

**TO:** ALA Executive Board

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

**ACTION REQUESTED/INFORMATION/REPORT:** Development Office report

**ACTION REQUESTED BY:**

Sheila O'Donnell, Development Director

**CONTACT PERSON:**

Mary Ghikas, Executive Director, ALA

Sheila O'Donnell, Director, Development Office, [sodonnell@ala.org](mailto:sodonnell@ala.org)

**DATE:** March 28, 2018

**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

---

Following the list of accomplishments, further information about specific fundraising activities is listed to highlight the expanding role and reach of ALA. When appropriate, hyperlinks have been included to provide additional information.

### *Strategic Priorities*

- YALSA submitted a proposal to IMLS for a grant of \$442,500 to support *Leveraging Computer Science to Build Connected Teen Services: Best Practice, Knowledge & Skills*. This project will train 10,000+ library staff across all 50 states in best practices in library services for/with teens. The project will use the lens of facilitating computer science (CS) and computational thinking (CT) activities to prepare teens for personal and professional success, and be implemented by YALSA in partnership with COSLA.

### *Fundraising*

- PLA and its contractor, Corcoran, have confirmed \$97,000 sponsorships (plus additional in-kind support) from 33 unique companies for the PLA 2018 Conference, March 20-24, 2018 in Philadelphia, PA.
- PLA received \$312,000 in supplemental funding from IMLS to extend the Inclusive Internship Initiative through 2018 (grant RE-00-17-0129-17). These funds will support 50 paid internships for high school students in public libraries this summer.
- In February 2018, PLA submitted the phase 1 milestone reports on its \$10,805,701 legacy grant from the Global Libraries program of the Bill & Melinda Gates Foundation. Upon approval, BMGF will issue PLA the remaining \$9,123,241 towards the grant award, which runs through May 31, 2026.
- PLA initiated a new individual giving effort in 2018, to expand the organization's donor base of members and other friends. PLA is recruiting founding donors from past presidents, board members and staff in anticipation of launching a wider appeal in conjunction with the ALA Annual Conference in June 2018. A small group of member leaders and friends are overseeing the effort, led by PLA past president Clara Bohrer. As of March 14, 2018, PLA had raised a total of \$17,092 from 65 individuals in fiscal year 2018 (compared to under \$1,000 raised from about 25 individuals in fiscal year 2017).

### *Organizational Excellence*

- The Development Office engaged a prospect research consultant to work on a pilot project creating donor profiles and prospect lists, through August of 2018. The consultant project is being co-funded by AASL, ACRL, PLA and ALA.
- The ALA Development Office continues to work with ITTS to ensure the functionality of the online donations site.
- Development Office staff are well represented in the upcoming Communications Study and Membership Study. Sheila O'Donnell is participating in the Communications Study and Jeffrey Roth is participating in the Membership Study.
- The Development Office is experiencing some staff transition and growth, in part due to the recommendations from the Development Audit. We are using this period of change to review the structure of the Development Office Report to the Executive Board, and anticipate rolling out changes starting with this report and continuing through the Fall Board meeting of 2018.

---

## ALA Fundraising Priorities

---

### Annual Fund

In fall of 2017, the Development Office launched our second ever Association-wide Annual Fund campaign to benefit ALA overall. The campaign had three components:

1. A matching gift! We received a pledge for matching funds for gifts of up to \$1,000 from an individual donor, up to \$10,000 per ALA unit, and a max of \$100,000 overall. The match generated tremendous excitement and drove very strong returns.
2. Mail appeal. A paper letter with a reply envelope and an insert describing ALA advocacy and public awareness efforts was sent to 54,000 members in November.
3. Reminder postcard was sent to 9,000 of the strongest prospects in December.
4. E-mail campaign. In total, we sent five emails in November and six in December.

