

**TO:** ALA Executive Board

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

**ACTION REQUESTED/INFORMATION/REPORT:**

Development Office information report.

**CONTACT:**

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**DATE:** April 17<sup>th</sup>, 2016

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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*

- The Public Library Association (PLA) submitted in February a pre-proposal to the Institute for Museum and Library Services (IMLS) to add new, enhanced features to the DigitalLearn.org website, and to broaden its scope to be more community-focused. The project will build on the foundation to provide libraries nationwide with strategies to reduce duplication of effort, increase library tools and skills, show impact, and engage stakeholders in digital literacy training. These new features will also include administrative interfaces for library staff, where they can manage content, create new modules to add to existing DL content, and access user reports. PLA will develop tools for libraries to assess impact (changes in knowledge, confidence, and action based on learnings) and to engage community stakeholders representing education, employment and other sectors in supporting the library's digital literacy training efforts.
- In February 2016, PPO partnered with Lifetime Arts to submit a 2-page IMLS National Leadership Grant pre-proposal titled "Creative Aging Affiliate Network for Public Libraries." The state libraries of Alaska, Florida, New Jersey and Wyoming are also partners in the proposal, which aims to affect broad-scale improvement in older adult services through state-wide implementation of an expanded and revitalized Creative Aging Affiliate Network for Public Libraries. The Network, established in 2013, offers a proven model of capacity-building services and resources designed to help public libraries develop, implement and sustain innovative arts education programming for older adults.
- PPO has also awarded the first round of 50 grants to libraries across the country as part of the FINRA [Thinking Money](#) traveling exhibition project. The 50 libraries, announced in mid-April, will host a 1,000 square foot traveling exhibit during a six week loan showcasing fun and interactive financial education content. An orientation and demonstration training will take place pre-Annual Conference in Orlando for participating libraries.

- The Office for Diversity, Literacy, and Outreach Services has submitted a grant proposal to the Dollar General Literacy Foundation for the continuation of the American Dreams Starts @ your library program.
- In January, PPO submitted a final report, found [here](#), to the National Endowment for the Humanities for Bridging Cultures: Muslim Journeys. A booklet that provides overview information about the initiative and its accomplishments is available for download at <https://goo.gl/sK66Xc>.
- On Saturday, June 25<sup>th</sup> at 9:30 a.m. in the Hyatt, PPO will host a special Annual Conference program featuring Congressman John Lewis and his *March* trilogy co-creators, in celebration of the NEH's 50<sup>th</sup> anniversary. After an introduction by NEH Chairman William Adams, the co-authors will discuss the relevance and impact of the civil rights movement, the importance of history and literature in meeting the challenges of our lives and our country's future, and the crucial role of libraries in our democracy. A one-hour book signing will immediately follow the program.
- The ALA Gay, Lesbian, Bisexual, and Transgender Round Table (GLBTRT) launched two new awards in FY16 with support of private donations:
  - The Newlen-Symons Award for Excellence in Serving the GLBT Community was established to honor a library, librarian, library staff member, library board, and/or library friends group who the GLBT community. The first recipient was Jean-Nickolaus Tretter Collection at the University of Minnesota Libraries. The award was funded by Robert Newlen, Chief of Staff at the Library of Congress, and Ann Symons, past president and treasurer of the American Library Association and immediate past chair of the GLBTRT.
  - The GLBTRT Award for Political Activism seeks to recognize librarians and library related organizations that have made outstanding contributions in the area of GLBT activism, and consists of a certificate and \$1,000. The first recipients of the award are gay rights activists Michael McConnell and Jack Baker.
- The Office of Intellectual Freedom, Development Office, and SAGE have approached OverDrive to partner at this year's Banned Books Week call-out booth at Annual Conference to provide e-books to supplement the hardcopies of banned books usually provided.
- The ALA Development Office has applied for a second year of funding from the Nora Roberts Foundation to support The Libraries Transform Campaign

### *Fundraising*

- Since September 2015, individuals have contributed over \$24,000 in donations to the Spectrum Scholarship program, with 8 individuals giving over \$500 making them eligible for the Spectrum Leadership Circle. Additionally, 11 Legacy Society members have named Spectrum as beneficiaries in their planned gifts.
  - Three ALA divisions, ALSC, ACRL, and YALSA, will continue their support of named scholarships in the 2016-2017 award cycle. The National Library of Medicine/Medical

Library Association and the Texas Library Association will also continue sponsorship of respective scholarships, while ProQuest will include a final round of 8 scholarships under a current agreement.

