

TO: ALA Executive Board

RE: Report of the ALA Development Office

ACTION REQUESTED/INFORMATION/REPORT:

Development Office Report

CONTACT:

Keith Michael Fiels, Executive Director, ALA
Sheila O'Donnell, Director of the Development Office

DRAFT OF MOTION: N/A

DATE: October 3, 2016

Executive Summary

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.

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

- In May of 2016 the Office for Intellectual Freedom submitted a proposal to the Chicago-based CTU Foundation for its Our Voices Initiative. The Our Voices Initiative is designed to support local authors of diverse content and bring that content to libraries. The grant to the CTU Foundation would support a pilot partnership in Chicago between writers of diverse content and school libraries. Ultimately, Our Voices is about discovering, celebrating, and making widely available those diverse voices that have been too long absent from our libraries and classrooms. OIF and the CTU Foundation continued talks over the summer about how OIF could potentially access funding for the Our Voices Initiative.
- United for Libraries has started its fall campaign for corporate sponsorship. The Board President sent a letter to current and potential sponsors and the formal appeal will go out in October.
- September 25th through October 1st, 2016 was Banned Books Week, a major campaign for the Office of Intellectual Freedom, sponsored by SAGE. Banned Books Week celebrates the value of free and open access to information.
- YALSA submitted a pre-proposal to IMLS for a project to bring together state library agency youth consultants (YCs), as well as representatives from other disciplines in order to facilitate discussions that will lead to a joint vision for teen services and the identification of continuing education priorities among state library YCs. YALSA will implement a design thinking approach to engage a variety of stakeholders and ensure rich discussions. The primary project partner is COSLA.
- GameRT submitted the Will Eisner Graphic Novels for Libraries 2016 report in September 2016 which highlighted the recent round of applications and winners of the Growth Grant, Atlantic City Free Public Library, and Innovation Grant, Birchwood School. During Annual Conference in Orlando, Tina Coleman and Jeffrey Roth met with the Will and Ann Eisner Family Foundation leaders to discuss a possible increase and expansion of the number of grants available after the final round in the current agreement ends next year. Conversations will continue throughout FY17 with a new agreement ready for Annual Conference in Chicago.
- PPO submitted a grant to the National Endowment for the Arts for an ArtWorks Literature grant, requesting \$79,880 for “The Great Stories Club: Inspiring Artists and At-Risk Teens.” The Great Stories Club (GSC) is a three-part, thematic reading and discussion program series developed to engage underserved and at-risk teens through literature-based library outreach programs. The NEA grant would fund visits from the authors and illustrators whose work is on the GSC reading list, to speak with teens who are participating in the program.
- PPO submitted a supplemental proposal to the National Endowment for the Humanities, requesting \$75,000 for planning new Great Stories Club series.

- In celebration of their 50th Anniversary, LITA seeks to raise \$10,000 to provide scholarships to support our value of diversity and inclusion while investing in the future leaders of LITA. We hope to do this in two ways. First, by providing 6 scholarships for new librarians or new to ALA/LITA technologists to attend the 2017 LITA National Forum. Second, by providing scholarships to support 2 additional LITA Emerging Leaders.

