

**TO:** ALA Executive Board

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

**ACTION REQUESTED/INFORMATION/REPORT:**

Development Office information report.

**CONTACT:**

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**DRAFT OF MOTION:**

**DATE:**

March 23, 2015

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## Executive Summary

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The purpose of the ALA Development Office report to the ALA Executive Board Members is to provide an account 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 place significant concentration on 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.

### 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*

- On January 29, 2015, ALA President Courtney Young, ALA President-Elect Sari Feldman, and ALA Executive Director Keith Michael Fiels met with Library Champions and other business leaders to discuss ALA's advocacy planning and its new strategic direction for the public awareness campaign.
- At the request of the Institute of Museum and Library Services (IMLS), the American Association of School Librarians (AASL) submitted a National Leadership Grants application in January 2015. The project's goal is to extend and build upon the 2013 planning grant, [Causality: School Libraries and Student Success \(CLASS\)](#), and the [School Library Research Summit](#) held in April 2014. AASL proposes a systematic, causal investigation of school libraries as learning spaces. Under the auspices of an advisory board, three research teams will work to conduct meta-analyses in three broad areas of school librarianship: theory, policy, and best practices using a concurrent matrix research design. Each team would independently complete each of the three analyses and then, through peer review of the other teams' work, would verify and expand the findings of the other research teams.
- The following units submitted an application to IMLS for the National Leadership Grants program in February 2015:
  - Association for College and Research Libraries (ACRL)
    - ACRL proposed a one-year planning grant to design a systematic multi-institutional research investigation of academic library impact on student learning and success.
  - Center for the Future of Libraries and Young Adult Library Services Association (YALSA)
    - The proposal seeks to develop clear and accessible recommendations for creating future-focused learning activities and spaces for youth in a variety of library setting, such as small- to mid-sized libraries and for those with varying capacities. The YALSA published report, "[The Future of Library Services for and with Teens: A Call to Action](#)," brought to light the increased demand for America's youth to master an

- expanded set of skills going beyond those traditionally development in academic settings.
- ALA Public Programs Office.
    - The proposal seeks to support the first phase of a comprehensive research agenda into understanding and strengthening the impact of public programming in libraries. The two-year foundational phase would focus specifically on exploring how the characteristics, audiences, outcomes and values of public programming at libraries impact American culture.
  - ALA and the Carnegie Corporation of New York have been in discussion about the [I Love My Librarian Awards](#) and the [Andrew Carnegie Medals for Excellence in Fiction and Nonfiction](#). Carnegie Corporation of New York supported the launch of these programs through grants to ALA.
  - In September 2014, the following ALA units submitted an application to IMLS for the Laura Bush 21<sup>st</sup> Century Librarian Program.
    - Public Library Association (PLA)
      - The project would allow PLA to enhance the existing [DigitalLearn.org](#) site and resources and to accelerate efforts to add more resources for mobile learners, mid-level learners, and Spanish speakers. The new grant will result in 35 new courses, increased functionality, and greater outreach to foster increased engagement among the digital literacy trainer community.
    - YALSA and the [Association for Rural & Small Libraries](#) (ARSL)
      - The project brings together key stakeholders in order to develop and deliver a curriculum and supplementary materials as well as create an online community of learners aimed at librarians and library workers in small and rural libraries that will enable them to better help teens prepare for careers and college.
    - ALA's Office for Diversity Literacy and Outreach Services (ODLOS) and [ProLiteracy](#)
      - The goal of *Adult Literacy: Libraries in Action Project (ALL In Action Project)* is to develop an online training and supporting resources to better equip librarians and library staff to serve adult learners, utilizing recommendations set forth in the recent [Adult Literacy through Libraries \(ALL\) National Library Literacy Action Agenda](#). The development of the Action Agenda was funded by an IMLS National Forum Grant.
  - ALA has submitted a proposal to NEH to create a central archive for the [Awards, Grants and Scholarships Collection](#), with intention to expand to affiliate organizations other library-related groups.
  - ALA Development Office has submitted a proposal to the Nora Roberts Foundation to support the Campaign for America's Libraries.
  - The Center for the Future of Libraries is collaborating with the Knight Foundation on two panels programs at the ALA 2015 Annual Conference. In addition, the Center will be coordinating an additional program in San Francisco with Alberto Ibargüen, president of

the Knight Foundation, and John Palfrey to discuss Palfrey's new book, [\*Bibliotech: Why Libraries Matter More Than Ever in the Age of Google\*](#).

