

**TO:** ALA Executive Board

**RE:** Development Office Fundraising Report to the Executive Board

**ACTION REQUESTED/INFORMATION/REPORT:**

Development Office Fundraising Report to the Executive Board

**CONTACT PERSON:**

Tracie D. Hall, Executive Director, ALA

Anne Manly, Assistant Director of Corporate and Foundation Relations, [amanly@ala.org](mailto:amanly@ala.org)

**DATE:** June 19, 2020

## 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 April 2020:

#### *Fundraising*

##### **Association of College and Research Libraries (ACRL)**

More than 164 individuals have donated a combined \$4,076 to the ACRL Advancement Fund in response to an appeal connected with the ACRL Together Wherever virtual event. Twenty-six current and former ACRL Board members donated \$5,052 to fund ACRL 2021 Conference scholarships in honor of Mary Ellen K. Davis.

##### **Association of Specialized and Cooperative Library Agencies (ASGCLA)**

ASGCLA's planned fundraising trip to Scotland and Northern Ireland for May has now been cancelled due to the impact and concerns arising from COVID-19.

##### **Chapter Relations Office (CRO)**

CRO has received two \$15,000 Disaster Abatement Project Awards from the National Network of the Libraries of Medicine- Southeastern Atlantic Region to provide computers and related technology and health information training to public and community libraries in the U.S. Virgin Islands and Puerto Rico still recovering from the hurricanes of 2017 and earthquakes in Puerto Rico earlier this year. This is the second set of grants received for these rebuilding efforts.

##### **Office of Diversity, Literacy, and Outreach Services**

Since the start of the fiscal year on September 1, 2019 the Spectrum Scholarship Program has raised \$39,766 in donations from 376 donors.

Launched on March 12, 2020 and extended through April 16, 2020, the Spectrum merchandise fundraiser aimed to engage Scholars and Spectrum supporters in donating to the program while also increasing promotional reach with branded apparel. \$2,000 was raised from over 80 donors.

Long-time Spectrum supporter Miriam Tuliao has pledged to run 125 miles in the month of June to honor the New York Public Library's 125th anniversary and 125 NYPL staffers, raising funds for the Spectrum Scholarship Program through a GoFundMe Charity Campaign. As of this report, Miriam's campaign has raised almost \$6,000 from 75 donors.

In conjunction with the June announcement of the 2020-2021 Spectrum Scholarship recipient: ProQuest has committed for the next three years to continuing its sponsorship of 8 Spectrum Scholars annually; the Northern California and Nevada Medical Library Group has renewed its commitment to sponsor one

scholar annually interested in health sciences librarianship; and new this year, the Library Instruction Round Table has committed for the next three years to sponsoring one Spectrum Scholar annually.

### **Public Library Association (PLA)**

In 2019, [Microsoft Philanthropies](#) granted \$384,416 to PLA for the [DigitalLead: Rural Libraries Creating New Possibilities](#) partnership, through which 41 libraries serving rural communities received 158 hotspot devices, to initiate lending programs, and 156 computers, to conduct digital literacy training sessions. The initiative was put on hold when libraries closed due to COVID-19. In response to the pandemic, PLA and Microsoft quickly created a new opportunity to provide WiFi access points to rural libraries to extend their library signals into public spaces. Microsoft granted an additional \$120,000 to PLA in May 2020 to extend the program. By June 1, 2020, over 200 libraries had completed the application, and PLA was in the process of sending out the first 75 devices along with funding for installation and promotion.

PLA receives additional funding for health insurance enrollment. [Community Catalyst](#), with funds from the [Robert Wood Johnson Foundation](#), confirmed their intent to provide PLA with additional funding for [Promoting Healthy Communities: Libraries Connecting You to Coverage](#). Community Catalyst will provide a third cycle of funding to promote enrollment in the [Affordable Care Act](#) (\$108,000) and new funding to promote enrollment in [Medicaid](#) (\$150,000). Both projects will run July 2020 through June 2021. Activities will include national promotion of tools and training to help all public libraries encourage health insurance enrollment and health literacy, along with targeted funds to help libraries conduct enrollment events, establish local partnerships, and become certified enrollment counselors.

