

**TO:** ALA Executive Board

**RE:** Report of the ALA Development Office

**ACTION REQUESTED/INFORMATION/REPORT:**

**ACTION REQUESTED BY:**

**CONTACT PERSON:**

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**DATE:** March 22, 2019

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## Executive Summary

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The purpose of the ALA Development Office report to the ALA Executive Board 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.

### **Fundraising Activities and Successes Across the Association**

- **ACRL and Friends Fund.** For the period January 1 – March 20, 2019, ACRL received \$7,932 in donations for the ACRL Friends Funds from 123 individual donors.
- **Census Project.** The ALA received \$75K from an anonymous donor to help libraries support the 2020 census. Library census efforts will focus on hard-to-count communities that are at a heightened risk of an undercount.
- **Cultural Communities Fund.** PPO is pleased to report a significant fundraising achievement for the Cultural Communities Fund (CCF). Since 2003, CCF has supported humanities, civic and STEM programming in libraries of all types. With help from individual and corporate donors, the fund has grown into an endowment of \$1.9 million. Starting in fall 2016, gifts to CCF were matched, one to one, by Nancy Kranich, a former ALA president and longtime generous supporter of ALA, and the resulting funds would create an endowment to support the work of community engagement in libraries. In February, PPO announced to CCF supporters that the \$50,000 goal has been surpassed, and we have reached \$60,000 in contributions. In the coming months, PPO will share more about the programs that will be supported through this new community engagement initiative.
- **Office for Library Advocacy and SAGE Publishing.** As part of its social impact and advocacy efforts, SAGE Publishing held a fundraising event at the 2019 ALA Midwinter Meeting, where a donation was made to the Office for Library Advocacy for each attendee badge scanned. A total of \$2000 was raised.
- **Library Giving Day.** The Development Office, in conjunction with PLA and United for Libraries, has been working with the Seattle Public Library Foundation to promote the first year of a new national initiative, Library Giving Day. The one-day fundraising effort is scheduled for April 10, 2019, and offers support and a fundraising toolkit for any public library that signs up to participate. ALA is promoting Library Giving Day on its main social media channels, as well as those of PLA and United for Libraries, who are also promoting it on their various listservs. The day has been added to the official National Library Week calendar and will be featured on Book Club Central's home page. Should this initiative prove successful in its first year, it will be a key step towards increased grassroots funding for public libraries nationwide.

### **Organizational Excellence**

- The Development Office continues to experience exciting transition. In February 2019, Ryan LaFollette came on board as the Assistant Director for Major Gifts. Also in March, Autumn Ni transitioned from contract employee to full-time Development Coordinator.
- In order to provide greater relationship management functionality, ALA is currently engaged in a pilot program to test the Salesforce platform for this purpose. This presents an excellent opportunity for ALA to review how key programs/platforms might integrate more effectively and efficiently.

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## ALA Fundraising Priorities

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### Annual Fund

The work to build a consistent Annual Fund campaign continues. The key components of the Annual Fund campaign are:

- Mail appeal in November
- Email campaign on Giving Tuesday in November and then the second half of December
- Supporting social media in November and December
- Email and social media mini-campaigns at other times throughout the year, including during National Library Week, at fiscal year end, and other times of visible activity for the Association.

The Annual Fund contributions form the basis of all giving from individuals.

The Annual Fund The chart below shows the pattern of individuals giving unrestricted funds to ALA over the past five fiscal years. ALA unrestricted funds are the funds that allow us to be flexible and supporting emerging activities paid out of the general fund. Unit unrestricted funds are the Friends funds that serve as flexible and responsive funds for the ALA Divisions and Roundtables.

#### Q1 + Q2 Gifts from Individual Donors, FY15 – FY19

	FY19		FY18		FY17		FY16		FY15	
	Donors	Gifts	Donors	Gifts	Donors	Gifts	Donors	Gifts	Donors	Gifts
ALA unrestricted	454	\$52,955	463	\$26,694	260	\$15,208	47	\$8,728	84	\$11,295
Unit Unrestricted	428	\$26,009	451	\$53,869	288	\$30,614	143	\$47,046	405	\$40,349
Total	882	\$78,964	914	\$80,563	548	\$45,822	190	\$55,744	489	\$51,644

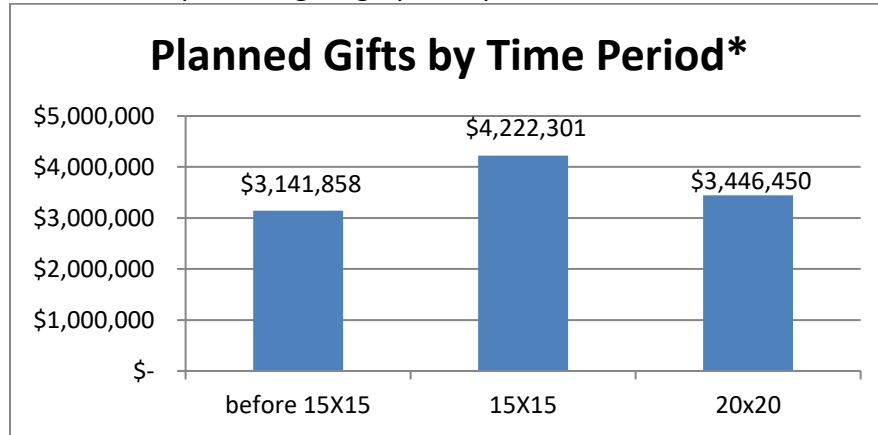
- **FY19:** there was a slight decline in giving during the first half of FY19. However, given that in FY18 we offered \$100,000 in matching funds to every person who made a gift of \$1,000 or below during November or December, we were able to retain an impressive number of donors. We also saw a 98% increase in the amount of ALA unrestricted funds that will support critical general fund activities this fiscal year.
- **FY18:** As mentioned above, many of the gains we saw in FY18 were driven by the \$100,000 in matching funds. It was also the second year the Association worked together on a coordinated fundraising campaign, so we built upon the success of the year before.
- **FY17:** The first year that we did an association-wide, Annual Fund appeal during November and December. It had a dramatic impact on the number of donors and amount of money raised.
- **FY16:** Some of this is renewal donors who gave to the ACRL 75<sup>th</sup> Anniversary. There was also a pilot association-wide coordinated Giving Tuesday campaign that had a positive impact on fundraising from individuals.
- **FY15:** the year of the ACRL 75<sup>th</sup> Anniversary, there was a tremendous increase in support for ACRL in particular.

Building a strong Annual Fund campaign is the key first piece of building a strong donor pipeline. Increased staff in the Development Office means stronger capacity to raise more funds now and in the future.

## Planned Giving

The Development Office continues to work to build a pipeline of donors who are planning to leave a legacy to ALA. In 2012, ALA began efforts to identify prospects and build a pipeline of donors who are potentially interested in supporting ALA.

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):	\$3,446,450

Additional detail about the pledges reflected above:

New Planned Giving Pledges to ALA, March 2016 – December 2018		
	Approximate Pledge Amount	New Members
<b>1876 Club</b>	\$1,294,750	14
<b>Legacy Society</b>	\$2,151,700	12
<b>Total</b>	<b>\$3,446,450</b>	<b>26</b>

### 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.

Activities to promote the Legacy Society in FY19 include:

- Legacy Society Luncheon at Annual Conference, to steward current Legacy Society members.
- Meetings at Annual Conference.
- 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.
- Planned giving mailing in spring of 2019.
- Ads in *American Libraries* promoting the Legacy Society

Activities to promote the 1876 Club in FY19 include:

- Host a gathering for 1876 Club members and prospects at Midwinter Meeting 2020.
- Spring mailing to 1876 Club prospects inviting them to contact the Development Office for more information.
- Gathering for 1876 Club members and prospects at Annual Conference 2020.
- Ongoing meetings with 1876 Club prospects.

### **Libraries Transform Campaign and Library Champions**

At Annual Conference in June 2017, the ALA Executive Board voted to officially extend Libraries Transform through 2020. In the past year, it has reached over 10,000 sign-ups, and over the next two years, Libraries Transform will continue to grow and evolve, increasing engagement with its participants by developing new tools and content tailored to different library types and areas of interest, including topics such as health literacy and family engagement. CMO and the Development Office continue to promote Libraries Transform in collaboration with internal and external partners.

The Development Office has begun a re-assessment of the Library Champions program. Areas under review include the program's tier structure, benefits, new prospects, and stewardship. In April, the Development Office plans to survey current Library Champions regarding their satisfaction with the program and will use survey results to inform changes to the program. At the same time, the Development Office has conferred with other ALA Divisions and Offices to identify additional Library Champions benefit opportunities.

The ALA Library Champions play a key role in promoting the value of libraries to the general public through the Libraries Transform Campaign. ALA is tremendously grateful to all Library Champions for their support of our public awareness efforts. Special thanks to the current 2019 Library Champions: Baker & Taylor, Bound to Stay Bound, Brodart, Candlewick Press, Capital One Services, EBSCO Information Services, Gale, a Cengage Company, INGRAM Book Company, Morningstar Inc., OCLC, ProQuest, Rakuten OverDrive Inc., Reference USA, SAGE Publications, Scholastic Inc., SirsiDynix, Sisters in Crime, Springer SBM, DEMCO, Elsevier