- ALA Public Information Office, Office for Advocacy and *Booklist* are collaborating with the PBS show, [Well Read](#). TV hosts Terry Tazioli and Mary Ann Gwinn will be attending the ALA 2015 Annual Conference. *Booklist* and *Well Read* are planning special activities in San Francisco.
- ALA President-Elect Sari Feldman, PLA, ALSC, and ALA Development Office continue to discuss early childhood literacy and asset exchange opportunities with the [Clinton Foundation](#).
- In February 2015, Allen Inouye, director of the Office for Information Technology Policy (OITP) attended the announcement of [NetGain](#) in New York at the invitation of the Ford Foundation.
- On April 28, 2015, Allen Inouye will represent ALA at the kick off [IMLS Focus Meeting](#) in Washington DC.
- PLA, Reference & User Services Association (RUSA), ALA Public Programs Office and the Office for Research & Statistics, Keith Michael Fiels, Cathleen Bourdon, Associate Executive Director of Communications & Member Relations and ALA Development Office met with the Financial Industry Regulatory (FINRA) Investor Education Foundation to discuss potential financial literacy education programs and research projects in January 2015.

#### *Fundraising*

- In cooperation with the Association of Specialized & Cooperative Library Agencies (ASCLA), ALA Public Programs Office will administer a grant of \$350,000 from the National Endowment for the Humanities (NEH) to re-launch the [Great Stories Club](#) project.
- OITP received \$50,000 from Google to support their office in February 2015.
- With funding support for five-years from Jay Toor, husband of Ruth Toor and an ALA Legacy Society member, AASL launched the [Ruth Toor Grant for Strong Public School Libraries](#). The grant will provide financial support to a public school library that is interested in increasing local awareness regarding the importance of school libraries and certified school librarians.
- On Friday, June 26, PLA will officially launch its [performance measures project](#) during a preconference at the 2015 ALA Annual Conference in San Francisco, CA. PLA received a [grant of \\$2,956,530](#) from the Bill & Melinda Gates Foundation in September. Support from the Foundation will accelerate the recommendations by the [Performance Measurement Taskforce](#) (PMTF) on performance measurements for service and programs in public libraries. The first year of the program will focus on developing reliable measures through an iterative pilot phase. The second and third years will push for broad adoption of the measures, training and support tools, and start the work of incorporating measurement into everyday library activity. Information collected through this process will be useful for strategic decision making, planning, and advocacy activities, providing libraries hard data to back up anecdotal success stories.

- In February 2015, the ALA Public Programs Office began accepting online grant applications for [Latino Americans: 500 Years of History](#). In January 2015, ALA received a \$1.48 million grant from NEH to support the project, a public exploration of the rich and varied experiences of Latinos, who have helped shape the United States over the last five centuries and who have become, with more than 50 million people, the country's largest minority group. The cornerstone of the program will be the six-part documentary series *Latino Americans*, which was produced with major support from the National Endowment for the Humanities by WETA for public television.
- In February 2015, the ALA Public Programs Office announced the opening of grant applications for [Phase II of STAR\\_Net](#), which will tour three large interactive STEM exhibits and three smaller panel exhibits to public libraries on the subjects of Space, the Earth, and Technology and Engineering. The ALA Public Programs Office received a grant of \$471,484 from the National Science Foundation for Phase II of [STAR\\_Net](#). The STAR Library Education Network (STAR\_Net) is a national program led by the Space Science Institute's National Center for Interactive Learning. STAR stands for Science-Technology Activities and Resources. Core partners include the American Library Association, the Lunar and Planetary Institute, and the Afterschool Alliance. (AA replaced National Girls Collaborative Project).
- The ALA Public Programs Office received a grant of \$120,000 to support the convening of library experts to advise the Foundation on a new older adult-library service model developed by the AARP Foundation. Three public libraries/library systems have submitted their application to serve as a pilot site to test and evaluate the service model as well as serving on the advisory committee. Westchester Library System (NY) is currently testing the service model.
- The ALA Public Programs Office received a \$25,000 grant from StoryCorps (pass through funding from IMLS) to partner with them on a second round of StoryCorps @ your library grants. Applications are being accepted at <https://apply.ala.org/storycorps> from December 8, 2014 through February 6, 2015, and 10 sites will be selected for a grant on February 27.
- The Center for the Future of Libraries received a grant of \$10,000 from the ASAE Foundation through their 2015 ASAE Foundation Innovation Grant Awards program. For the purposes of this ALA project, the crowdsourcing space will be promoted as a place for librarians to suggest innovative programs and services and for peers to evaluate, rank and comment on proposed innovations. The goal within the space will be to incubate and improve innovative programs or services, to responsibly develop innovations that conform to shared values and standards of the profession, and to provide broad-based support for innovators to launch their ideas within their communities.
- The Office for Intellectual Freedom, SAGE and Conference Services met at Midwinter to discuss more opportunities to engage conference attendees in Banned Books Week. The Office for Intellectual Freedom and SAGE collaborated on a free webinar, [Regional Issues for Banned Books](#) during the 2014 Banned Books Week. In this one-hour webinar, attendees "traveled" from London, to South Carolina, to Texas, to California, to talk with three activists about the problems they face and their efforts to un-ban books

as well as Congresswoman Linda Sanchez (CA 38<sup>th</sup> District) about why their efforts are so important.

#### *Building the Profession*

- ALA Development Office will be managing four programs at the ALA Annual Conference in San Francisco: *Making Philanthropic Decisions: A Meaningful Giving Strategy* (collaboration with the California Library Association); *Conversation with AARP* (Retired Members Round Table and ALA Legacy Society program); *Libraries: the Go-to Source for Unbiased Financial Education Information* (collaboration with Consumer Financial Protection Bureau) and *Smart investing @your library®: Actively Engaging Your Audience* (collaboration with the FINRA Investor Education Foundation)

#### *Organizational Excellence*

- Jeffrey Roth joined the ALA Development Office as the Assistant Director in April.
- ALA Development Office uploaded ALA's [gift acceptance policy](#) to its landing webpage.

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### **ALA Fundraising Priorities**

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#### **15x15 Planned Giving Campaign**

The ALA Development Office continues to work with individuals who have indicated their interest in making a planned gift to the Association in their estate plans, and continues to provide reports, resources and staff expertise to ALA units to assist with their marketing and member outreach efforts.

Since June 2012, twenty-six individuals have joined the ALA Legacy Society; the total number of members is 54. <http://www.ala.org/plannedgiving/legacy-society-honor-roll-donors-0>

As of January 2015, 39% or more than \$5.7 million of the goal has been reached. Since the launch of the campaign, 87 individuals have been asked to join the ALA Legacy Society, of which 22 have joined, 51 are still considering, and 14 have declined. More than 82% of ALA Legacy Society members have designated a unit or a program as the recipient of their gift.

| <b>15x15 ALA Planned Giving Campaign</b> |              |
|--|--------------|
| Total Goal:                              | \$15,000,000 |
| Achieved:                                | \$5,791,187  |
| % of Goal:                               | 39%          |
| Average gift:                            | \$206,828    |

#### Actions:

For FY2015, the following activities have been approved by the Co-Chairs of the 15x15 Campaign, Barbara Ford and Robert Banks:

#### Completed

- Holiday card mailing (co-chairs) ALA Legacy Society coffee break (bring a friend), ALA Midwinter Meeting, Sunday, February 1, 2015.
- Midwinter Meeting, scheduled meetings (attending Barbara Ford, Robert Banks, Kim Olsen-Clark)
- ACRL 2015, booth and scheduled meetings (attending Barbara Ford, Kim Olsen-Clark)

#### Upcoming

- Postcard mailing to targeted ALA members (April 2015)
- Full page ad in *American Libraries* (Conference Issue)
- Brochure mailing (May 2015)
- Annual Conference, scheduled meetings (attending Barbara Ford, Robert Banks, Kim Olsen-Clark)
- Annual Conference: ALA Legacy Society luncheon (bring a friend)
- Full page ad in *American Libraries* (Fall Issue)
- AASL Conference (attending Kim Olsen-Clark)

#### **Campaign for America's Libraries and Library Champions**

On January 29, 2015, ALA President Courtney Young, ALA President-Elect Sari Feldman, and ALA Executive Director Keith Michael Fiels met with Library Champions and other business leaders to discuss ALA's advocacy planning and solicit their thinking on future advocacy efforts.