- In January 2016, the ALA Gay, Lesbian, Bisexual, and Transgender Round Table (GLBTRT) mourned the passing of longtime leader Larry Romans. Mr. Romans, along with his husband Mike Morgan, generously supported the Stonewall Book Award Endowment fund, donation over \$75,000, including a \$15,000 challenge match in 2014. In honor of Mr. Romans' legacy and lasting contribution to the Stonewall Book Awards, GLBTRT members and friend donated \$1,400 in his memory, with plans for a potential memorial event at Annual Conference.
- The Public Library Association received the second round of funding, just over \$967,000, from the Bill and Melinda Gates Foundation in support of a [performance measure project](#), which will expand adoption of the measures, training and support tools, and begin to incorporate measurement into the everyday work of libraries.
- In December 2015, ALA member Marina (Marney) Welmers made a personal donation of over \$500,000 to the American Association of School Librarians (AASL) to support the creation of four different scholarships: one grant will provided money for collection development, another for special projects run by school libraries, another to support schools affected by natural disasters, and a final stipend which will help fund a librarian position in the chosen school.
  - Additionally, a portion of Ms. Welmers' gift will be applied to reinstate a Spectrum Scholarship under AASL for applicants pursuing school librarianship.
- The Development Office is partnering with the Public Awareness Office to promote National Library Week, and will be sending a direct mail piece preceding the April 10<sup>th</sup> start date to benefit the Libraries Transform Campaign.
- The Development Office and the Public Awareness Office have partnered with Penguin Random House for this year's [National Readathon Day](#), scheduled for Saturday, May 21<sup>st</sup>. The purpose of National Readathon Day is to promote the joy of reading, and was created to help create lifelong readers. During National Readathon Day, libraries, bookstores, and more community centers will host "reading parties" across the country to support reading and literacy. National Readathon Day will support Every Child Read to Read and Libraries Transform through individual and corporate donations which can be made [online](#).

#### *Organizational Excellence*

- Sheila O'Donnell has been hired as the new Director of the ALA Development Office and began on Monday, March 28<sup>th</sup>. Sheila comes with over 15 years of fundraising experience in Chicago and will lead the fundraising and development activities throughout ALA. Welcome, Sheila!

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#### **ALA Fundraising Priorities**

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

The ALA Development Office continues to work with more than seventy 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. A full list of Legacy Society Members can be found here: <http://www.ala.org/plannedgiving/legacy-society-honor-roll-donors-0>

One of the goals of the campaign was to highlight ALA's importance as a recipient of philanthropy to members and the general public. As of March 2016, 47%, or more than \$7.1 million dollars of the goal has been realized. There are currently 75 ALA Legacy Society members, a 108% increase since the launch of the 15x15 planned giving campaign in June 2012.

<b>15x15 ALA Planned Giving Campaign</b>	
Total Goal:	\$15,000,000
Achieved:	\$7,179,309
% of Goal:	47.3%
Average gift:	\$226,718

### **1876 Club**

During 2016 Midwinter Meeting in Boston, Massachusetts, ALA announced the 1876 Club idea, a new donor circle that was designed for younger donors who are already close to the association and getting them to understand what the experience of making a planned gift might mean to them personally and to their profession. To become a member, they will need to be age 50 or younger when they notify ALA of their gift; make a gift of \$1,000 or less to the association, or a division, office, round table or program through an insurance policy or retirement plan; and value philanthropy and passionately support the work of ALA. To recognize these individuals for their gift, the 1876 Club member will receive a certificate and a special ribbon to wear at conferences. If, in the future, an 1876 Club member decides to make a greater contribution to ALA by increasing their gift or including ALA in their will, then they will be eligible to join the ALA Legacy Society upon notification.