Fundraising

- In FY2016, more than \$106,000 was given by individuals, ALA divisions, ALA round tables and organizations to the Spectrum Scholarship Program. ProQuest supported 8 scholarships, including the Ron Clowney Memorial Scholarship. The National Library of Medicine/Medical Library Association and the Texas Library Association continue their tradition of sponsoring annual Spectrum Scholarships. Three ALA units—ALSC, ACRL and YALSA—supported a division-named scholarship. Ten individuals were recognized in the 2015-2016 Spectrum Leadership Circle for gifts over \$500. Legacy Society members supporting the Spectrum Scholarship Program include: Irene Briggs, Michele V. Cloonan & Sidney E. Berger, Trevor A. Dawes, Ellen Fader, William R. Gordon, Dr. Em Claire Knowles, Molly & Ted Raphael, Helen H. Spalding and Karl F. Johnson, Dr. Betty J. Turock, Beatriz Pascual Wallace, and J. Linda Williams. The Spectrum fund provided an expanded number (60) of scholarships in FY2016.
- PLA is in the process of applying to the Bill & Melinda Gates Foundation for a three-year grant of \$1 million for the new African Collaborative Action for Impact (ACAFI), a partnership between PLA, Gates and The African Library and Information Associations and Institutions (AFLIA). The project will support efforts to create a new leadership development path for public library managers in Africa through the African Public Library Leadership Institute (APLLI). APLLI will accomplish the following: Build the knowledge, skills and confidence of library leaders to act in innovative and creative ways in meeting community needs; Foster partnerships between libraries and government agencies, the private sector, NGOs, civil society, and faith-based organizations to work together to improve the lives of community members; and renew approaches to library services, tangibly improving the value libraries bring to communities.
- The American Library Association (ALA) Public Programs Office has been awarded \$243,922 by the Institute for Museum and Library Services (IMLS) Laura Bush 21st Century Librarian Program for a two-year professional development project that will train library professionals in community leadership techniques like coalition-building and dialogue facilitation. Through Libraries Transform: Community Engagement Models for Change, ALA will offer a series of web-based and in-person workshops, all free of charge for participants and specially designed for public and academic libraries. ALA will partner with several change-making leaders — such as the National Coalition on Dialogue and Deliberation (NCDD), Everyday Democracy, National Issues Forum and World Café — to develop and lead the trainings. Courses will be customized to meet the needs of various library types and sizes: small, medium-sized and rural public libraries; large public library systems; and academic libraries. Library professionals serving small and rural communities will be invited to apply for 25 scholarships to defray the cost of travel and lodging for in-person workshops. Through a partnership with ALA's Center for the Future of Libraries, all participants will receive digital badges in recognition of their participation. The project will run from November 2016 through October 2018.
- In August, ALSC received a \$100,000 unrestricted donation from Disney Worldwide Services, Inc. to the Friends of ALSC to support current projects and operations.
- In September, ALSC was awarded its seventh grant from the Dollar General Literacy Foundation in the amount of \$124,000. The grant will support of libraries work in out-of-school time learning and community collaborations.
- In September, YALSA received a grant of \$30,000 from Best Buy to support Teen Tech Week.

- The 2016 report for the Andrew Carnegie Medals for Fiction and Nonfiction was submitted in June 2016 and was approved by the Carnegie Corporation of New York. The second round of funding (\$50,000) was received on September 9th. This is the second of a three year commitment from the Carnegie Corporation of New York to support the Carnegie Awards.
- The 2016 report for the I Love My Librarian Awards was approved by the Carnegie Corporation of New York in September 2016. The second round of funds for the program will be sent in October 2016. This is the second of a three year commitment for the I Love My Librarian Awards from the Carnegie Corporation of New York. The I Love My Librarian Awards are scheduled to be awarded in the Carnegie Corporation of New York's offices in New York City on Thursday, November 30th, 2016.
- Dollar General recently approved the full request amount for Round 7 of the Everybody Reads program, which is managed jointly through YALSA and ALSC. ALSC, after successfully celebrating 20 years of Día programming, seeks to expand and enhance the reach of community engagement by bringing community programs back into the library. YALSA will continue to fund Teen Top Ten collection and their interactive mobile app, as well as a new competition during their 2016 Symposium which will highlight best practices in literacy programs and services for underrepresented youth populations.

Organizational Excellence

- ALA Development Office is continuing to work closely working with ITTS to provide more functionality to our online donations system. We are planning to direct donors to the new system starting with the lead-up to Giving Tuesday. The new system will streamline the giving process and remove barriers to making a contribution (particularly the need to establish an account and login in order to make a donation).

ALA Fundraising Priorities

Development Planning

On July 28, 2016, the Development Office hosted an Association-wide meeting with consultants from Library Strategies, who led us in a discussion about how to raise more money for ALA overall. Participants in the group of 30 included ALA President, President-Elect and Treasurer, along with the majority of the ALA management team, representatives from six divisions, ALA offices, and American Libraries. The group agreed that we would work together to accomplish the following:

- Send an annual fund letter in late October to all members.
- Work together to coordinate a year-end online campaign, with Giving Tuesday as one of the pieces.
- The reply vehicle for all appeals will emphasize that donors can give to any division, office, roundtable or program.