ALA has submitted a draft narrative to Carnegie Corporation of New York to request funding to extend the [I Love My Librarian Awards](#). ALA is waiting to hear if a full proposal may be submitted. The award program is administered by the ALA Public Information Office via the Campaign for America's Libraries.

Snoopy, in the Joe Cool persona, will be the honorary chairperson of Library Card Sign-Up Month. Snoopy's image and participation is generously provided by Peanuts Worldwide Publishing, Inc.

ALA's website for the public, [LoveLibraries.org](http://LoveLibraries.org) has had a total revamp. It has an improved look with a responsive design to keep America informed about what's happening in today's libraries. Support for the website comes from Library Champions.

The Development Office and PIO continue to explore opportunities for Library Champions to engage with the Campaign for America's Libraries. [TLC-The Library Corporation](#) has increased its annual support to \$10,000 and will be recognized as an "Investor", joining Severn House Publishing. [Burgeon Group](#) is a new Library Champion. ALA Development



Office has submitted a proposal to the Nora Roberts Foundation to support the Campaign for America's Libraries. In addition, the office is finalizing the annual appeal mailing to lapsed and current donors of the Campaign.

Two students from the Student-to-Staff Program have volunteered to work with the ALA Development Office during the 2015 Annual Conference in San Francisco. Library Champions will have an opportunity to meet and engage with these students.

### **Combined Federal Campaign (CFC) and State Campaigns**

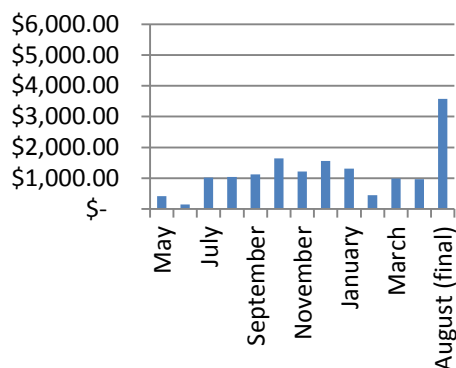
The American Library Association has been accepted by the U.S. Office of Personnel Management for inclusion in the Fall 2015 Combined Federal Campaign (CFC) as a member of the Educate America! federation.

All CFC funds received are unrestricted, and currently have been allocated to United for Libraries. All State Campaign funds are currently allocated unrestricted.

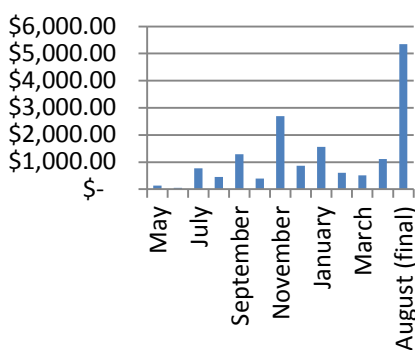
- Pledge data for Campaign 2014 is being compiled by ALA's 3<sup>rd</sup> party vendor.
- Campaign 2013 is open, and has generated \$7,728.16; preliminary reports show \$18,795.93 in CFC pledges and \$2,962.01 in State pledges to ALA. ALA projects revenue of \$16,000.
- Campaign 2012 is closed and generated \$15,800.10 (projected revenue was \$15,000).
- Campaign 2011 is closed and generated \$15,466.44 (projected revenue was \$15,000).

The following graphs outline current monthly distribution patterns for the 2011, 2012 and 2013 CFC campaigns that ALA has participated in:

**Campaign 2011**



**Campaign 2012**



**Campaign 2013**

