

TO: ALA Executive Board

RE: Report of the ALA Development Office

ACTION REQUESTED/INFORMATION/REPORT: Development Office report

CONTACT PERSON:

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DATE: June 5, 2019

BACKGROUND: The purpose of the ALA Development Office report to the ALA Executive Board Members is to provide an overview of the progress made by the American Library Association (ALA) and its units in their strategic fundraising efforts. The Office of ALA Development and ALA units expend significant effort in identifying, cultivating and soliciting major and planned gifts; participating in donor activities for purposes of relationship building, cultivation and stewardship; drafting proposals and meeting with individuals, foundation and corporate donors for cultivation and solicitation purposes.

ATTACHMENTS:

Fundraising Accomplishments

Following the list of accomplishments, further information about specific fundraising activities is listed to highlight the expanding role and reach of ALA. When appropriate, hyperlinks have been included to provide additional information.

Fundraising

- The Young Adult Library Services Association (YALSA), in partnership with the [Chief Officers of State Library Agencies](#) (COSLA), is continuing work on an IMLS grant of \$497,635 to implement the, [Transforming Teen Services: A Train the Trainer Approach](#) (T3) project. Launched in July of 2018 the project runs through June 30, 2021. The [T3](#) brings together state library agency (SLA) staff and frontline library staff from each U.S. state/territory for a robust training program that helps build knowledge and skill related to connected learning (CL), computational thinking (CT), and cultural competence. In the first year of the project, five states participated in training and a community of practice, and the learning from the pilot lays the foundation for T3 over the next two years.
- The ALA Public Programs Office has signed a three-year, \$663,000 agreement with the United States Holocaust Memorial Museum. With the funding, PPO and USHMM will tour a library version of their [Americans and the Holocaust](#) exhibition to public and academic libraries around the country. Applications for the opportunity will open June 17.
- PPO signed a \$25,000 agreement with the Yiddish Book Center in Amherst, Massachusetts. The funding will support a promotional plan to announce Coming to America, a reading and discussion program opportunity featuring Yiddish books in translation, to public libraries nationwide. Applications for Coming to America will open June 3.
- PPO received a \$50,000 grant from Acton Family Giving in support of PPO's longstanding Great Stories Club, a reading and discussion program that connects library workers with underserved youth in their communities. Thanks to the funds, the 35 participating libraries for the next series will be able to bring their community partners, representing alternative schools, juvenile detention facilities, and other organizations that serve youth, to the project's two-day training in Chicago, enabling greater collaboration.
- United for Libraries received a generous bequest from Jack Neal. Neal, who passed away in late February, was executive vice-president of Neal-Schuman Publishers from 1976 until 2011 when the company was acquired by ALA. United president Skip Dye has formed a task force to develop a plan for the funds to support a national training program for library Trustees and Friends.

Organizational Excellence

- The Development Office has completed hiring process and is fully staffed, per the investment budget approved by the Executive Board to begin in FY2019. The current Development Office staff include: Sheila O'Donnell, Director; Ryan LaFollette, Assistant Director of Major Gifts; Anne Manly, Assistant Director, Corporate and Foundation; Alice Burton, Development Communications Associate; Remigio Torres, Development Operations Associate; and Autumn Ni, Development Coordinator.
- Ryan LaFollette, Anne Manly and Autumn Ni participated in Donor Prospect Research training, April 15-19. The training focused on prospect development, stewardship and use of iWAVE and Foundation Directory.
- Ryan LaFollette attended Chicago Council on Planned Giving, Planned Giving training and annual symposium, May 23 and 24, 2019.
- Ryan LaFollette will present at the International Public Library Fundraising Conference, Calgary, CA, July 28-30.
- Remigio Torres and Autumn Ni joined the Association of Advancement of Service Professionals, and will monitor the impact of the current law changes on gift processing and acknowledgement.