A strong annual fund campaign helps us to identify donors who are major gifts prospects, building the base for a pipeline of donors who are cultivated to give more consistently and larger contributions. Planning is a critical component of a strong fundraising program, and in the future we anticipate the following activities:

- Regular association-wide internal meetings to work together on specific projects and identify opportunities to collaborate for long-term fundraising growth;
- Task oriented meetings combined with strategic discussions;
- Work with the Development Task Force to identify ways for ALA Members to support fundraising efforts in the future;
- Develop a campaign plan and timeline for the 20x20 campaign;
- Explore the possibility of data mining in order to sharpen our efforts in building a major gifts and planned giving campaign;

- Explore the possibility of hiring a consultant to conduct an association-wide development audit.

Development Task Force

In order to support our planning efforts, the Development Office has convened a one-year Development Task Force to support the efforts of the Office during this transitional time, and lay the groundwork for the next iteration of a Development Committee.

Role of the Development Task Force

- Work with the Development Director to develop and coordinate an ALA wide plan for Annual Fund;
- Assist in developing strategies to fundraise from ALA and Division leadership;
- Lead by example, through making a personal financial contribution (of any size) to ALA;
- Assist in identifying strong prospects for major and planned gifts;
- Participate in asks with ALA staff members;
- Support efforts to train Executive Board in fundraising and development.

Activities

- Monthly conference call in FY17;
- Review annual fund letter. Please note that we are working towards sending out the annual fund letter in late October/early November, so we will ask the Task Force to be available to turn around drafts on a condensed timeline this fall, in order to meet that deadline;
- In-person meeting at Midwinter Meeting and Annual Conference (can join by phone);
- Potentially act as a signer of appeal and thank you letters;
- One year commitment, through Annual Conference 2017; participate in evaluation of the process and make a recommendation about role and composition of Development Task Force moving forward.

The Development Task Force includes the following members:

- **Carolyn Henderson Allen**, Dean of Libraries, University of Arkansas (ACRL Budget and Finance Committee);
- **Lenore England**, Assistant Director, Electronic Resources Management at the University of Maryland University College Library (ALCTS Budget and Finance Committee, ALCTS Fundraising Advisory Group);
- **Peter Hepburn**, Head Librarian, College of the Canyons (ALA Member); Rod Hersberger, California State University Bakersfield Library Dean Emeritus, (ALA Sr. Endowment Trustee);
- **Maria McCauley**, Director of Libraries, Cambridge Public Library (Spectrum Scholar, 1999; ALA Councilor);
- **Gary Shaffer**, Ph.D., Chief Executive Officer, Tulsa City-County Library (ALA Member, Former PLA Board and ALA Council);
- **Chisato (Chisa) Uyeki**, Reference & Collection Development Librarian, Mt. San Antonio College (2001 Betty Turock Spectrum Scholar)

Planned Giving

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. The Legacy Society is the umbrella under which all planned giving at ALA falls. Within the Legacy Society, there is space for multiple giving circles or clubs, which primarily describe how an individual enters. Currently, there are several

existing circles: Charter Member, 15 x 15, and 1876 Club. We are also in the process of rolling out the new 20x20 Campaign.

1876 Club

The 1876 Club had a “soft launch” at Annual Conference in 2016. Members of the club distributed close to 300 flyers and spoke about the 1876 Club at Council, various Round Table meetings, and other activities, including one-on-one interactions.

To date, six people have made planned gifts to ALA as a part of the 1876 Club, including Loida Garcia-Febo, Courtney L. Young, Peter Hepburn, Gina Persichini, Andrew Pace, Peter Coyl and Sheila O’Donnell. We have planned the following activities to move the 1876 Club forward through Midwinter Meeting:

- Compile a list of 1876 Club Prospects – mid October;
- Send a letter introducing the 1876 Club and inviting prospects to the Midwinter cocktail party;
- Full page ad in *American Libraries* (Midwinter Issue);
- Have a fun cocktail party at Midwinter for members and prospects of 1876 Club;
- Send out a letter to 1876 Club prospects in spring of 2017 with photos from the Midwinter cocktail party/an invitation to join the 1876 Club.

ALA is pleased to welcome Lenore England, John Lehner, Robert Rose, and April Roy, new members of the ALA Legacy Society. <http://www.ala.org/plannedgiving/legacy-society-honor-roll-donors-0>

Barbara Ford and Robert Banks remain co-chairs of the Legacy Society through Annual Conference. They are working with the Development Office to identify a successor pair of co-chairs.

