**TO:** PLA Board of Directors

**FROM:** Scott Allen, Deputy Director, sallen@ala.org

**RE:** Fund for the Future/PLA Fundraising

**DATE:** January 4, 2019

**ACTION REQUESTED/INFORMATION/REPORT:**

Report, Input Requested

**OVERVIEW**

PLA continues enhance our skill in fundraising, strengthening participation by corporate vendors to generate more revenue, working closely with ALA Development to strengthen individual giving, doing more grant writing, and creating partnerships with external organizations that might lead to shared fundraising. This report covers recent activity and seeks input from board members on 1) PLA’s 2019 plan for individual and major giving and 2) maximizing vendor support for 2019 activity and the 2020 PLA conference.

**KEY CURRENT ACTIVITIES**

Activities since the last fundraising report in November 2018 include:

* *Vendor giving:* PLA staff and Corcoran Expositions reviewed the results of our survey of 2018 corporate sponsors to help shape 2019 and 2020 appeals. A prospectus was drafted (see end) and will be used beginning in early 2019 to recruit sponsors for both 2019 activity and the PLA 2020 Conference.
* *Individual giving*
	+ *Participation in the ALA Annual Appeal:* In November and December 2018, PLA coordinated activity with ALA Development to promote year-end giving, reviewing and pushing out social media messages and the annual appeal. Results of the effort will be known in February 2019. PLA also contributed $1,000 toward the collective match organized by the ALA Development Office (about 10 ALA units contributed over $15,000 as a match to year-end individual gifts).
	+ *Donor relations:* PLA staff are developing a communications strategy to continually reach out to donors and founding donors for theFund for the Future. We will provide them with insider information, invite them to PLA events, and regularly thank them for their support.
	+ *Major/planned giving prospects:* PLA staff continue to review the prospect researcher’s report on prospects for major gifts.
	+ *75th anniversary fundraising*: PLA is making plans to use the 75th anniversary in its appeals to members for donations.
* *Project funding:*  PLA continued to confirm multiple new project grants.
	+ Total raised from the Microsoft Philanthropies employee giving program will be $400,000, which will support PLA’s activity to provide hardware and training to about 50 rural libraries.
	+ ALA confirmed a $75,000 sponsorship with Capital One, and PLA will receive $43,000 of the funds to do educational programming and communications about financial literacy.
	+ PLA will receive about $60,000 to do some project management for the Washington Office’s grant with Google, which will promote Grow with Google and provide minigrants to public libraries to do digital skills work.
	+ PLA received $20,000 from the National Network of Libraries of Medicine (NNLM) Pacific Northwest Region for a preconference on health equity at the 2019 Midwinter Meeting, and to extend the impact of the educational content through an article and webinar.
	+ In addition, three NNLM regional medical libraries are contracting $150,000 to PLA to add health programming questions as a service area to Project Outcome and to connect Project Outcome to NNLM grantees as their evaluation tool.
	+ PLA submitted a letter of intent to a coalition of funders offering grants of $750,000 for family math initiatives, along with the National Center for Families Learning and the Global Family Research Project.

**REQUEST FOR BOARD INPUT**

1. 2019 Individual Giving Plan

A draft plan for 2019 follows. This plan covers:

* Acknowledgement: how and where PLA will list individual donors. This includes updating the PLA web site listing as gifts are received; refreshing the web site list based on ALA’s fiscal year; and listing donors by name and category twice each year in Public Libraries.
* Donor Relations: PLA’s plan to communicate with donors to develop strong relationships. This includes proposed quarterly communications via email to all donors, and a few additional, special communications to founding donors, to give them early access to information, special invites, etc.
* Fundraising solicitations: This covers multiple categories of potential donors (INDIVIDUAL, FOUNDER, MAJOR GIVER, VENDOR). Outlined in the draft plan are four major individual appeals (library giving day in April, the 75th anniversary campaign appeal in spring/summer, Giving Tuesday in November, and the year-end appeal). These are intended for all PLA members, although the opportunity to solicit *only* from founding donors, or *differently* to founding donors, should be discussed. Also included on the draft plan are ideas to begin reaching out to major gift prospects, and the plan to secure vendors sponsors for 2019 and the PLA 2020 conference.
* Fundraising events: events that could be used to fundraise, recognize donors, celebrate goals, etc. These include many typical events (Happy Hour, Member Breakfast, PLA 2020, etc.)

