

EBD #6.0
October 2021

TO: ALA Executive Board

RE: Report of the ALA Development Office

ACTION REQUESTED/INFORMATION/REPORT: Development Office report

CONTACT PERSON:

Tracie D. Hall, Executive Director, ALA

Anne Manly, Assistant Director of Corporate and Foundation Relations, amanly@ala.org

DATE: October 29, 2021

ACTION REQUESTED: None

DEVELOPMENT OFFICE FUNDRAISING REPORT TO THE EXECUTIVE BOARD BACKGROUND:

The purpose of the ALA Development Office report to 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 Development Office 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 Accomplishments

The following are highlights of ALA's Fundraising Activities, and Organizational Excellence since June 2021:

ACRL:

- Total donations:
 - Between 5/21/21 and 9/10/21 ACRL received \$22,835.10 in donations. Of that amount 91.7% (\$20,959.10) came from unused ACRL Section Basic Services funds. Each year we invite ACRL Sections to fund named ACRL Conference Scholarships for their members for the 2023 ACRL Conference with unused year-end funds.
- Number of donors (as well as new, former, continuing)
 - 54 donors gave been 5/21 and 9/10.
 - 4 were new
 - 28 were continuing
 - 6 were former donors
 - 16 donors made repeat donations
- % of donations going to Advancement, ACRL Conference Scholarships, and RBMS
 - Advancement Fund: 2.5% (\$649)
 - ACRL Conference Scholarship Fund: 91.7% (\$28,894.05)
 - RBMS Scholarship Fund: 5.6% (\$1,292.05)
- Number of sustaining donors
 - Circle of Friends (5-9 years): 135
 - Circle of Excellence (10-14 years): 36
 - Circle of Distinction (15+ years): 12
- Number of ACRL donors who belong to ALA Legacy Society donors
 - 11 Legacy Society donors

ODLOS:

- [Miriam Tuliao](#) swam Grimaldo's Mile, a one-mile open water event in New York City, on July 31 to raise funds for the Spectrum Scholarship Program. This was Tuliao's 14th consecutive year organizing an annual fundraiser for Spectrum. Her swim was in honor of Shauntee Burns-Simpson, president of the Black Caucus of the American Library Association and associate director of school outreach for The New York Public Library. As of this report, Miriam's efforts had raised \$5,059 in donations.
- IMLS Grant. ODLOS applied for and was granted \$798,489 from IMLS to support a doctorate program that continues Spectrum's work. In partnership with the University of South Carolina's School of Information Science, ODLOS will recruit a cohort of 8-10 racially and ethnically diverse doctoral students focused on advancing racial equity and social justice in library and information science (LIS) curricula. The project team will work with five LIS doctoral degree programs: Emporia State University, Syracuse University, the University of Maryland, the University of South Carolina, and the University of Washington. The grant will

develop future LIS faculty committed to fostering racial equity through teaching and research while also building capacity and cooperation amongst partnering LIS degree programs to expand social justice curricula and increase support for doctoral students and faculty in the field who are Black, Indigenous, and people of color

PLA:

- Collaborations with AT&T expand to address digital literacy, citizenship, and navigators. PLA initiated a new project in April 2021, receiving \$461,362 from AT&T to develop, deliver, promote, and scale co-branded digital literacy educational tools (including basic technical skilling, online safety, etc.). These new and revised tools will be available through PLA's [DigitalLearn](#) initiative and the new [AT&T DigitalLearn site](#) developed by PLA for AT&T's [Connected Learning](#). In August 2021, PLA amended the agreement and has received an additional \$228,657 from AT&T specifically for digital citizenship. PLA will assist in the development of content for up to five digital citizenship courses for families, integrate those courses into DigitalLearn and the new AT&T site, and promote them to libraries for programming. As of September 2021, PLA is also exploring an additional grant of up to \$500,000 for a project that would help public libraries develop digital navigators, to help communities with device acquisition, broadband adoption, digital skills for employment, digital citizenship, closing the homework gap, and more.
- PLA no-cost extension of IMLS grant for Latinx family engagement granted. In July 2020, [Institute of Museum and Library Services](#) (IMLS) awarded the [Public Library Association](#) (PLA) and the [National Center for Families Learning](#) (NCFL) a \$99,949 planning grant under the National Leadership Grants for Libraries category (LG-246412-OLS-20). In September 2021, PLA received approval for a no-cost extension to complete the work over the next 6-8 months.
- Microsoft support to PLA nears \$700,000 with most recent employee donations. Since late 2018, PLA has received \$608,251 from Microsoft and Microsoft Philanthropies, for projects which provided hotspots, laptops, and Wi-Fi access points to rural libraries, and gave select urban libraries funds and laptops to develop digital skilling programs and incentives. Over the 2020-2021 "giving" season, Microsoft encouraged its employees to donate to PLA for public library job skilling initiatives via payroll deductions and other means, using the Benevity platform. By May 2021, PLA had received all the reports and calculated that \$65,591 had been received, representing gifts from about 1,200 employee donors and Microsoft's corporate match.
- PLA receives \$55,000 as partner in computational thinking project. PLA participated in a successful application by WGBH-Boston to the National Science Foundation for a project on computational thinking. In August 2021, PLA learned that "Fostering Joint Parent/Child Engagement in Preschool Computational Thinking by Leveraging Digital Media, Mobile Technology, and Library Settings in Rural Communities (WAISL)" was funded, and PLA has executed a subcontract for \$55,000 to provide subject matter expertise and to promote computational thinking tools and resources to public libraries to integrate into programming.
- PLA 2022 Conference fundraising kicks off. Fundraising for PLA 2022 (March 23-25, 2022 in Portland, OR) has been initiated. PLA's contractor, Corcoran Expositions, will solicit contributions and sponsorships from vendors and others, with a goal of about \$100,000 in sponsorships as in previous years. Concurrently, the PLA board will undertake an individual giving campaign to raise funds from PLA leaders, members, and others to support conference scholarships.
- PLA works with the Development Office on potential funding partnerships. PLA continues to work with ALA Development to connect interested partners to ALA fundraising, most recently participating in meetings with IBM and Comcast to explore opportunities.

In addition to the above, ALA's Development Office worked closely with multiple ALA units to support of their fundraising efforts, including prospect research, prospect identification, developing engagement strategies, drafting correspondence and proposals, conducting negotiations, drafting, and reviewing agreements, and reporting.

ALA Fundraising Priorities

Fundraising: Development is continuing to work on strengthening its operational capacity and long-term sustainability. Key components of this work include campaign readiness, foundation and corporate grants, major gift cultivation, and the expansion of the association's individual donor base, as well as the discovery and leveraging of new and existing relationships and opportunities that may help to reach stated goals. PAG has provided crucial input

Planned Giving: In August, ALA's Development Office Director Tracie Hall reached an agreement with an on-line platform known as FreeWill, resulting in planned gift bequests to ALA in the amount of \$27,300, so far. FreeWill is a for-profit organization that offers free estate planning and templates to the public that enables individuals to make a legally binding will without consulting an attorney. For a fee, non-profits can be featured as a suggested bequest recipient and FreeWill will work with the non-profit to develop a landing page featuring the non-profit and other tools to direct users to give to the non-profit. After protracted negotiations, Hall was able to bring the final cost of one year subscription to \$10,000, down from an original \$26,000. In addition, Hall secured FreeWill's agreement that payments could be made in installments.

Donation Website: Through the combined efforts of Development, CMO and IT, we expect to have a one-click donation option available by Giving Tuesday. We expect this to create a much more user-friendly donation experience, with higher conversion rates and a clear call to action.

Libraries Transform Campaign - Library Champions: The Library Champions program had shown great stability throughout the pandemic. The present number of Champions is holding steady at 24, with no member loss in the past 12 months.

Philanthropy Advisory Group: The Philanthropy Advisory Group (PAG) served as co-host of ALA's Fall Stewardship Gathering with ALA President Patty Wong and ALA Executive Director Tracie Hall. The purpose of the Gathering was to celebrate ALA donors and community. Over 50 people virtually attended the event, which was marked by genuine warmth and celebration. PAG was essential in the planning and execution of the event.

Development Office, Personnel: The Development Office currently consists of Tracie Hall, Anne Manly and Remigio Torres. Early steps for the selection of a Director of Advancement and External Relations, including the selection of a search committee, are in place.

Development Office, Budget: In the past three years, ALA's Development Office's expected revenue has significantly increased to better reflect both the needs of the association and the capacity of the Development Office under Tracie Hall's leadership. In 2020, ALA's Development Office was charged with raising \$100,000 in contributed income for the year. In 2021, that amount was increased to \$2,500,000 and the Development Office's actual total contributed revenue in FY21 was \$4,650,000. In FY22, the Development Office is charged with raising \$3,085,000 in contributed income.

The Development Office finished FY21 with an ending net balance of \$1,762,379. Development's FY22 budget reflects \$503,191 in expenses compared to \$3,080,000 in revenue. In creating this FY22's budget, Development committed to not decreasing expenses to internal ALA units but instead decreased budgeted amounts to outside vendors.

ALA Overall Giving:

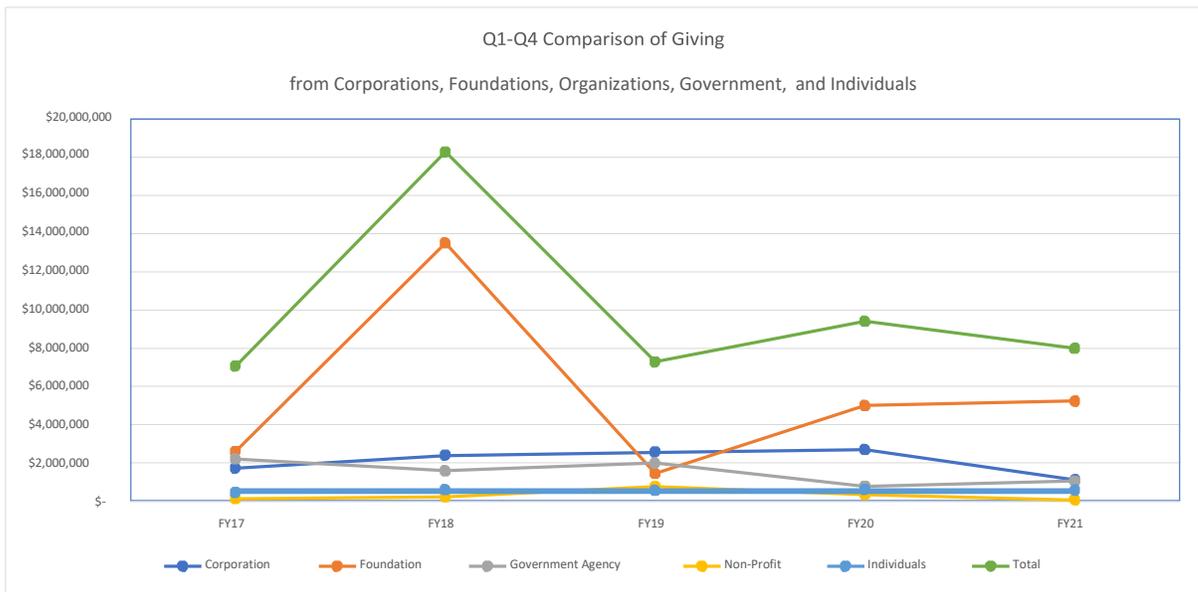
Donations and Grants, FY 2021 Q1 - Q4 - September 1, 2020 - August 31, 2021*

*Due to accounting backlog, records for July-August are not complete.

Q1-Q4 Giving from Corporations, Foundations, Organizations, Government, and Individuals, Breakdown

| Type | Number of Donors | Number of Gifts | Amount | Median | Average |
|-------------------|------------------|-----------------|---------------------|-------------|-----------------|
| Corporation | 117 | 187 | \$ 1,113,897 | \$ 600 | \$ 5,957 |
| Foundation | 23 | 77 | \$ 5,227,199 | \$ 969 | \$ 67,886 |
| Government Agency | 14 | 53 | \$ 1,027,791 | \$ 5,184 | \$ 19,392 |
| Non-Profit | 22 | 30 | \$ 55,746 | \$ 641 | \$ 1,858 |
| Individuals | 2847 | 4382 | \$ 569,525 | \$ 25 | \$ 130 |
| | 3023* | 4729 | \$ 7,994,158 | \$25 | \$ 1,690 |

*The total reflects the number of unique donors. Total number of unique donors is less than the sum of donors listed in each row because some donors contributed to more than one gift category.



Q1-Q4 Comparison of Giving from Corporations, Foundations, Organizations, Government, and Individuals

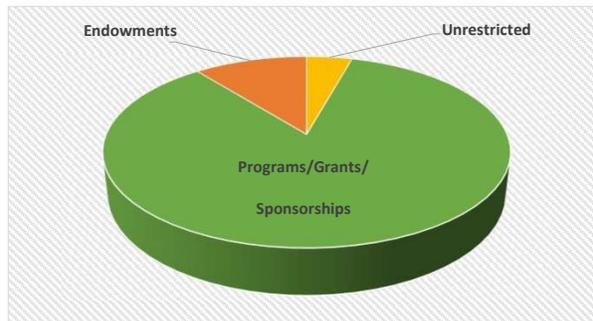
| Type | FY17 | FY18 | FY19 | FY20 | FY21 |
|-------------------|--------------|---------------|--------------|--------------|--------------|
| Corporation | \$ 1,712,841 | \$ 2,387,257 | \$ 2,565,410 | \$ 2,692,473 | \$ 1,113,897 |
| Foundation | \$ 2,587,808 | \$ 13,503,277 | \$ 1,441,422 | \$ 4,999,703 | \$ 5,227,199 |
| Government Agency | \$ 2,202,623 | \$ 1,588,195 | \$ 1,973,256 | \$ 764,663 | \$ 1,027,791 |
| Non-Profit | \$ 122,890 | \$ 218,797 | \$ 745,509 | \$ 334,114 | \$ 55,746 |
| Individuals | \$ 431,629 | \$ 583,923 | \$ 555,644 | \$ 604,084 | \$ 569,525 |
| Total | \$ 7,057,791 | \$ 18,281,449 | \$ 7,281,241 | \$ 9,395,037 | \$ 7,994,158 |

Q1-Q4 ALA and Unit Distribution

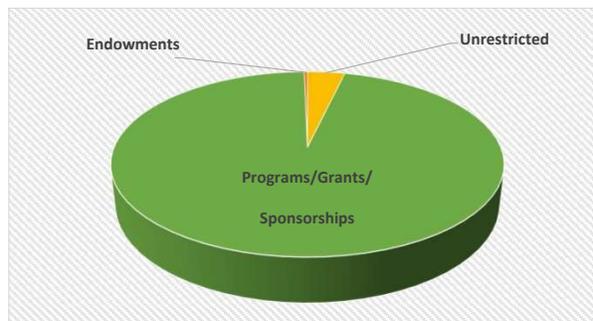
Overall Distribution: ALA and Units



Distribution for ALA: Programs, Endowments and Unrestricted

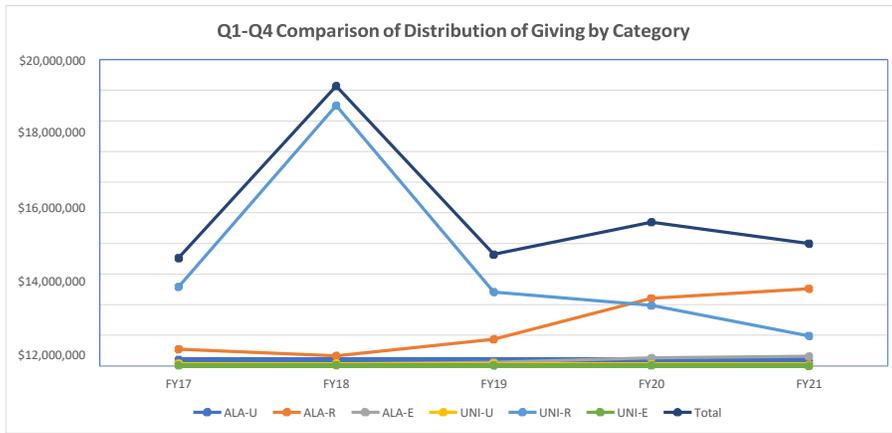


Distribution for Units: Programs, Endowments and Unrestricted



Q1-Q4 Giving from Corporations, Foundations, Government, Non-Profit, and Individuals by Category

| Type | ALA-Unrestricted | ALA-Program/Grants | ALA-Endowments | Units-Unrestricted | Units-Program/Grants | Units-Endowments | Total |
|-------------------|-------------------|---------------------|-------------------|--------------------|----------------------|------------------|---------------------|
| Corporation | \$ 6,309 | \$ 170,750 | \$ 279,977 | \$ 26,149 | \$ 630,212 | \$ 500 | \$ 1,113,897 |
| Foundation | \$ 166,272 | \$ 4,581,225 | \$ 14,693 | \$ 7,055 | \$ 457,954 | | \$ 5,227,199 |
| Government Agency | \$ 950 | \$ 285,070 | \$ 2,025 | \$ 500 | \$ 739,246 | | \$ 1,027,791 |
| Non-Profit | \$ 14,590 | \$ 1,200 | \$ 32,106 | | \$ 7,850 | | \$ 55,746 |
| Individuals | \$ 67,626 | \$ 8,343 | \$ 308,432 | \$ 41,673 | \$ 137,345 | \$ 6,106 | \$ 569,525 |
| Total | \$ 255,747 | \$ 5,046,588 | \$ 637,233 | \$ 75,377 | \$ 1,972,607 | \$ 6,606 | \$ 7,994,158 |



Q1-Q4 Comparison of Distribution of Giving by Category

| Type | FY17 | FY18 | FY19 | FY20 | FY21 |
|--------------|---------------------|----------------------|---------------------|---------------------|---------------------|
| ALA-U | \$ 420,667 | \$ 226,642 | \$ 226,897 | \$ 316,742 | \$ 255,747 |
| ALA-R | \$ 1,097,823 | \$ 666,263 | \$ 1,752,595 | \$ 4,425,143 | \$ 5,046,588 |
| ALA-E | \$ 151,865 | \$ 150,913 | \$ 248,422 | \$ 532,669 | \$ 637,233 |
| UNI-U | \$ 171,108 | \$ 172,652 | \$ 171,564 | \$ 106,994 | \$ 75,377 |
| UNI-R | \$ 5,168,054 | \$ 16,999,592 | \$ 4,837,279 | \$ 3,958,797 | \$ 1,972,607 |
| UNI-E | \$ 48,274 | \$ 65,387 | \$ 44,483 | \$ 54,691 | \$ 6,606 |
| Total | \$ 7,057,791 | \$ 18,281,449 | \$ 7,281,241 | \$ 9,395,037 | \$ 7,994,158 |