IMLS approved PLA request to postpone the fourth cohort of the [Inclusive Internship Initiative](#) (IMLS grant RE-00-17-0129-17) to 2021. Through this IMLS Librarians for the 21<sup>st</sup> Century grant, PLA will engage 50 public libraries in offering paid, mentored internships to high school students over summer 2021. IMLS awarded PLA \$313,606, to which PLA will contribute an additional \$356,109 in matching and in-kind contributions.

### **Public Programming Office**

The National Endowment for the Humanities (NEH) has awarded the American Library Association (ALA) \$300,000 in emergency relief funds to support humanities projects, including the creation of humanities content and resources for library workers in the face of the COVID-19 global pandemic. The funding, awarded through the NEH Coronavirus Aid, Relief, and Economic Security (CARES) Act, will support the development of professional development materials to help libraries present virtual and socially distanced programming for their communities.

### *Development Office Activities and Organizational Excellence*

- ALA Executive Director Tracie D. Hall continues to serve as the Director of the Development Office. In that capacity, Tracie and Development have met with several past, current and potential funders. These meetings are in the relationship-building stage.
- The Development Office has been working with AASL since early winter to reach an agreement with Pokemon for program support. The parties have signed a Non-Disclosure Agreement and remaining details are being worked out.

- The Development Office worked closely with PPO to secure Acton Family Giving support renewal. Acton has announced its intent to provide ALA an unrestricted gift to the General Fund of \$150,000, doubling its last contribution.
- The Development Office worked closely with the Office of Intellectual Freedom to secure a Law Fellow or intern for the coming fall. Conversations with several major Universities continue and we remain optimistic.
- The Development Office worked with Tracie Hall and Conference Services to secure \$110,000 in corporate sponsor support for ALA's virtual conference. The amount raised was sufficient to allow ALA to reduce conference registration to \$60 and to allow librarians, library workers and members who have been furloughed, laid-off or have reduced hours to attend the conference free of charge.
- Tracie Hall and the Development Office conducted several conversations with FreeWill. Freewill is a social venture that provides non-profits with fundraising tools in the areas of (1) Planned Giving, (2) Qualified Charitable Distributions and (3) Stocks, Mutual Funds and Bonds. They claim to "build technology to make the most impactful gifts easier for supporters to give and simpler for organizations to receive." Conversations are on-going and Executive Director Hall has directed the Development Office to get input from ALA's Endowment Trustees and others.
- The Development Office participated in ALA's COVID-19 Recovery Initiative group.
- In March, the Development Office and the Philanthropy Advisory Group (PAG) officers presented during ALA's New Executive Board Member orientation the importance of developing a Culture of Philanthropy within the Association. PAG met once in May and again in June. Executive Director Hall serves as a non-voting PAG member and the Development Office Staff provide PAG support.
- Development, CMO and Membership are involved in on-going discussions with OverDrive to renew OverDrive's support for the coming year. Talks are going well and a final agreement is expected soon.
- The Development Office assisted AASL in drafting and submitting the Beyond Words Grant Application renewal and Final Report to Dollar General.
- Development submitted an application to Carnegie Corporation, by invitation, for support of the I Love My Librarian Award. Carnegie has signaled its intention to provide \$120,000 in support over the next two years for the award. Development continues to play a supporting role as Booklist and RUSA plan the Carnegie Medals for Excellence in Fiction and Non-Fiction ceremony.
- The Development Office's Assistant Director of Major Gifts, Genevieve Hix provided Foundation Directory On-Line training to PPO and PLA staff members. Future trainings are planned.
- The Development Office met with Finance to discuss gift-processing challenges arising from the switch to EXL.

