recommended Action

The Board directs the President to assemble a task force no later than February 15, 2017 to work with the YALSA staff to coordinate the planning and implementation of a year-long Leadership Endowment Fundraising campaign related to YALSA’s 60th Anniversary.

Additional Resources

- Leadership Endowment Guidelines:
<http://www.ala.org/yalsa/sites/ala.org.yalsa/files/content/aboutyalsa/yalsahandbook/endormentguidelines.pdf>
- Leadership Endowment: <http://www.ala.org/yalsa/givetoymyalsa/leaderendow>
 - Celebrating YALSA’s 50th Anniversary:
<http://www.ala.org/yalsa/sites/ala.org.yalsa/files/content/workingwithyalsa/board/boarddoc/midwinter/pdf06/AnniversaryTFNo46.pdf>
 - <http://yalsa.ala.org/blog/2007/01/22/yalsa-50th-anniversary-task-force/>
 - <http://yalsa.ala.org/blog/2006/12/08/yalsa-turns-50-in-2007/>
 - <http://yalsa.ala.org/blog/2006/04/18/yalsa-is-50-in-2007/>
- Worksheet of Considerations When Planning Fundraising Activities

Idea	How will it Support YALSA’s Fundraising Goals/Who Will it Reach?	What Level of Committee Work is Required	What Level of YALSA Office Staff Work is Required	Comments
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**YALSA Board of Directors – Midwinter 2017
Leadership Fundraising Proposal
Item #38**

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