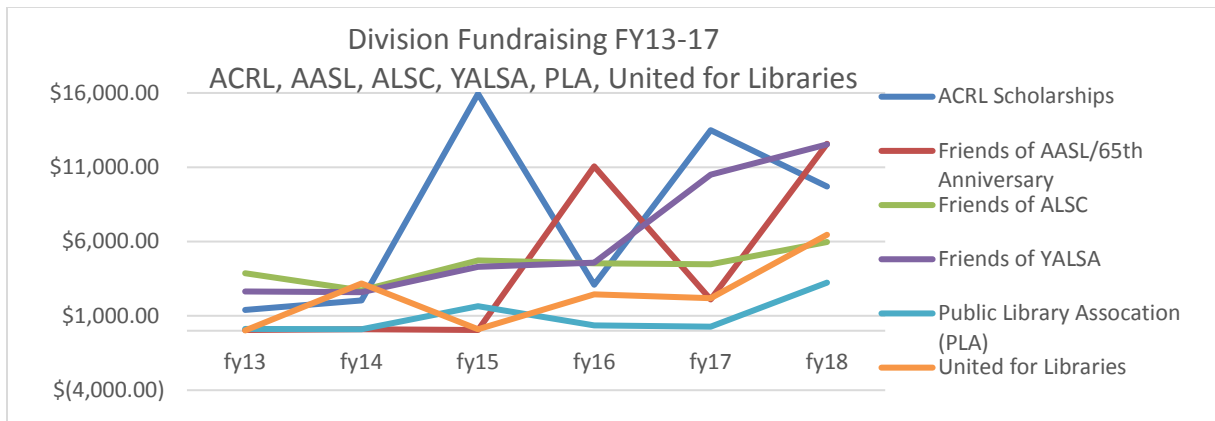
The Annual Fund campaign was a strong success. We are delighted to report that we had the following results, September 1 – December 31, 2017:

Giving by Individuals during Q1+Dec												
	FY13		FY14		FY15		FY16		FY17		FY18	
Donors	Amount	#	Amount	#	Amount	#	Amount	#	Amount	#	Amount	#
Under \$1,000	\$37,447	436	\$43,334	483	\$62,804	637	\$60,136	463	\$88,145	735	\$152,166	1,484
Over \$1,001	\$10,397	6	\$7,500	2	\$59,665	12	\$617,925	7	\$14,224	7	\$228,747	12
Total	\$47,844	442	\$50,834	485	\$122,469	649	\$678,061	470	\$ 102,369	740	\$380,913	1,496

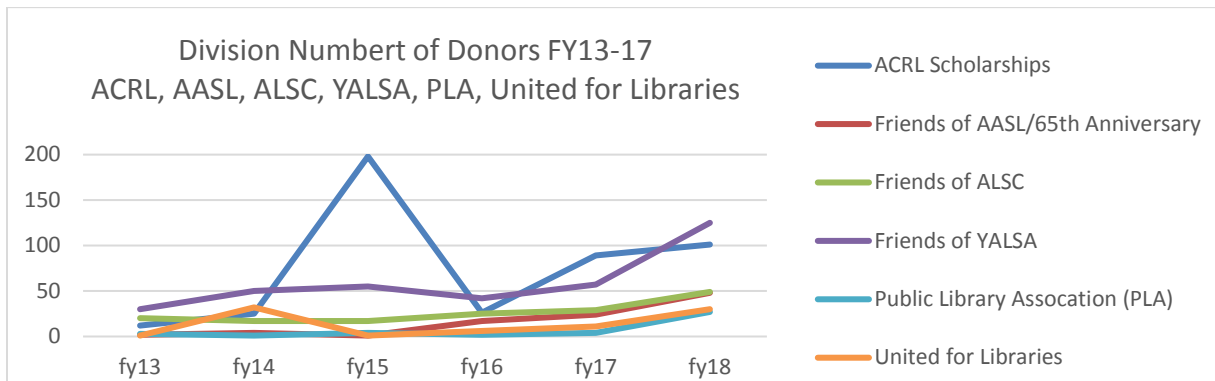
We are pleased to report the following successes of the Annual Fund campaign last fall:

- A record number of donors participated – twice as many as FY17, and several times above the next strongest year, FY15, which is when ACRL was receiving scholarship support for their 75<sup>th</sup> Anniversary year.
- The match generated tremendous excitement amongst donors and prospects. We had our strongest Giving Tuesday and December fundraising ever.

**Results by Division:** We started by pulling the top funds from each Division. We then looked at the Divisions in two parts, grouping the Divisions primarily by size of their membership. It's important to note that the charts below don't show the total fundraising for each Division, as there may be small funds within each Division that are not included. What it shows is the general fundraising trend for ALA units, giving an overall sense of the strength of the campaign in terms of growing the number of donors and the amount of money raised across ALA overall.

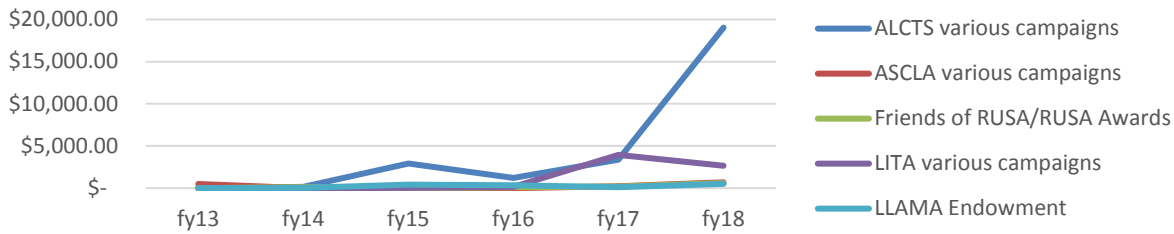


\$ fundraised	fy13	fy14	fy15	fy16	fy17	fy18
ACRL Scholarships	\$ 1,400	\$ 2,030	\$ 15,942	\$ 3,094	\$ 13,495	\$ 9,715
Friends of AASL/65th Anniversary	\$ 50	\$ 107	\$ 50	\$ 11,065	\$ 2,097	\$ 12,580
Friends of ALSC	\$ 3,880	\$ 2,710	\$ 4,730	\$ 4,538	\$ 4,473	\$ 5,970
Friends of YALSA	\$ 2,640	\$ 2,595	\$ 4,299	\$ 4,581	\$ 10,511	\$ 12,537
Public Library Association (PLA)	\$ 115	\$ 100	\$ 1,650	\$ 350	\$ 280	\$ 3,236
United for Libraries	\$ 20	\$ 3,170	\$ 100	\$ 2,450	\$ 2,200	\$ 6,458



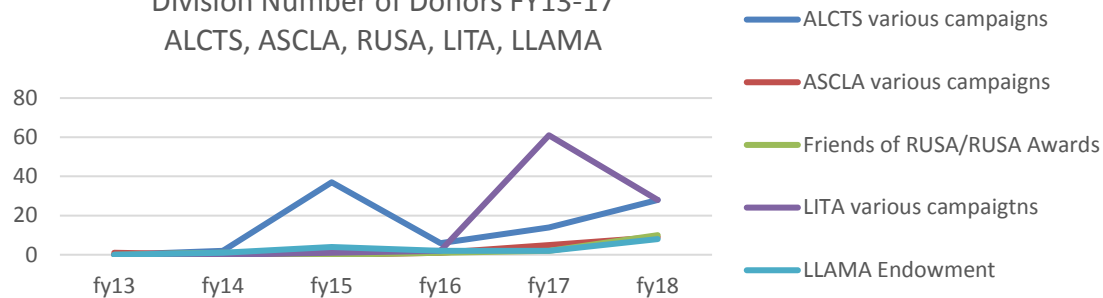
number of donors	fy13	fy14	fy15	fy16	fy17	fy18
ACRL Scholarships	12	25	198	26	89	101
Friends of AASL/65th Anniversary	2	4	1	17	24	48
Friends of ALSC	20	17	17	25	29	49
Friends of YALSA	30	50	55	42	57	125
Public Library Association (PLA)	3	1	4	2	4	27
United for Libraries	1	32	1	6	11	30

Division Fundraising FY13-17  
ALCTS, ASCLA, RUSA, LITA, LLAMA



\$ fundraised	fy13	fy14	fy15	fy16	fy17	fy18
ALCTS various campaigns	\$ -	\$ 150	\$ 2,925	\$ 1,215	\$ 3,385	\$ 19,035
ASCLA various campaigns	\$ 500	\$ -	\$ -	\$ 10	\$ 225	\$ 690
Friends of RUSA/RUSA Awards	\$ -	\$ 100	\$ -	\$ 100	\$ 200	\$ 600
LITA various campaigns	\$ -	\$ -	\$ 30	\$ 135	\$ 3,940	\$ 2,670
LLAMA Endowment	\$ -	\$ 50	\$ 425	\$ 350	\$ 100	\$ 506

Division Number of Donors FY13-17  
ALCTS, ASCLA, RUSA, LITA, LLAMA



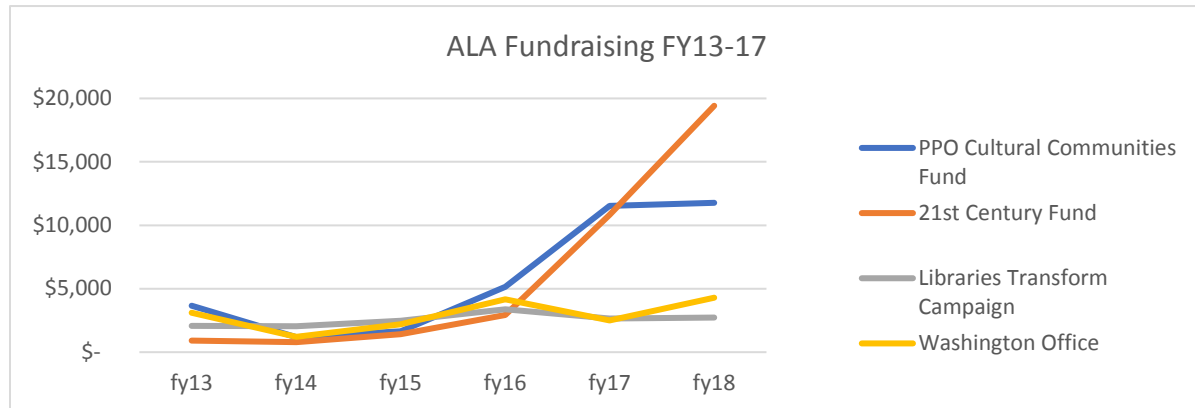
number of donors	fy13	fy14	fy15	fy16	fy17	fy18
ALCTS various campaigns	0	2	37	6	14	28
ASCLA various campaigns	1	0	0	1	5	9
Friends of RUSA/RUSA Awards	0	1	0	1	2	10
LITA various campaignts	0	0	1	2	61	28
LLAMA Endowment	0	1	4	2	2	8

**Conclusions:**

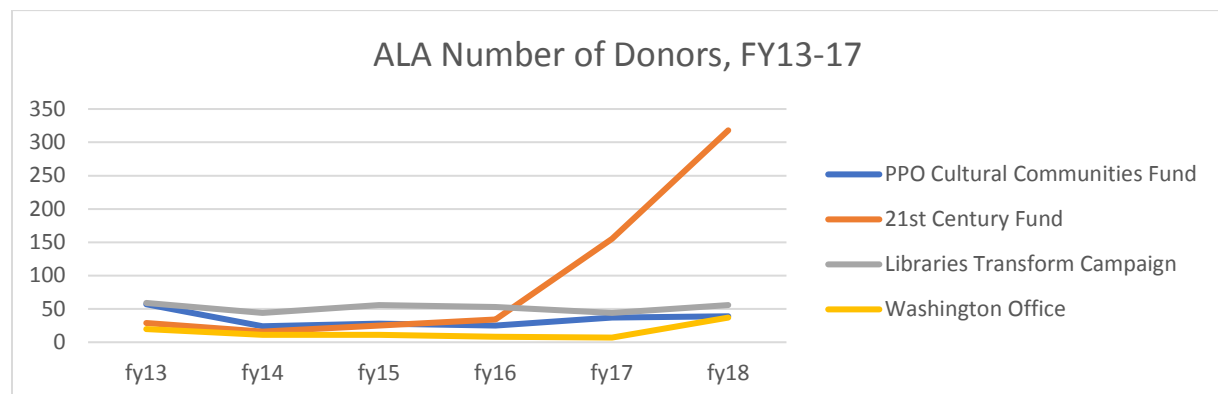
- The Annual Fund activities increased the number of donors to all Divisions, in some cases dramatically.
- Staff and members working together, across the Association, drove stronger fundraising results overall.
- More money was raised overall, and most Divisions saw an increase in donations this year.
- Divisions who ran a concurrent campaign achieved more fundraising success – for example, YALSA and ALSC have deployed an online fundraising strategy for several years.

