

TO: ALA Executive Board

RE: Report of the ALA Development Office

ACTION REQUESTED/INFORMATION/REPORT: Development Office report

CONTACT PERSON:

Mary Ghikas, Executive Director, ALA

Sheila O'Donnell, Director, Development Office, sodonnell@ala.org

DATE: October 25, 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

The following are highlights of ALA's Fundraising activities, Organizational Excellence, and Miscellaneous Issues since May 2019:

Fundraising

- The American Association of School Librarians received a grant of \$200,000 from the Dollar General Literacy Foundation in support of Beyond Words: The Dollar General School Library Relief Fund. The fund will provide grants to public schools whose school library program has been affected by a natural disaster. Grants are to replace or supplement books, media and/or library equipment in the school library setting.
- The Public Policy and Advocacy Office reached an agreement with an anonymous donor for additional funding to help libraries support the 2020 census. The previous agreement had called for a grant of \$75,000. The total amount of the grant has been increased to \$225,000. Library census efforts will focus on hard-to-count communities that are at a heightened risk of an undercount.
- ALA received a \$2 million grant from Google.org to develop library entrepreneurship centers. Google CEO Sundar Pichai announced the funding as part of a \$10 million pledge. This will enable ALA to fund a cohort of 10 libraries with proven models to increase the number of low-income, business creators they serve from underrepresented backgrounds. The grant will also support ALA in developing a “playbook” accessible to all libraries on what makes a successful library entrepreneurship program. The playbook will contain a set of recommendations to better serve entrepreneurs from diverse communities and common metrics to evaluate success. ALA also plans to build a peer-learning network for librarians interested in developing entrepreneurship programs of their own.
- In June, PPO received NSF notification of funding for “Collaborative Research - STAR Library Network Phase 3: Enhancing STEAM Equity and Learning Opportunities in Libraries and Their Rural Communities.” The grant amount is \$282,084 and PPO will work with long-time collaborator, the Space Science Institute.
- ACRL past president William (Bill) Miller passed away in July 2019 and his family requested that donations be made to the ACRL Conference Scholarship Fund. A special tribute was posted on the ACRL website. Nineteen donors gave more than \$1,300 in Bill’s memory. In addition, ACRL received \$15,343 from 86 donors during the period May 29 – Sept. 20, 2019.
- Lori Goetsch, dean of libraries, Kansas State University, has agreed to serve as chair the ACRL 2021 Conference Scholarship campaign.
- PLA received an out-of-cycle extension from IMLS to support a fourth cohort of the Inclusive Internship Initiative in the amount of \$313,606. This IMLS Librarians for the 21st Century grant will enable PLA to engage 50 public libraries in offering paid, mentored internships to high school students over summer 2020. Additional evaluation will be carried out to assess the program’s success and impact on previous cohorts, including past intern educational and career paths pointing toward librarianship. ALA will contribute an additional \$356,109 in matching and in-kind contributions.
- PLA was awarded a second round of funding from Community Catalyst (originally sourced from the Robert Wood Johnson Foundation), along with several other national partners, to disseminate information and resources to promote health insurance enrollment as a part of the Affordable Care Act. PLA will receive roughly \$109,000 in grant funds from Community Catalyst to conduct outreach using ALA’s national platforms, events and communication channels. PLA will share strategies and resources for libraries to promote enrollment in the Marketplace, including offering individual libraries \$500 to conduct their own outreach and educational activities. To augment efforts of libraries to teach members how to enroll online, PLA will

develop two new courses on its DigitalLearn.org site to teach about the online enrollment process, as well as develop additional resources for patrons and staff to learn more about enrolling in health insurance and to achieve better health outcomes.

- Margaret “Peggy” Barber, 75, American Library Association (ALA) associate executive director of communications from 1970–2000, passed away on August 25. In that role, she established ALA’s Public Information Office, Public Programs Office, and the ALA Graphics department, which includes the Celebrity READ poster series. Barber also worked to establish the national library symbol that now appears on street signs nationwide. She coauthored *Getting Your Grant: A How-to-Do-It Manual for Librarians* with Linda D. Crowe and received ALA’s 1999 Joseph W. Lippincott Award for distinguished service to the library profession. After leaving ALA, she was a principal consultant with Library Communication Strategies and served as copresident of Friends of Libraries USA, now known as United for Libraries. Friends have established a Peggy Barber tribute fund within ALA’s Cultural Communities Fund, which Barber was instrumental in creating to support cultural programs in libraries. To date, more than 120 individuals have contributed a total of more than \$18,000.