- The Development has participated as a member of ALA’s Presidential Tour planning team.
- Development’s Communications Associate, Alice Burton, initiated a stewardship plan to increase donor retention. The Development Office did not have a codified plan for current donors and this plan will help both retain donors and increase donation size. We have also begun researching options for a public-facing donation site, with incoming donations being directed towards ALA’s unrestricted fund. We hope to have this in place by the start of FY21.
- The Development Office worked with the IT Department to revise the Donation page on ALA’s website to allow donations from Donor Advised Funds.
- Development served as primary author of a grant application to IMLS under the CARES Act. Development is grateful for input from PPO, OCR, ACRL, PLA, Finance, the Center for the Future of Libraries, PPA and Tracie Hall. Awards have not yet been announced at this time.
- The Development Office secured a \$10,000 donation to the general fund from an individual donor who has previously made major gifts to ALA.
- Development worked with the Scholarship office to finalize a scholarship agreement, in honor of Julia J. Brody, to support students focused on public librarianship.

### *Salesforce*

Development met with PPA’s Emily Wagner and Kathi Kromer prior to Ms. Wagner’s departure from ALA to pursue other opportunities.

### *BARC Investment Metrics*

The Development Office has begun using Salesforce to quantify the investment metrics currently under consideration by BARC. 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. As such, the Office previously reported that this would be likely be a staged process as we work to gather data and perform analysis.

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## **ALA Fundraising Priorities**

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### **Planned Giving**

Development continued to build the Legacy Society/1876 Club through conversations with two prospective planned givers, including the first planned gift *in memory of* another individual.

### **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.

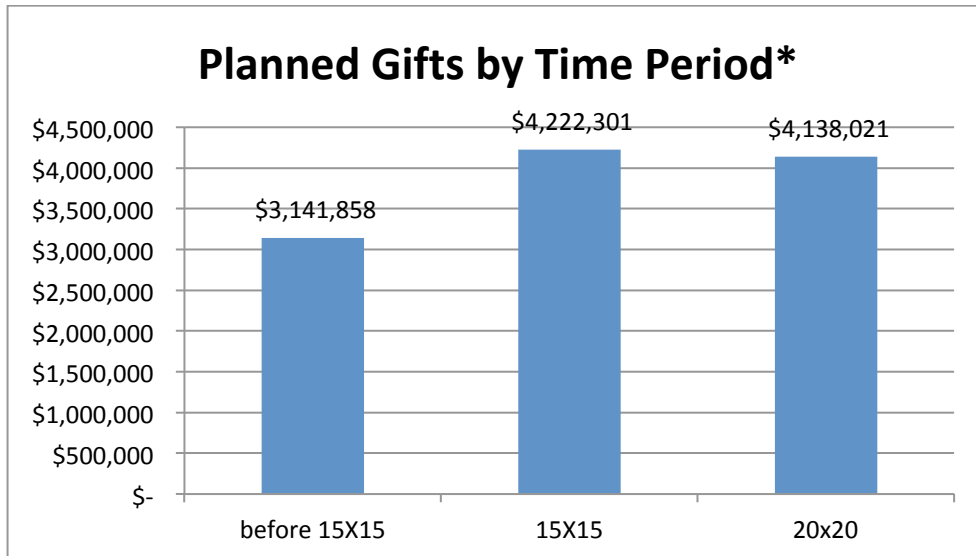
Planned Giving Activities in FY20 – FY21 include:

- Codify processes regarding bequests and scholarship funds, in collaboration with the Scholarship and Finance offices and in consultation with our attorney.
- Host a “Virtual Happy Hour” for Legacy Society/1876 Club members during Virtual Annual.
- An assessment of the impact of the 2019 planned giving mailing and any spike in planned giving donors or contacts to the Development Office.
- 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.

**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 over \$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): \$4,138,021.48

Additional detail about the pledges reflected above:

New Planned Giving Pledges to ALA, March 2016 – March 2020		
	Approximate Pledge Amount	New Members
<b>1876 Club</b>	\$1,346,321.48	20
<b>Legacy Society</b>	\$2,791,700	17
<b>Total</b>	<b>\$4,138,021.48</b>	<b>37</b>

### **Libraries Transform Campaign - Library Champions**

During 2019-2020, the Development Office evaluated and revitalized the Library Champions program. Input from the Champions, as well as from a number of ALA Units, guided Development efforts. Feedback from the Champions indicates that they are pleased with new visibility and sponsorship opportunities, ALA communication, and use of ALA social media.