## Results by ALA Scholarship and Other Fundraising

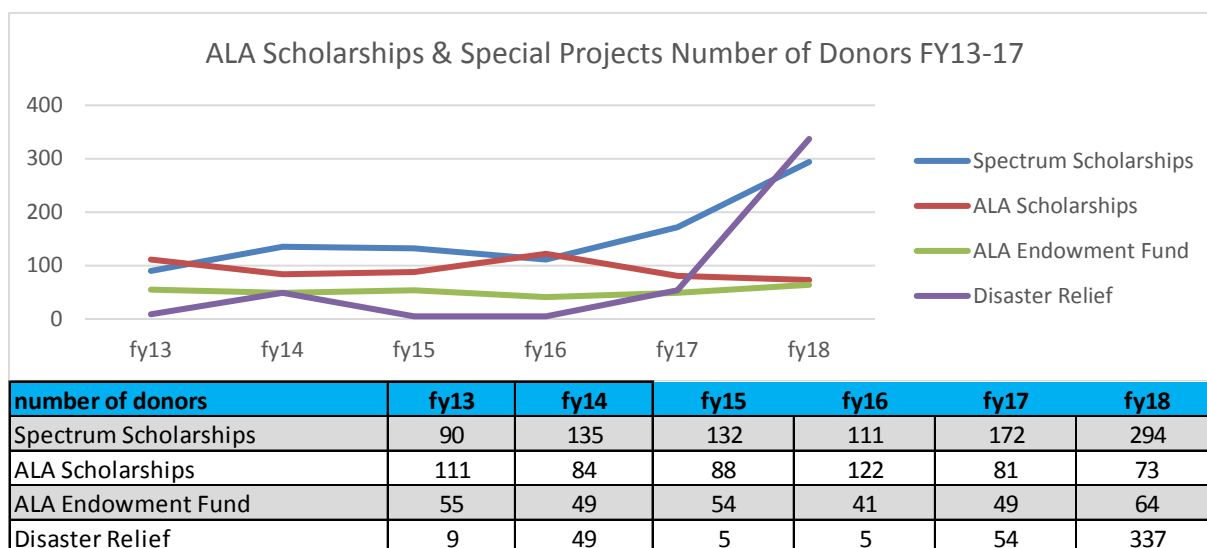
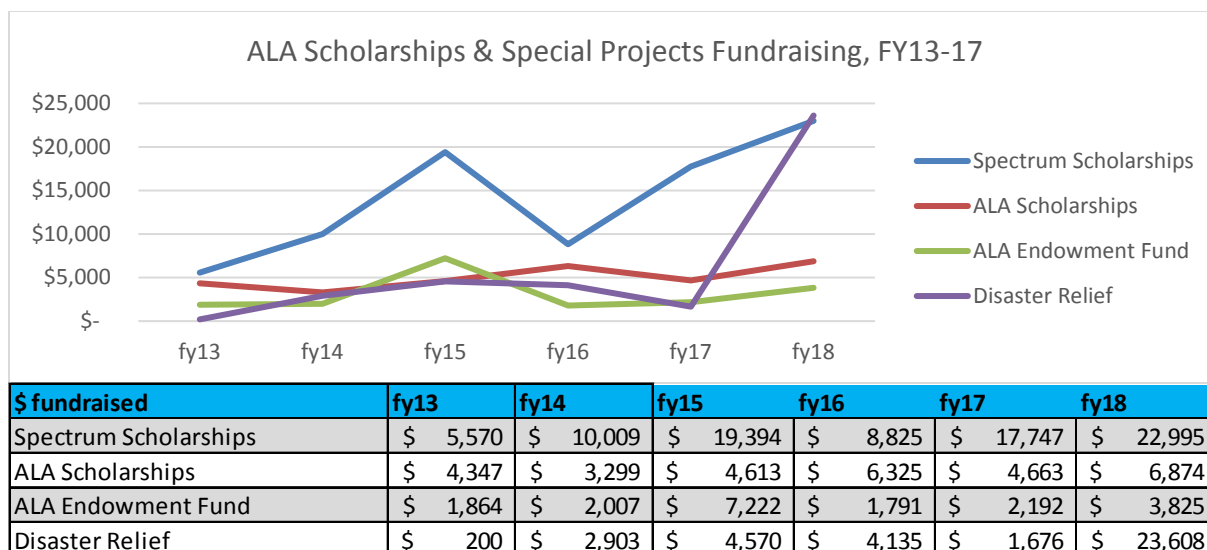
We picked the eight largest of the ALA Funds. We tried to match alike funds, and we consolidated some of the funds. For example, Spectrum includes all named Spectrum Funds. ALA Scholarships includes all named ALA scholarships.



\$ fundraised	fy13	fy14	fy15	fy16	fy17	fy18
PPO Cultural Communities Fund	\$ 3,665	\$ 1,183	\$ 1,645	\$ 5,150	\$ 11,521	\$ 11,772
21st Century Fund	\$ 921	\$ 790	\$ 1,429	\$ 2,920	\$ 10,831	\$ 19,422
Libraries Transform Campaign	\$ 2,063	\$ 2,044	\$ 2,469	\$ 3,379	\$ 2,658	\$ 2,718
Washington Office	\$ 3,116	\$ 1,210	\$ 2,205	\$ 4,170	\$ 2,500	\$ 4,293



number of donors	fy13	fy14	fy15	fy16	fy17	fy18
PPO Cultural Communities Fund	57	24	28	25	37	39
21st Century Fund	29	16	25	34	155	318
Libraries Transform Campaign	59	44	56	53	44	56
Washington Office	20	11	11	8	7	37



## Conclusions

- The Annual Fund had a dramatic impact on the number of donors and the amount of money raised, across the board of ALA funds.
- PPO is working with Nancy Kranich on a campaign to support the Libraries Transforming Communities Community Engagement grant, where there is a 1:1 match to all contributions, that boosted returns for PPO.
- Overall, there is tremendous potential to build upon this year's Annual Fund activities and raise more money for ALA Divisions and all of ALA.

## Planned Giving

Planned giving activities at ALA encompass all efforts to educate our members and other about opportunities to leave a legacy to ALA. Through the Legacy Society and the 1876 Club, we engage individuals around opportunities to make a planned gift to any ALA unit.

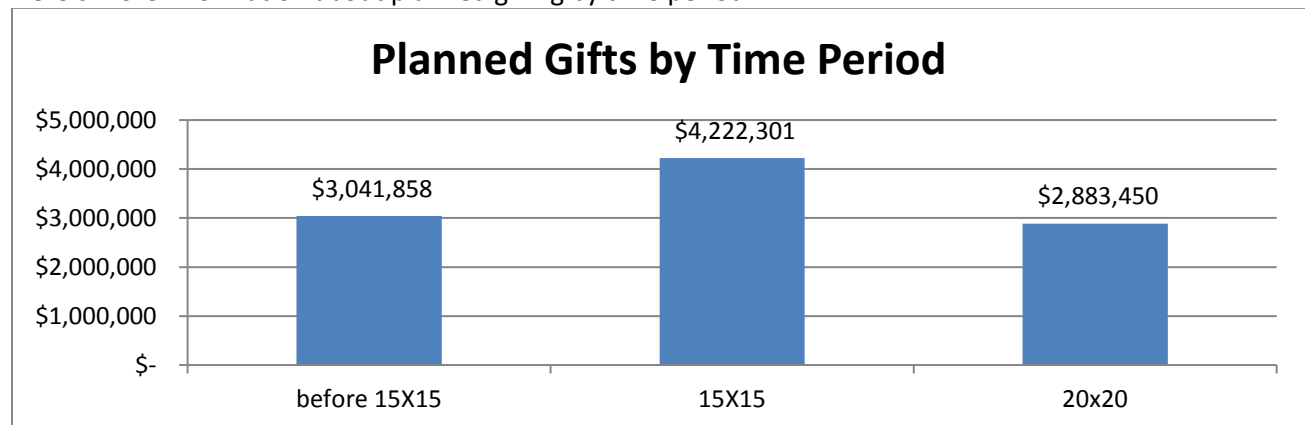
## 20x20 Campaign

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 \$3 million in planned giving pledges to count towards the 20x20 campaign.

FY17 Activities for the 20x20 Campaign:

- 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 summer of 2018.
- One page update on ALA accomplishments to be sent to donors and prospects.
- Ads in American Libraries promoting the Legacy Society

Here's more information about planned giving by time period:



Here's more detail about the pledges reflected above:

New Planned Giving Pledges to ALA, March 2016 – Dec 2017		
	Approximate Pledge Amount	New Members
1876 Club	\$781,750	12
Legacy Society	\$2,101,700	10
Total	\$2,883,450	22

### 1876 Club

Since the start of the Club in April of 2017, 12 members have been recruited, with planned gift pledges totaling over \$781,750.

Activities to promote the 1876 Club in FY18 include:

- Host a gathering for 1876 Club members and prospects at Midwinter Meeting 2018.
- Summer 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 2018.
- Ongoing meetings with 1876 Club prospects.



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

National Library Week was celebrated during the week of April 8<sup>th</sup>-14<sup>th</sup> and the theme was “Libraries Lead.” Misty Copeland, this year’s honorary chair, is a New York Times Best Selling Author, and the first African American woman to be the lead dancer at the American Ballet Theatre. Her best selling book, *Firebird*, was a Coretta Scott King Award winner, and her most recent book, *Ballerina Body*, was an instant best seller in 2017. Misty is the chair during the 60<sup>th</sup> Anniversary of National Library Week, which was first celebrated in 1958. Posters, signage, and resources for National Library Week are available through the ALA Store and the Libraries Transform website.

Library Champions continue to be the main source of funding for the Libraries Transform campaign. Library Champions provide over \$100,000 to fund the Campaign, and top sponsors, including OverDrive and the Dollar General Literacy Foundation, provide an additional \$85,000 to the campaign to support National Library Week. To raise more funds for the campaign, PAO and the Development Office are striving to upgrade Champions to at least the \$10,000 Investor level with opportunities to sponsor library tool-kits through Libraries Transform. Thus far, two Champions have upgraded to the \$10,000 level, and discussion continue to create meaningful member engagement experiences to entice other Champions to follow suit. In FY 18, 14 Champions have renewed to date: Baker & Taylor, Bound to Stay Bound Books, Candlewick Press, Elsevier, Gale, Ingram Content Services, LS&S, Midwest Tape, Morningstar, OCLC, Scholastic, SirsiDynix, Springer Nature, and Taylor & Francis.



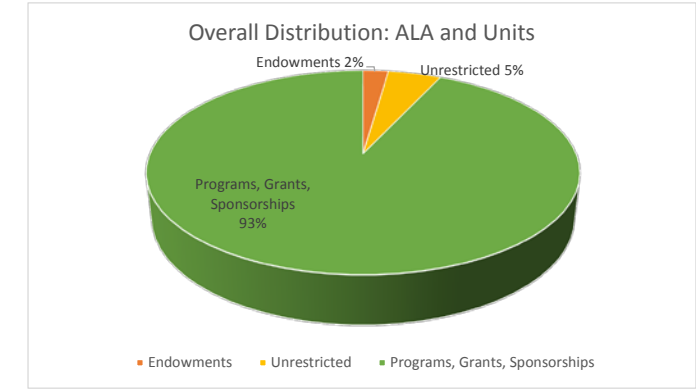
Donations and Grants, FY 2017 Q1+Q2 - September 1, 2017 - February 28, 2018

FY 2018 Q1+2  
Individuals

Type	Number of Gifts	Number of Donors	Amount	Average
ALA Unrestricted	490	463	\$ 26,694	\$ 58
ALA Programs/Grant/Sponsorships	555	502	\$ 41,324	\$ 82
ALA Endowment	621	514	\$ 67,028	\$ 130
Unit Unrestricted	542	451	\$ 53,869	\$ 119
Unit Programs/Grants/Sponsorships	373	298	\$ 244,716	\$ 821
Unit Endowment	163	119	\$ 45,513	\$ 382
	2744	2347	\$ 479,144	\$ 171

FY 2018 Q1+Q2  
Giving from Corporations, Foundations, Organizations and Government

Type	Number of Gifts	Number of Donors	Amount	Average
ALA Unrestricted	25	25	\$ 168,998	\$ 6,760
ALA Programs/Grant/Sponsorships	47	45	\$ 506,253	\$ 11,250
ALA Endowment	13	13	\$ 64,398	\$ 4,954
Unit Unrestricted	12	12	\$ 17,922	\$ 1,494
Unit Programs/Grants/Sponsorships	129	125	\$ 5,147,272	\$ 41,178
Unit Endowment	7	7	\$ 1,040	\$ 149
	233	227	\$ 5,905,883	\$ 10,964