- Alice Burton has been working to improve donor communications and integrate fundraising communications into other ALA communications channels.
- Sheila O'Donnell is a member of the ALA Executive Director Search Committee.
- The Development Office is working with the Public Policy and Advocacy Office and ALA IT to launch a pilot of the Salesforce CRM. Remigio Torres and Autumn Ni are the primary contacts to ensure fundraising data integrity as a part of this process. The plan is to use Salesforce to track advocates, donors and prospects in one system, including tracking information about their relationships to each other and others within the ALA universe. We anticipate that the improved data tracking will support our efforts to raise more funds for ALA overall. We are currently in the testing phase and will be able to use the new system immediately following ALA Annual Conference.

Philanthropy Advisory Group

The new Philanthropy Advisory Group structure was approved by the ALA Executive Board at the October 2018 Board meeting, and 12 members were appointed by the Finance and Audit Committee at their meeting on May 13, 2019. The first meeting of the PAG will occur at Annual Conference 2019. The purpose of the PAG is to advance the philanthropic/fundraising activities of the American Library Association, and to increase the level of external funding that supports the work of the Association. The following individuals were appointed to the PAG, and will serve terms between 1 – 3 years:

John P. Culshaw

Jack B. King University Librarian
University of Iowa Libraries
Two-year term

Rod Hersberger

Library Dean Emeritus
California State University, Bakersfield
One-year term

Lenore England

Retired – Asst. Dir., Electronic Resources Mgt.
University of Maryland, University College
Philanthropist for Innovation Management
Three-year term

Karlene Noel Jennings, PhD, CFRE

Executive Director of Development
UNC Greensboro, University Libraries
Three-year term

Barbara J. Ford

Mortenson Distinguished Professor Emerita
University of Illinois
Three-year term

Christina McClelland

Resource Development Officer
Denver Public Library
One-year term

Edward Garcia

Library Director
Two-year term

Robert R. Newlen

President
Dwight D. Opperman Foundation
Two-year term

Joyce Garczynski

Assistant University Librarian for Development
& Communications
Towson University, Albert S. Cook Library
One-year term

Blyne Olivieri

Head of Special Collections & Associate
Professor
University of West Georgia, Ingram Library
Two-year term

Mary Hastler

CEO
Harford County Public Library
Two-year term

Lorelei Rutledge

Faculty Services Librarian
One-year term

ALA Fundraising Priorities

Annual Fund

The Development Office launched an online mini-campaign in connection with National Library Week in April of 2019. We raised close to \$2100 through Facebook fundraisers and saw an increase in online donations related to National Library Week.

Immediately following Annual Conference, we will begin to work on planning and preparations for the Fall 2019 Annual Fund campaign.

Planned Giving

The Development Office has redesigned its Planned Giving marketing materials to make giving more approachable. We want to make it as easy as possible for ALA donors to give, making sure we are creating a seamless pipeline for Planned Giving that begins with the Annual Fund. The adoption of Salesforce will be a powerful tool in helping us identify giving patterns that indicate strong candidates for Planned Giving going forward.

Legacy Society and 1876 Club

The Legacy Society is the overall giving society for those who have made a planned gift to ALA. The 1876 Club is a donor circle within the Legacy Society, targeting individuals who are under 50 when they indicate their intention to make a planned gift to ALA.

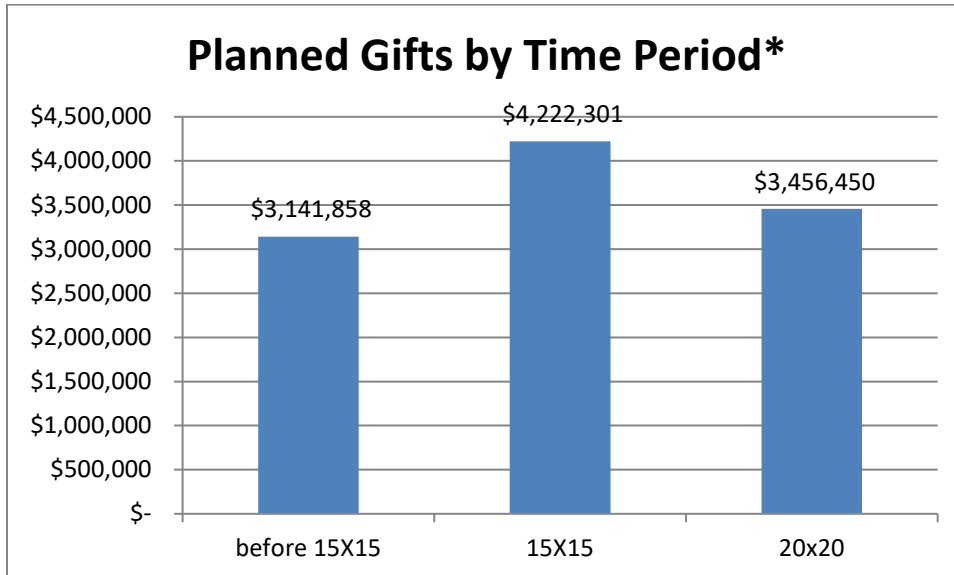
Planned Giving Activities in FY19 – FY20 include:

- Targeted mailing to 5,000 recipients, June 2019.
- Sheila O'Donnell and Ryan LaFollette met with potential donors at the ACRL conference in Cleveland to discuss planned gifts. Additional conversations are planned for the Annual Conference and at the AASL conference in Louisville, KY, November 14-16.
- Legacy Society Luncheon at Annual Conference 2019, to steward current Legacy Society members.
- Sweet Tea reception at Annual Conference 2019 to promote 1876 Club.
- Meetings at Annual Conference to promote Legacy Society and 1876 Club.
- With ALA units, identify prospects to approach for major and planned gifts.
- With ALA units, create solicitation documents which can be used during donor meetings.
- Ads in *American Libraries* promoting the Legacy Society and 1876 Club.

20x20 Campaign

The goal of the 20x20 Campaign is to bring our major and planned gift fundraising to a total of \$20 million by the end of 2020. This means a little more than \$10 million in new planned and major gifts. So far, we have received close to \$4 million in planned giving pledges to count towards the 20x20 campaign.

Here's more information about planned giving by time period:



Planned Gifts before 15x15 (prior to June 2012): \$3,141,858
 Planned Gifts during 15x15 (June 2012 – February 2016): \$4,222,301
 Planned Gifts to-date 20x20 (March 2016 – ongoing): \$3,456,450

Additional detail about the pledges reflected above:

New Planned Giving Pledges to ALA, March 2016 – June 2019		
	Approximate Pledge Amount	New Members
1876 Club	\$1,804,750	17
Legacy Society	\$1,651,700	14
Total	\$3,456,450	31

Libraries Transform Campaign Library Champions

The Communications and Marketing Office includes a full report on Libraries Transform Campaign in their report; please refer to that document for more information about Campaign activities since the April 2019 Board meeting.

The Development Office is undertaking a review of the Library Champions program, especially benefit levels and how those benefits fit in with the larger picture of corporate membership within ALA. To that end, the Development Office surveyed current Library Champion members to gauge their satisfaction and solicit feedback regarding member likes, dislikes, and ideas for future initiatives. In addition, Member Services and the Development Office came together to form corporate membership working group, collaborating with the CMO Office, Publishing, Conference Services, United for Libraries, and the Public Policy and Advocacy Office. The working group aims to diagram existing corporate benefit programs and create a unified plan to strategically maximize corporate member giving and boost the total number of corporate members and sponsors.

After experiencing a decline in Library Champions membership in the mid-2010s, membership in the program has stabilized. There are currently 25 Library Champions. OverDrive is the program's Lead Sponsor. Capital One is a new Library Champion at the Sustainer Level, as is Dollar General. FINRA and SAGE remain Investors at the \$10,000 and above level. Bound to Stay Bound and the Nora Roberts Foundations are Patrons at the \$7,500 level. Baker & Taylor, Brodart, Candlewick Press, Demco, EBSCO,

Elsevier, Gale, Ingram Content Services, Midwest Tape, Morningstar, OCLC, ProQuest, referenceUSA, Scholastic, SirsiDynix, Sister In Crime, Springer Nature, and Taylor & Francis are Members. In F18, one corporation, TLC, dropped out of the program, while Sisters In Crime re-joined after an absence of a year.