Organizational Excellence

- Sheila O’Donnell continues to serve as a member of the ALA Executive Director Search Committee.
- Remigio Torres and Autumn Ni of the Development Office attended the Association of Advancement Services Professionals’ (AASP) “Summit 2019” from September 9-11. AASP is a yearly conference for professionals who are responsible for entering, storing, maintaining and retrieving most of the data related to a fundraising organization’s supporters, donations and internal operations. Workshops covered best practices for data management, gift processing, and creating reports. Alice Burton, Development Office Communications Associate, attended “Development Day”, a conference presented by the Chicago Chapter of the Association of Fundraising Professionals and learned more about growing our Annual Fund through data-driven donor engagement, as well as list segmentation and targeted ask amounts.
- The Philanthropy Advisory Group will meet in Chicago on November 19 and 20 to tackle a full agenda including how PAG can better inform, engage and encourage philanthropy among our member colleagues; actionable projects for the coming fiscal year and in future; strategies for increased engagement of 1876 Club, Annual Fund, and Legacy Society members and prospects; and helping to build develop a culture of philanthropy within the ALA divisions and sections.
- In September, Assistant Director of Development, Major Gifts, Ryan LaFollette, resigned his position with ALA to return to his previous employer. ALA’s Development Office has re-posted the position and we hope to fill the position by December 2019.

Salesforce and BARC Investment Metrics

- The Development Office continues to work with ALA’s IT Office on the Salesforce on-boarding process. Remigio Torres and Autumn Ni are Development’s primary contacts to ensure fundraising data integrity as a part of this process. Development aims 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. Development is optimistic that Salesforce will improve data tracking and will support efforts to raise more funds for ALA overall. Salesforce has already helped identify problems within the iMIS system and the Development Office and IT continue to work to resolve those issues. Development meets weekly with IT to receive training and work through issues as they arise.

- The Development Office is investigating how to utilize Salesforce to quantify the investment metrics currently under consideration by BARC. At this time, BARC is considering a Strategic Framework which will use the following metrics to assess the Development Office’s progress and success:
 - *A decade or more of year-over-year totals of donors and dollars raised*
 - *A decade or more of year-over-year totals of major and planned gifts*
 - *Board participation rates (percentage of elected board members across the association who donate to ALA each year)*
 - *Donor response to “Where is ALA within your charitable priorities (annual membership survey)”*
 - *Narrative explanation of cultivation plan, including visits and efforts*

The Development Office is exploring Salesforce and working to determine if the metrics outlined are appropriate or if we will propose alternatives that match easily accessible reports from Salesforce.

To that end, the Development Office is currently working with ALA’s IT Office to establish procedures that will harness Salesforce’s ability to gather and organize data that will illuminate the BARC-identified metrics. Unfortunately, this effort has been slowed by issues related to iMIS data, including excessive duplicate records and other structural issues which were uncovered as a part of this project. The great news is that the transition to Salesforce has allowed us to visualize and understand certain kinds of data limitations we are facing. Given these challenges, it will likely be a staged process for us to address these metrics. We are meeting weekly with IT to address these questions and will have more information, along with some preliminary reports, at the next Board meeting.

ALA Fundraising Priorities

Banned Books Week Fund and the Annual Fund

The Development Office launched its first online mini-campaign in connection with Banned Books Week in September of 2019. This new campaign replaces the Fiscal Year-End campaign. We look forward to growing the Banned Books Week Fund as an exciting and relevant way to engage our members.

We have also begun preparing for our Annual Fund, which will take place in November/December 2019. The Development Office invited staff from around the Association to learn about plans for this year’s Annual Giving campaign. ALA staff were asked to help the Development Office identify Influencers and participate in the Giving Tuesday working group.