20x20 Campaign

As an outgrowth of the strategic planning conversations in July and September, we recognized the need for a new campaign which would encompass both planned giving and major gifts. Building on the momentum of the 15x15 Campaign, it was determined that we would begin to promote the 20x20 Campaign. The goal of the 20x20 Campaign is to raise \$10 million in planned and major gifts by 2020.

FY17 Activities for the 20x20 Campaign:

- Holiday card mailing (co-chairs);
- ALA Legacy Society coffee break (bring a friend), at ALA Midwinter Meeting;
- ACRL 2017, scheduled meetings;
- Full page ad in *American Libraries* (Annual Conference Issue).

Libraries Transform & Library Champions

Libraries Transform kicks off year two of its multi-year campaign in October, and as of the end of September, over 4,000 libraries and partners have registered to be a part of the campaign on the Libraries Transform website, and more join every day. September was also Library Card Sign-Up Month, which was chaired once again by Snoopy. During the month, new Because statements were promoted to encourage library card sign-up and general library promotions, as well as National Read an EBook Day on September 16th, a day promoted in part with support from OverDrive.

OverDrive has renewed their support for Libraries Transform activities, including a deeper partnership around Library Card Sign-Up Month, with a sponsorship of \$60,000. This gift will also support President Todaro’s book clubs initiative.

During Annual Conference a VIP Reception was held to honor Library Champions and other major donors to ALA and the Libraries Transform Campaign. During Midwinter Meeting, the Development Office hopes to work with Governance to plan a special Champions activity to discuss the future of the Campaign and ways in which the Champions can play a vital role in the development of future Libraries Transform projects.

The Development Office and PAO continue to explore opportunities for Library Champions to engage with the Libraries Transform Campaign. OverDrive has agreed to continue their high level Libraries Transform (and Library Champion) sponsorship in FY17, which will support the general Libraries Transform Campaign, as well as Julie Todaro’s Book Clubs initiative. Numerous other organizations and sponsorships for Libraries Transform activities are on-going, and will hopefully be finalized over the next few months and ready to announce at Midwinter Meeting. Additionally, here are a few key Library Champions updates:

- The Nora Roberts Foundation made a grant to the American Library Association, Libraries Transform Campaign in June for \$7,500 and has decided to use this annual gift as membership into the Library Champions program.
- The ERT Board is also working with Membership Department to survey existing exhibitors and conference vendors to find out what perks of corporation membership are valued above others. Ron Jankowski and Jeffrey Roth will use this information to possibly restructure the corporation membership levels, including Library Champions, to offer a new perks and benefits structure.

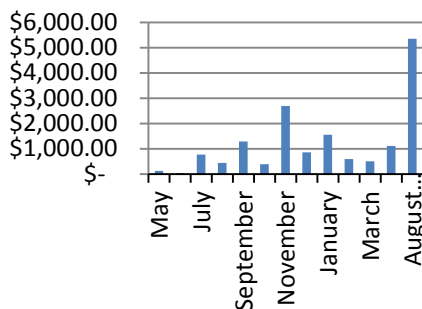
Gabrielle Tuttle and Lori Miller volunteered at Annual Conference this year as part of the Student-to-Staff Program, and were incredibly helpful to the Development staff during Conference set-up, especially during the VIP Reception on Thursday before Annual Conference.

Combined Federal Campaign (CFC) and State Campaigns

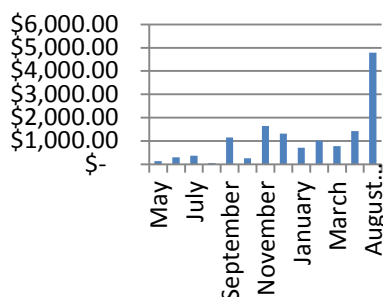
The Development Office will be applying for the U.S. Office of Personnel Management for inclusion in the Fall 2016 Combined Federal Campaign (CFC) as a member of the Educate America! Federation. All CFC funds received are unrestricted, and currently have been allocated to United for Libraries. All State Campaign funds are currently allocated unrestricted.

- Campaign 2014 is closed and generated \$6,511.07 (projected revenue was \$15,000).
- Campaign 2013 is closed and generated \$13,935.61 (projected revenue was \$15,000).
- Campaign 2012 is closed and generated \$15,800.10 (projected revenue was \$15,000). The following graphs outline current monthly distribution patterns for the 2012, 2013 and 2014 CFC campaigns:

Campaign 2012



Campaign 2013



Campaign 2014

