

TO: ALA Executive Board

RE: Development Investments Update

ACTION REQUESTED/INFORMATION/REPORT:

ACTION REQUESTED BY:

CONTACT PERSON:

Mary Ghikas, Executive Director, ALA

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DATE: March 22, 2019

In FY18, the ALA Development Office shared the results of a comprehensive assessment of fundraising activities at ALA. Based on the results of that assessment, the Development Office proposed several changes in the way we do our work and financial investments, which were approved by the ALA Executive Board and began to be implemented in FY19. The ALA Development Office investment budget supports our efforts to work towards the following concrete recommendations to improve the overall development function at ALA:

RECOMMENDATION ONE: Focus ALA's development program on the "greater good" messages and ask divisions to coordinate with development on member-focused fundraising drives throughout the year.

RECOMMENDATION TWO: Build the annual giving appeal into a consistent recurring multi-year program.

RECOMMENDATION THREE: Begin to create a major gifts culture that celebrates the power of giving.

RECOMMENDATION FOUR: Continue "friend to friend" planned giving, leveraging the reach of member networks.

RECOMMENDATION FIVE: Invest in fundraising staffing and centralized development functions to better serve units.

RECOMMENDATION SIX: Invest in upgrading and utilizing the full fundraising software functionality of iMIS.

FY19 – FY21 Investments in the ALA Development Office

In order to support our efforts to accomplish the recommendations outlined above, the following strategic financial investments in the Development Office were approved by the Executive Board in 2018:

1. Increased staff, from 3.5 to 6. As of 2/25/19, the Development Office is fully staffed, with six members. Specific capacity has been added around working with individuals at all giving levels, donor communications and stewardship, and organizational infrastructure.
2. Increased travel budget. A successful major gifts effort involves visiting donors. We hired an Assistant Director of Development working in Major Gifts, and that person is working on their travel schedule for the next 18 months.
3. Increased budget for fundraising materials, including refreshed planned giving materials and more consistent and strategic mail fundraising efforts. We successfully sent out the fall Annual Fund appeal, and are preparing a new planned giving brochure that will be sent to targeted prospects in spring 2019.
4. Participation in the Salesforce pilot project. The Development Office is working closely with the Washington Office to pilot using Salesforce to engage advocates and fundraise. We anticipate that we will be actively using the system by June.
5. Launching of the new Philanthropy Advisory Group (PAG). Lenore England and Rod Hersberger are member leaders spearheading the effort to create structure for and recruit members for the new PAG. We are in the process of circulating the application and job description and will present a recommended slate at the Finance and Audit Committee at Annual Conference, with a first meeting also to take place at Annual Conference.