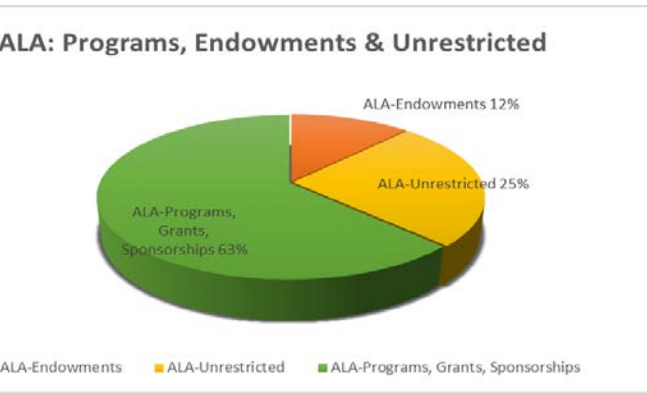


FY2017 Q1+Q2  
Individuals

Number of Gifts	Number of Donors	Amount	Average
271	260	\$ 15,208	\$ 56
166	156	\$ 7,067	\$ 43
496	439	\$ 53,853	\$ 109
274	258	\$ 30,614	\$ 112
257	227	\$ 178,389	\$ 694
84	76	\$ 8,653	\$ 103
1548	1416	\$ 293,783	\$ 190

FY2017 Q1+Q2  
Corporations, Foundations, Organizations and Government

Number of Gifts	Number of Donors	Amount	Average
34	31	\$ 381,692	\$ 11,256
46	40	\$ 593,290	\$ 12,895
11	10	\$ 23,845	\$ 2,168
18	16	\$ 20,804	\$ 1,100
148	133	\$ 1,939,297	\$ 13,103
3	2	\$ 28,586	\$ 9,529
260	232	\$ 2,987,514	\$ 11,490

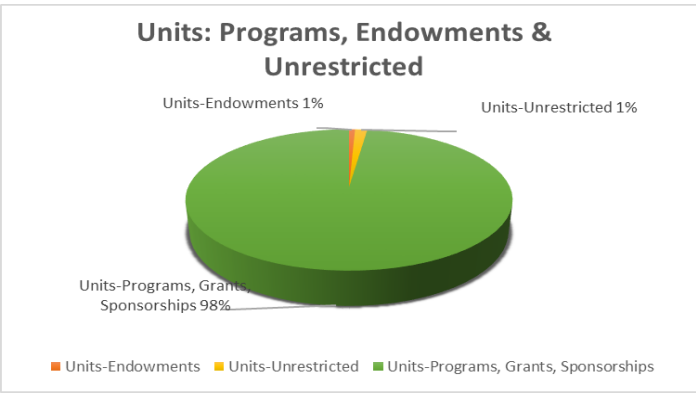


FY2017 Q1-Q4  
Individuals

Number of Gifts	Number of Donors	Amount	Average
642	630	\$ 28,312	\$ 44
261	243	\$ 21,714	\$ 83
794	713	\$ 73,574	\$ 93
501	440	\$ 68,588	\$ 137
500	448	\$ 223,753	\$ 448
147	136	\$ 15,689	\$ 107
2845	2610	\$ 431,629	\$ 100

FY2017 Q1-Q4  
Corporations, Foundations, Organizations and Government

Number of Gifts	Number of Donors	Amount	Average
61	58	\$ 392,355	\$ 6,432
133	120	\$ 1,076,109	\$ 8,091
157	143	\$ 78,291	\$ 499
156	113	\$ 102,519	\$ 657
344	305	\$ 4,944,300	\$ 14,373
41	39	\$ 32,586	\$ 795
892	778	\$ 6,626,160	\$ 7,428



**Donations and Grants, FY 2018 Q1+Q2**  
**September 1, 2017 through February 28, 2018**  
**Cash Flow Analysis**

**Confidential**

**Executive Summary**

**Individual Giving**

- The FY18 Annual Fund campaign was a great success. In the first six months of this fiscal year, we are approximately 10% behind the total number of individual donors we had in all of FY17, which was a tremendous year for individual donors.
- We have also raised more money from individuals to date than we did for all of FY17.
- Three estate gifts, with a collective value of \$180,000 and another substantial restricted gift of \$40,000 are a big part of the reason our dollars are up so strongly.
- Much of the excitement around the Annual Fund can be attributed to a \$100,000 in matching funds that was offered from an anonymous donor. Those funds are not yet disbursed do not show in the fundraising report.
- We anticipate the rest of the year will see growth on a par with the second half of last FY, and are confident that we will end the year with strong growth from individuals.

**Corporate, Foundation, Government, and Organization Giving**

- PLA received a large installment of the Gates Legacy funds.
- Spectrum received a donation from the Medical Library Association.