Questions for the board to consider are: Are the number and timing of appeals appropriate? Are we missing opportunities to solicit founding donors? Will the planned communications achieve the goals of creating strong relationships with donors and encouraging their continued giving? How should PLA proceed with major gift prospects?

1. Vendor support for 2019/2020

A draft, simple prospectus covering both PLA 2020 sponsorship opportunities as well as core PLA initiatives is attached. Corcoran Expositions, staff and the board will use this to solicit corporate sponsorships, primarily from library vendors but potentially expanding to other corporations, government agencies, etc.

Questions for the board to consider are: How can board members and other PLA leaders use their relationships with vendors to benefit PLA? What more can PLA “give” besides listing/acknowledgement to help vendor sponsors meet their goal of better customer engagement?

**PLA STRATEGIC GOAL LINK (check all that apply)**

[ ]  TRANSFORMATION [ ]  LEADERSHIP [ ]  ADV. & AWARENESS [ ]  E.D.I.S.J. [x]  ORG. EXCELLENCE

**PLA DRAFT FUNDRAISING CALENDAR, 2019**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **MONTH** | **January**  | **February** | **March** | **April** | **May** | **June** |
| **General Events** | Midwinter, 24-28Happy Hour, 25Board, 26 |  |  | Board, 7-8Nat’l Lib Week, 7-13Library Giving Day, 10 | Advocacy Day? | Annual, 20-25Member Event, 22Board, 22 |
| **Acknowledgement** | All donor thank you email to 2018 annual appeal donors | PL Jan/Feb: Thank you to 2018 annual appeal donors with biannual donor list covering all of FY18 and FY19 to January |  | PL Mar/Apr: ?? |  | PL May/Jun:, article on Library Giving Day, 75x75 campaign |
| **Donor Relations** | Founding donor email (advance peek at 2018 Year in Review, personal invite to Happy Hour) |  | Founding donor email (preview Library Giving Day, 75x75 campaign) |  | All donor email (thank you for giving in 2018 and for Library Giving Day) | Founding donor email (status of 75x75 campaign, personal invite to AC events) |
| **Solicitations** | VENDOR: first release of 2019/2020 prospectus by PLA and Corcoran |  | INDIVIDUAL: Library Giving Day letter | INDIVIDUAL: Library Giving Day emailFOUNDER, VENDOR: Launch 75th campaign (Apr 10-June 23 TBD)MAJOR: include discussion on board agenda of approaching prospects | VENDOR: reminder about 2019/2020 prospectus, invitation to meet with PLA at AnnualMAJOR: assigned board members to contact 5-10 potential major givers to set up “coffees” at Annual? | MAJOR: see May; board members meet with prospects |
| **Fundraising Events** | Include donor info and envelopes at Happy Hour |  |  |  |  | Celebration of 75x75 campaign, June 23 (event TBD) |

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| **MONTH** | **July** | **August** | **September** | **October** | **November** | **December** |
| **General Events** |  |  |  |  | Board, TBDLove My Librarian, TBD | Giving Tuesday, 3 |
| **Acknowledgement** |  | PL Jul/Aug: | Web site transition: update FYs, remove donors | PL Sep/Oct: Thank you to special campaign donors (Giving Day, 75x75) with biannual donor list covering all of FY18 and FY19 (will drop FY18 donors after this list) |  | PL Nov/Dec: |
| **Donor Relations** | All donor email (thank you for 2018, Library Day, and 75x75 campaign, photos from Annual?) |  |  | Founding donor email (PLA FY19 preliminary results, happy upcoming holiday season) |  |  |
| **Solicitations** |  | VENDOR: reminder about 2019/2020 prospectus, status of what’s “sold” |  | FOUNDER, VENDOR: Second cycle of 75th campaign (dates TBD) | INDIVIDUAL: Giving Tuesday email | INDIVIDUAL: Annual appeal letter (handled by Development) |
| **Fundraising Events** |  |  |  |  |  |  |

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| --- | --- |
| **PLA_RGB** | **Marketing & Advertising Opportunities** |

**The Public Library Association**

PLA is the largest association supporting the unique and evolving needs of public library professionals. PLA serves over 9,000 members in public libraries large and small in communities across all fifty states and Canada, with a growing presence around the world. PLA offers professional development and networking, transformative public library initiatives, and a biennial conference that welcomes public library staff into meaningful partnerships and possibilities.

**Our Members**PLA is the premier place to reach thousands of professionals with **influence** and **buying power**. 65% of PLA members are directors, associate directors, managers, or branch managers!

Library Operating Budget

$1 million-$5 million 43%

$5 million or more 35%

$700,000-$999,999 8%

$400,000-$699,999 7%

$100,000-$399,999 6%

Up to $99,999 1%

Library Specialty

administration, management 47%

youth services 12%

adult services 11%

collections, technical services 7%

marketing, outreach 2%

reference, public services 9%

technology 3%

staffing, human resources 1%

other, no response 8%

*PLA Member Survey, 2017. 1,148 respondents reported operating budgets; 2,280 respondents reported library specialty.*

**It’s our 75th Anniversary! *Include 75th anniversary logo***

**DIAMOND ANNIVERSARY PARTNER – $40,000 (limit 5)**

Benefits Include:

* Recognition at the PLA Membership Breakfast at ALA Conference (June 2019)
* Recognition at other high profile events such as the PLA Leadership Academy, the PLA Past President’s Breakfast, and more (2019)
* Listed Program Sponsor for PLA Conference 2020, beginning in 2019 with *Call for Proposal Papers*
* Comprehensive advertising package in **2019** including a full-page ad in PLA Magazine, PLA eblast, and PLA webinar
* Recognition as a Conference Partner and PLA 2020 Conference sponsorship package including a PLA education session, standing sign, mobile app ad, full-page ad in PLA Magazine, and PLA eblast
* Exclusive sponsor of **one** featured PLA 2020 Conference event such as the Exhibit Opening Reception, Exhibit Closing Reception, How To Festival or Virtual Conference

**EDUCATION PARTNER – $5,000 - $10,000**

Our groundbreaking initiatives do more than develop new skills—they move the profession to ever more innovative places. PLA will work with Education Partners to create new training modules, publications and webinars; promote educational resources via emails and articles; conduct training events for library staff and outreach programs; and more. PLA supports initiatives in the following concentrations:

* [**Digital Literacy**](http://www.ala.org/pla/initiatives/digitalliteracy) **and Inclusion** Community members visit public libraries every day, hoping to complete life tasks many of us take for granted, but lacking the basic computer skills to accomplish them. Through its digital literacy efforts, including [DigitalLearn.org](https://www.digitallearn.org/) and [its](https://training.digitallearn.org/) tools for both computer learners and library instructors, PLA supports its members to make their libraries digital literacy learning centers for all.
* [**Performance Measurement**](http://www.ala.org/pla/initiatives/performancemeasurement) Typically, libraries rely on simple attendance counts and anecdotal success stories to measure the effectiveness of their services; however, these statistics are not enough to guide internal strategy or build persuasive arguments to secure library funding. PLA offers [Project Outcome](http://www.projectoutcome.org/), a program designed to help public libraries understand and share the true impact of essential library services and programs.
* [**Family Engagement**](http://www.ala.org/pla/initiatives/familyengagement) For schools and libraries, family engagement means respectful partnerships that offer the information, guidance, and opportunities for families to be active in their children’s learning and development. PLA is helping public libraries reach out to families of all types, raise up their voices, and reimagine library services through a family engagement framework.
* **Early Literacy** PLA created [Every Child Ready to Read](http://www.everychildreadytoread.org/) (ECRR), a parent education initiative that stresses early literacy begins with the primary adults in a child’s life and empowers public libraries to assume an essential role in supporting literacy within communities.
* [**Consumer Health Information/Health Literacy**](http://www.ala.org/pla/initiatives/healthliteracy) Public libraries are frequently a "go-to" resource as people navigate complex issues of health care, insurance, fitness, nutrition, aging and more. PLA is creating new resources for public libraries around providing health reference, accessing health insurance, offering health programming like health fairs and fitness events, and partnering with healthcare providers.
* **Leadership Development** PLA doesn’t just improve public library services—PLA builds public library leaders by empowering public library professionals with the skills necessary to be innovative and successful leaders of change. PLA accomplishes this through a range of professional development opportunities such as the [Leadership Academy](http://www.ala.org/pla/leadership/development), which empowers public library staff with the knowledge necessary to be innovative and successful leaders of change and the [Dynamic Planning Institute](http://www.ala.org/pla/education/inperson/dynamicplanning), which teaches best practices in strategic planning for libraries with a unique focus on simple, low-cost planning.
* [**Equity, Diversity and Inclusion**](http://www.ala.org/pla/initiatives/edi) PLA is helping libraries achieve their mission through the core values of openness and inclusiveness by developing resources to create models and share best practices. Regional training events will help library staff understand power and oppression and make plans to improve their libraries and communities. Our Inclusive Internship Initiative pairs diverse students with 50 libraries nationwide to strengthen the pipeline of public library workers.
* **Advocacy and Awareness** PLA plays a major role in public library advocacy and in influencing public perception about the library.

**CONFERENCE PARTNER – $1,000 and up**

PLA’s biennial conference attracts 8,000 public library staff and stakeholders from around the world. This multi-day event offers over 100 top-quality education programs, author luncheons and social events, and a bustling exhibits hall. Sponsors get name and logo recognition by supporting programs, social events, conference services, and more. Opportunities include\*:

**Networking Events**

* Exhibit Coffee Break ($5,000)
* Exhibit Opening Reception ($7,500)
* Exhibit Closing Reception ($7,500)

**Branding**

* Make My Day Vouchers ($2,000)
* E Mail Marketing ($4,000)
* Countdown Newsletter ($4,000)
* Other opportunities TBD after site visit

**Graphics**

* Standing Sign Boards ($3,000)
* Table Top Decals ($5,000)
* Charging Station ($5,000)

**Education**

* How to Festival ($7,500)
* Virtual Conference ($7,500)
* PLA Education Sessions (choose from the following) ($5,000 - $7,500)
* Immersion/Off Site Experience Activities ($5,000 and up)

**Technology/Advertising**

* Push Notification ($1,500)
* Ad on Mobile App ($2,000)
* Ad in PLA Magazine ($2,387 – 4/C, Print)
* PLA Eblast ($1,500)
* PLA Webinar ($1,000)

\*Conference opportunities based on 2018 events and are subject to change as the PLA’s planning groups determine the final content for 2020

All Conference Partners receive the following additional benefits:

* Recognition on the PLA Conference website and www.pla.org
* Recognition on the main PLA sponsor banner at the entrance of the Conference
* Verbal recognition from the podium at the Opening General Session and Closing Session
* Recognition on PLA sponsor slideshow during walk-in and walk-out of the Opening and Closing Sessions
* Sponsor recognition in Show Daily
* Priority booth selection for the PLA 2022National Conference (priority determined by sponsorship level along with number of years exhibiting and total sqft of exhibit space)
* Sponsor badge ribbons for your booth staff at the National Conference

**PUBLICATIONS & ADVERTISING**

PLA keeps its members up-to-date on activity in the public library field and educates them about critical issues in serving communities through PLA E-news, [*Public Libraries* Magazine](http://www.ala.org/pla/resources/publications/publiclibraries), [Public Libraries Online](http://publiclibrariesonline.org/), [The Public Libraries Podcast](http://publiclibrariesonline.org/category/media/podcast/), and more. PLA’s new [Quick Reads](http://www.ala.org/pla/resources/publications/books) series educates librarians about essential topics in under 100 pages. The PLA [website](http://www.ala.org/pla/) includes [Professional Tools](http://www.ala.org/pla/resources/tools) that library staff consult to make sure their programs, services and policies are exemplary. Reach a broad public library audience through advertising and sponsorship of PLA’s publications. Help PLA develop new publications by suggesting and sponsoring a topic. Opportunities start as low as $500.

**Print Opportunities**

***Public Libraries Magazine***

Published bimonthly, Public Libraries is the official journal of the Public Library Association (PLA), a division of the American Library Association. Its purpose is to address the continuing education and professional development needs of public librarians and trustees. Feature articles and regular columns deal with current issues and trends in public library service.

**Digital Opportunities**

* **Public Libraries Online**
* **PLA E-News** Banner advertisement featured in a monthly email from PLA to membership base
* **PLA E-Blast** Your custom HTML message will be sent to approximately 2,000 members who have opted to receive third-party emails via PLA
* **PLA Webinar** PLA hosts monthly webinars that are specifically designed for the public library world. Topics address current issues as well as perennial subjects and offer peer-to-peer learning opportunities