ALA identified life insurance policies and retirement plans as the principal giving methods since these vehicles are known to be a convenient and flexible way to make a charitable gift. The individual's only action is to complete a form provided by the issuer of the policy or plan to list the association as a beneficiary. In some circumstances, donating a life insurance policy such as a whole life or universal policy could provide tax advantages. Individuals should consult with an independent legal or financial advisor for specific advice.

Further conversations on how and when to officially launch the 1876 Club are on-going and will continue during Annual Conference in Orlando.

### **Upcoming Planned Giving Activities:**

For FY2016, the following activities have been approved by Barbara Ford and Robert Banks, Co-Chairs of the ALA Legacy Society. Both Ford and Banks have agreed to serve until the 2016 ALA Annual Conference in Orlando.

- Soft launch of the 1876 Club in Boston at the 2016 Midwinter Meeting - ✓
- ALA Legacy Society and ALA Council Coffee Break, ALA Midwinter Meeting, Sunday, January 10, 2016 from 8:00 am to 9:30 am at the Westin Waterfront Commonwealth Ballroom C - ✓
- Full page ad in *American Libraries* for 1876 Club (Spring/Summer Issue)
- Public awareness and promotional launch of the 1876 Club in Orlando
- Self-nomination of the 2016-2017 Co-Chairs from ALA Legacy Society members (Annual Conference)
- Seasonal greeting/thank you card mailing by the co-chairs in November 2016

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

Since the launch of Libraries Transform in October, more than 1,500 libraries have registered to participate in the campaign and well over one million people have seen Libraries Transform-related posts on the ALA and I Love Libraries Facebook pages. There have been more than 80,000 views of the Libraries Transform website and more than 106,000 page views. The #librariestransform hashtag has been used more than 8,000 times.

ALA is especially proud of the reception Libraries Transform received at our Midwinter Meeting in Boston in January. The feedback we heard from members, vendors, and staff has been extremely positive. We believe the wide exposure at Midwinter, coupled with a recent timely message to members from ALA President Sari Feldman has increased greatly the interest in the Libraries Transform campaign.

Since Midwinter Meeting, Steelcase became a new Library Champion at the Member level! Additionally, the following Champions have renewed their membership to Library Champions and their commitment to the Libraries Transform Campaign: Baker & Taylor, Morningstar, Elsevier, Scholastic, SAGE, Gale Cengage Learning, Springer Nature, Innovative, TLC – The Library Corporation, EBSCO Information Services, Sisters in Crime, and ReferenceUSA.

Libraries and library associations across the nation are incorporating the campaign into their marketing and advocacy efforts in many different ways. The Topeka-Shawnee Library is integrating the campaign into its branding initiatives, while several state associations and library groups, including Maine and New Mexico, are using it as their state conference themes. The Ohio Library Council and Minnesota Library Association are using the Libraries Transform campaign as part of their legislative days.

As libraries join the campaign through National Library Week, they are receiving a welcome package that includes a Libraries Transform window cling and Because statement postcards and bookmarks. They also have access to a myriad of resources on the online toolkit, including downloadable marketing collaterals, key messaging, and tips on how to use the campaign.

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

ALA has been accepted by the U.S. Office of Personnel Management for inclusion in the Fall 2016 Combined Federal Campaign (CFC) as a member of the Educate America! Federation.

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

- Pledge data for Campaign 2015 is being compiled by ALA’s 3<sup>rd</sup> party vendor.
- Campaign 2014 is open and has generated \$4,535; preliminary reports show \$14,788 in CFC pledges and \$2,962 in state pledges. ALA projects revenue of \$16,000.
- Campaign 2013 is closed and has generated \$13,925 (projected revenue was \$16,000).
- Campaign year 2012 is closed and generated \$15,800.10 (projected revenue was \$15,000).

The following graphs outline current monthly distribution patters for the 2012, 2013, and 2014 CFC campaigns that ALA has participated in:

