

ALA Advisory Fundraising Committee

Purpose: To form an ALA Advisory Fundraising Committee Standing Committee by June 2012

Staff Liaison: Director, ALA Development Office

Two-phase plan for the ALA Advisory Fundraising Committee

1. ALA Task Force for Planned Gifts (focus: planned gifts for ALA and units; September 2011 – August 2012)
2. ALA Advisory Fundraising Committee (focus: annual gifts, major gifts and planned gifts; June 2012 and beyond; complete transition to formal standing committee)

Committee Composition

Phase 1-ALA Task Force for Planned Gifts

ALA President would appoint six to eight individuals by September 2011 to serve a one year term through August 2012. Launch of the 100 @ \$100,000 Campaign

Phase 2-ALA Advisory Fundraising Committee

ALA President would appoint six to eight individuals in April 2012 to serve a two-year (three?) term starting June 2012. Ideally, some members from Phase 1 would be able to serve a term.

Committee Charge

Phase I

- To formulate a strategy for planned giving and endowment growth in the short- and long-term, developing ways to involve all ALA members in the planned giving process, establishing clear goals for Planned Gifts to ALA and its units, reviewing and recommending planned giving vehicles, as well as developing an overall planned giving recognition plan for ALA and its units.
- Provide counsel for the development of and formal approval by the ALA Board of Directors on an ALA gift acceptance policy.
- To identify prospective donors from ALA members, the families of living and deceased members, and other individuals.
- To coordinate strategies with the units' planned giving task forces.
- To cultivate donors and solicit when appropriate, on behalf of ALA and its units for the 100 @ \$100,000 Campaign.
- To report to the ALA Executive Board on planned giving activities for ALA and its units.

Phase II

- To formulate an individual giving strategy for annual gifts, major gifts and planned gifts in the short- and long-term, developing ways to involve all ALA members in the giving process, establishing clear goals for gifts to ALA and its units, as well as developing an overall recognition plan for ALA and its units.
- To identify prospective donors from ALA members, the families of living and deceased members, and other individuals.
- To coordinate strategies with the units' development committees.
- To cultivate donors and solicit, when appropriate, on behalf of ALA and its units.
- To report to the ALA Executive Board on giving activities for ALA and its units.

Role Description for Committee Member

Phase I

- Serve as a volunteer ambassador and spokesperson for planned gifts and ALA Endowment Fund to ALA and its units.
- Provide counsel to ALA President, ALA Treasurer, ALA Executive Director and Director of ALA Development Office on the details for planning, launching and implementing planned gifts and the 100 @ \$100,000 Campaign to ALA and its units.
- During the year, participate in meetings and events, as your schedule permits.
- Provide counsel on potential stakeholders and investors that ALA should include in the 100 @ \$100,000 Campaign, as appropriate.
- To cultivate donors and solicit, when appropriate, on behalf of the 100 @ \$100,000 Campaign.
- Provide quarterly report to ALA President and Spectrum Executive Board on planned giving activities for the Initiative.
- Make a planned gift to ALA and/or its units to the best of their ability.

Phase II

- Serve as a volunteer ambassador and spokesperson for individual gifts (i.e., annual, major gifts and planned giving/ALA Endowment Fund) to ALA and its units.
- Provide counsel to ALA President, ALA Treasurer, ALA Executive Director and Director of ALA Development Office on the details for planning, launching and implementing annual fund, major gifts and planned gifts to ALA and its units by individuals.
- During the year, participate in meetings and events, as your schedule permits.
- Provide counsel on potential stakeholders and investors that ALA should include in any initiatives or campaigns, as appropriate.
- To cultivate donors and solicit, when appropriate, on behalf of ALA and its units.
- Provide quarterly report to ALA President and ALA Executive Board and the boards of ALA units, when appropriate, on individual giving activities.
- Make a major gift and/or planned gift to ALA and/or its units to the best of their ability.

Short-term activities and Timeline

Promotion of Planned Giving for the Spectrum Presidential Initiative at 2011 Annual Conference-2015 Project Request of \$27,775
Reprint of planned giving brochure (completed by June 2010)
Though the planned giving brochure for ALA is only four years old, there is fixed content on page 5 that outlines the various planned giving vehicles that ALA will accept. With increased interest in ALA offering annuities as a possible vehicle, the Development Office is recommending a redesign and print of a new brochure which will give the Association flexibility as it adds new planned vehicles to the program as they become available following annuity registration. Also, since 2007, several members have joined the Legacy Society. It is important to show the diversity within the Legacy Society membership.
Includes design, printing, and photography
Planned Giving “Legacy Society Wall” at conferences (Completed by June 2010)
At conferences, ALA offers the brochure in a small kiosk plus highlights Legacy Society members on a double-sided 6’foot sign. Both are placed near the registration area. The Development Office is recommending a Legacy Society Wall—modeling it after the Wall of Library Champions—to communicate to our members through stories and photographs on how planned giving makes a significant difference in the Association. The 2011 Legacy Society Wall would promote the Spectrum Scholarship Program.
Includes design and set up by GES
Planned Giving to Spectrum Scholarship Program, full page in conference issue of AL Magazine (completed by June 2010)
ALA now has three living donors to the Spectrum Scholarship Program, Dr. Betty Turock, William Gordon and Dr. Em Claire Knowles. Dr. Em Claire Knowles is also the newest member to the Legacy Society.
Includes design
Wealth Screening* (work with Task Force to determine data mining from membership database?)
In preparation of building a prospect list for planned giving to the Spectrum Presidential Initiative, as well as building a prospect list for the 100 @ \$100,000 Campaign, the Development Office is recommending a one-year membership with WealthEngine. (WealthEngine is highly recommended by prospect researchers. This is also the most affordable option between WealthEngine, Lexis Nexis, and Blackbaud The Raiser’s Edge.) Wealth screening will enable ALA to strategically determine membership relations that can be enhanced. A membership includes a wealth screening up to 5,000 records, plus: <ul style="list-style-type: none">• Designated Account Manager who is an experienced researcher• Assistance in developing an implementation plan• Assistance in establishing an ROI analysis• Work with the Development Team to pull the best list for the batch screening

- Pre-plan with Development Staff for screening Implementation
- Analyze data for use across programs
- Present data to internal constituencies
- Facilitate Implementation Strategies
- Work with research staff to create prospect pools for internal constituencies
- Provide custom on-site training using your data (1 day on site training session after delivery of completed screening)
- Inclusion in our Best Practices Program
- Annual online training session
- Work with your Development Team to facilitate the integration of your screening results with your existing Donor Management System

One-time planned giving program audit/assessment and planning consultation (work with Task Force to determine consultant?)

As noted, ALA has several marketing tools already in place. Certainly, these help build interest within the membership about estate gifts to the Association. As evidence, each year, without ALA having a planned giving officer on staff to manage a portfolio, at least one or two members announce their intentions about making an estate gift to ALA or a unit. For most non-profit organizations, this would constitute a successful program. However, ALA has a very large, passionate and loyal membership. Many have been members for several years, with many also serving in leadership positions on various Association committees and boards throughout their professional career. The membership has untapped potential for annual gifts, major gifts and/or planned gifts to the Association. An audit/assessment of the planned giving program by a planned giving consultant will identify the strengths, weaknesses, opportunities, and threats (SWOT) of the current program. The assessment could include an evaluation of capacity (i.e., staff and volunteers), analysis of the frontline planned giving process and a review of the “case” and key messages. The outcome would be a holistic, strategic plan which recommends strategic steps for a multi-year strategy that integrates planned giving into all fundraising functions—annual and major gifts—throughout ALA and its units; provides recommendations on what planned giving vehicles outside of bequests could work for ALA, and identifies best methods on training planned giving ‘ambassador’ volunteers.

***Wealth Screening Data Mining**

Could include living or deceased:

- Retiree section and Lifetime members
- Donors (total giving minimum?)
- Leadership
 - Current and past BOD
 - ALA Presidents
 - Current and past council members
 - Current and past division presidents
- Committee Chairs (?)

Exclude:

- Do not contact, do not solicit, Bad addresses, no address
- Student members
- Members lapsed for more than two years
- Friends (non-members)