With cancellation of the in-person Annual Conference, many of the Library Champion benefits were no longer available, especially those benefits relating to exhibit space and conference visibility. Development is grateful to Conference Services for their work in identifying substitute benefits, which for the most part appear to satisfy the Champions.

The Library Champions program had shown great stability through February of this year, with renewals keeping pace. However, since the pandemic, five Champions that are up for renewal have not yet renewed. Development has reached out and hopes to reach resolution. However, we anticipate that some Library Champion memberships may fall victim to the pandemic.

**Donations and Grants, FY 2020 Q1+Q2+Q3 - September 1, 2019 - May 31, 2020**

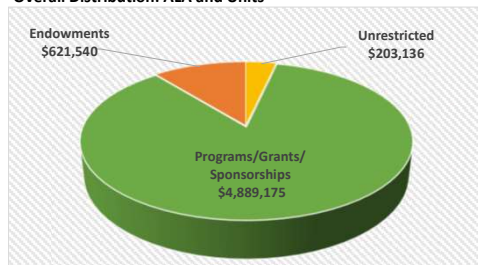
**Individuals**

Type	Number of Donors	Number of Gifts	Amount	Median	Average
ALA Unrestricted	564	703	\$ 41,508	\$ 25	\$ 59
ALA Programs/Grant/Sponsorships	179	218	\$ 12,366	\$ 25	\$ 57
ALA Endowment	512	715	\$ 220,211	\$ 35	\$ 308
Unit Unrestricted	412	567	\$ 80,236	\$ 25	\$ 142
Unit Programs/Grants/Sponsorships	297	551	\$ 188,391	\$ 35	\$ 342
Unit Endowment	78	91	\$ 9,712	\$ 25	\$ 107
	<b>1704</b>	<b>2845</b>	<b>\$ 552,424</b>	<b>\$25</b>	<b>\$ 194</b>

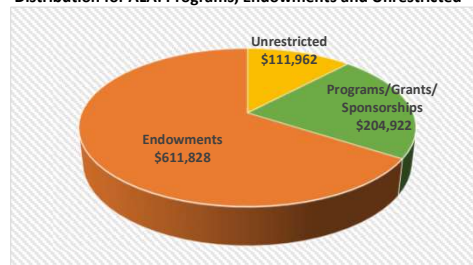
**Giving from Corporations, Foundations, Organizations and Government**

Type	Number of Donors	Number of Gifts	Amount	Median	Average
ALA Unrestricted	23	47	\$ 70,454	\$ 210	\$ 1,499
ALA Programs/Grant/Sponsorships	24	35	\$ 192,556	\$ 4,000	\$ 5,502
ALA Endowment	10	11	\$ 391,617	\$ 4,148	\$ 35,602
Unit Unrestricted	15	24	\$ 10,938	\$ 150	\$ 456
Unit Programs/Grants/Sponsorships	109	137	\$ 4,495,862	\$ 2,061	\$ 32,817
Unit Endowment	1	1	\$ 1,000	\$ 1,000	\$ 1,000
	<b>165</b>	<b>255</b>	<b>\$ 5,162,427</b>	<b>\$ 1,500</b>	<b>\$ 20,245</b>