Planned Giving

The Development Office rolled out a new planned giving brochure at Annual Conference 2019. This refreshed document uses Libraries Transform branding to encourage planned gifts. We did a mailing to prospects in summer 2019 and will incorporate ongoing marketing efforts to encourage planned gifts.

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.

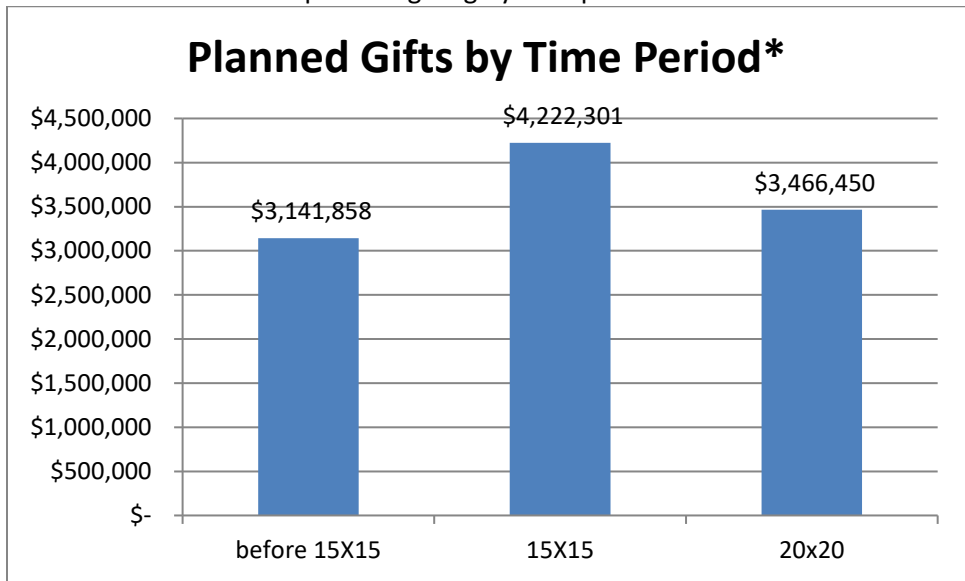
Planned Giving Activities in FY19 – FY20 include:

- Undertake assessment of the impact of the 2019 planned giving mailing and any spike in planned giving donors or contacts to the Development Office.
- Present Legacy Society Luncheon at Annual Conference 2020 to steward current Legacy Society members and 1876 Club Cocktail hour at the 2020 Midwinter Meeting.
- Revamp the 1876 Club reception at Annual 2020 into a sneak peek happy hour at the new ALA Library/Office and/or a space/meet and greet with the new Executive Director.
- Identify prospects to approach for major and planned gifts.
- Create solicitation documents to be used during donor meetings.
- Place ads in *American Libraries* promoting the Legacy Society and 1876 Club.
- Onboard new Assistant Director of Major Gifts to assist with the planned giving pipeline and stewardship.

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.

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):	\$3,466,450

Additional detail about the pledges reflected above:

New Planned Giving Pledges to ALA, March 2016 – September 2019		
	Approximate Pledge Amount	New Members
1876 Club	\$1,804,750	17
Legacy Society	\$1,661,700	15
Total	\$3,466,450	32

Libraries Transform Campaign - Library Champions

The Development Office continues to investigate low or no-cost benefits which may be offered in addition to Library Champions as part of a re-structuring of the program. Development has met with several ALA Units including Membership, National Network of Advocates, International Relations, Accreditation Office, ALA Editions, American Library, Roundtables, eLearning, Booklist, ODLOS, CMO and Conference Services to identify potential benefits. In addition, Development is working with Membership, CMO and Member Relations to develop a newsletter, webpage and Connect channel to enhance communication between ALA, Library Champions and ALA corporate members. We are working to build a pipeline of corporate members who we can encourage to move up and become Library Champions.

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 and Dollar General are Library Champions at the Sustainer Level.
- FINRA and SAGE remain Investors at the \$10,000 and above level.
- The Nora Roberts Foundations increased its giving level to \$10,000.
- Bound to Stay Bound is a Patron 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 Library Champion Members.