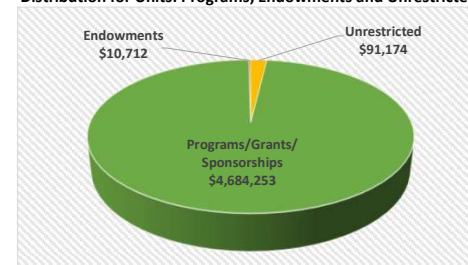
**Overall Distribution: ALA and Units**



**Distribution for ALA: Programs, Endowments and Unrestricted**



**Distribution for Units: Programs, Endowments and Unrestricted**



**FY20 Q1+Q2+Q3 Giving from Corporations, Foundations, Organizations and Government, Breakdown**

Q1+Q2+Q3	ALA- Unrestricted	ALA- Program/Grants	ALA-Endowments	Units- Unrestricted	Units- Program/Grants	Units- Endowments	Total
Corporation	\$ 30,115	\$ 72,600	\$ 304,081	\$ 7,323	\$ 704,576	\$ 1,000	\$ 1,119,695
Foundation	\$ 33,860	\$ 63,700	\$ 67,886	\$ 2,630	\$ 3,456,800	-	\$ 3,624,876
Government Agency	-	\$ 47,101	-	\$ 500	\$ 88,393	-	\$ 135,994
Non-Profit	\$ 6,478	\$ 9,155	\$ 19,650	\$ 485	\$ 246,093	-	\$ 281,861
Individual	\$ 41,508	\$ 12,366	\$ 220,211	\$ 80,236	\$ 188,391	\$ 9,712	\$ 552,424
<b>Total</b>	<b>\$ 111,962</b>	<b>\$ 204,922</b>	<b>\$ 611,828</b>	<b>\$ 91,174</b>	<b>\$ 4,684,253</b>	<b>\$ 10,712</b>	<b>\$ 5,714,851</b>

**FY 2019 Q1 + Q2 + Q3**

**Individuals**

Type	Number of Donors	Number of Gifts	Amount	Median	Average
ALA Unrestricted	574	638	\$ 58,310	\$ 25	\$ 91
ALA Programs/etc.	230	273	\$ 12,658	\$ 30	\$ 46
ALA Endowment	562	692	\$ 71,037	\$ 35	\$ 103
Unit Unrestricted	445	579	\$ 45,559	\$ 25	\$ 79
Unit Programs/etc.	387	489	\$ 285,278	\$ 50	\$ 583
Unit Endowment	116	131	\$ 6,658	\$ 25	\$ 51
	<b>1876</b>	<b>2802</b>	<b>\$479,500</b>	<b>\$25</b>	<b>\$171</b>

**Giving from Corporations, Foundations, Organizations and Govt.**

Type	Number of Donors	Number of Gifts	Amount	Median	Average
ALA Unrestricted	21	54	\$ 151,887	\$ 210	\$ 2,813
ALA Programs/etc.	38	55	\$ 1,554,549	\$ 4,000	\$ 28,265
ALA Endowment	16	30	\$ 136,544	\$ 500	\$ 4,551
Unit Unrestricted	23	37	\$ 59,298	\$ 400	\$ 1,603
Unit Programs/etc.	188	253	\$ 3,338,523	\$ 1,250	\$ 13,196
Unit Endowment	7	8	\$ 33,767	\$ 1,000	\$ 4,221
	<b>254</b>	<b>437</b>	<b>\$ 5,274,568</b>	<b>\$ 1,000</b>	<b>\$12,070</b>

**FY2019 Q1-Q4**

**Individuals**

Type	Number of Donors	Number of Gifts	Amount	Median	Average
ALA Unrestricted	671	755	\$ 62,169	\$ 25	\$ 82
ALA Programs	252	295	\$ 14,526	\$ 30	\$ 48
ALA Endowment	650	875	\$ 90,846	\$ 50	\$ 104
Unit Unrestricted	542	695	\$ 80,581	\$ 25	\$ 115
Unit Program	440	561	\$ 299,806	\$ 50	\$ 528
Unit Endowment	140	159	\$ 7,716	\$ 25	\$ 48
	<b>2186</b>	<b>4125</b>	<b>\$ 555,644</b>	<b>\$ 25</b>	<b>\$ 3,495</b>

**Giving from Corporations, Foundations, Organizations and Govt.**

Type	Number of Donors	Number of Gifts	Amount	Median	Average
ALA Unrestricted	20	63	\$ 164,728	\$ 200	\$ 2,615
ALA Programs	52	72	\$ 1,738,069	\$ 4,000	\$ 23,809
ALA Endowment	18	34	\$ 157,576	\$ 500	\$ 4,635
Unit Unrestricted	41	61	\$ 90,983	\$ 400	\$ 1,467
Unit Program	218	313	\$ 4,537,474	\$ 1,500	\$ 14,451
Unit Endowment	8	9	\$ 36,767	\$ 1,000	\$ 4,085
	<b>311</b>	<b>606</b>	<b>\$ 6,725,597</b>	<b>\$ 1,000</b>	<b>\$ 11,098</b>