

ALA American Library Association

ALA Executive Director's Report to ALA Executive Board

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April 5, 2021

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ASSOCIATION UPDATE

The third quarter of FY21 finds the American Library Association busy launching key new programs designed to support libraries nationally that have been adversely impacted by reductions in funding even as their communities turn to them for increasingly urgent information access and digital connectivity needs; and unveiling new initiatives to ensure that the library workers who run them have expanded access to the educational resources, practitioner networks, data and trends analysis, and opportunities to apply for grants and individual financial support needed to ensure that their libraries and careers remain productive and impactful. This report summarizes just a portion of that activity. Its main goal, however, is to capture some of the initial unit-level planning and recalibration that ALA's new pivot strategy, "The Path to Transformation," has catalyzed. While the pivot strategy focuses primarily on the membership growth and retention and revenue generation and management necessary to increase ALA's effectiveness at driving the public visibility and reach of libraries of all kinds, its key performance indicators point to tangible goals and tactics that connect to the association's core values and ongoing work, especially advocacy at the national and local levels; equity, diversity, and inclusion; intellectual freedom; programming; publishing; education and professional development; as well as how these efforts manifest in ALA's divisions. As summarized here, that work in its myriad manifestations and iterations becomes even more potent when aligned and syncretized, an achievement that is one of the pivot strategy's chief goals and must be a shared one across the association.

ALA Leads Charge on Library Inclusion in American Rescue Plan Act

In perhaps the single largest win for libraries netted in its 75-year history, the **Public Policy and Advocacy Office (PPA)** has been widely recognized for its successful advocacy to ensure that libraries were included in and remained a part of the of the \$1.9 trillion American Rescue Plan Act (ARPA) passed by Congress on Wednesday, March 10th, 2021. The package contains \$200 million for the Institute of Museum and Library Services (IMLS), representing the largest single increase in the agency's 25-year history, as well as \$178M in Library Services and Technology Act funding and \$7B in Emergency Connectivity funds. That libraries of all types will be able to draw down to fund strategies related to broadening digital access in their communities. PPA and ALA-wide staff who lent support are to be commended for the strong working relationships it has cultivated with Senator Jack Reed and Congressman Andy Levin, both foremost library champions whose leadership helped to ensure that libraries and the communities that rely on them were not left behind.

Membership Committee and Member Relationship Services Propose Membership Retention Strategy

At the beginning of the pandemic, the Committee on Membership agreed that ALA should explore establishing a fund to support members during challenging times (not limited to COVID-19). This sentiment has been echoed in various conversations throughout the organization over the last few months. Earlier this quarter, the Membership Committee proposed to establish the "ReMember Membership Fund" for which ALA's general fund has provided seed funding to underwrite the renewal or reinstatement of ALA basic membership dues for member-library workers who are experiencing financial insecurity as a result of layoffs or reduction in wages. The fund is intended to ensure that impacted members can maintain a vital connection to the career and peer support provided through ALA's active membership network. ALA Members will be asked to contribute to this fund that provides recipients with a non-renewable sponsorship to cover their ALA basic membership dues for one year. Recipients will be limited to current Regular, International, Library Support Staff or Non-Salaried members and those holding one of these four membership types whose membership has lapsed within the last 3 years. In addition to establishing this fund, ALA will continue to offer the following flexibility to all members:

- Ability to pay dues through semi-annual installments with a nominal service fee.
- Discounted Non-Salaried Membership for those earning less than \$30,000 annually.

- An extended membership grace period of 5 months during the pandemic.

The ReMember Fund will launch during National Library Week 2021 and will encourage donations through the end of April to add to the initial \$15,000 seed fund amount which will sponsor at least 100 Regular Members to start. This program was developed by reviewing the dues waiver processes and hardship funds of ALA's Divisions as well as those of other associations including: ACRL Membership Funding for BIPOC Library Workers; ALSC Relief Renewals for BIPOC Members; REFORMA Familia Fund; Emergency Nurses Association; and more.

ASGCLA Transition Update

Now, more than six months after ASGCLA's dissolution and the rollover of key duties to other units, ALA has conducted a review of how its former constituents and statements of work are faring. Both ODLOS and RUSA which together have absorbed 90% of ASGCLA's former activity have provided updates.

In September 2020, with the dissolution of ASGCLA, ODLOS welcomed the following interest groups: Bridging Deaf Cultures; Consumer Health Information Librarians; Library Services for Dementia/Alzheimer's; Library Services to the Incarcerated and Detained; Library Services to Persons with Print Disabilities; Tribal Librarians; and Universal Access. In the first six months of the transition, ODLOS has focused on outreach and engagement, primarily building communications and relationships with the interest groups, and on welcoming, onboarding, and learning from key ASGCLA stakeholders and staff liaisons to the groups. In December, the office held an informational meeting with the interest groups to welcome them, share information about ODLOS, and discuss ways the interest groups can collaborate to further the Office's mission and expand its reach. A significant step during this first period was migrating the interest groups' communication channels from Sympa to Connect. ODLOS has several efforts in development with interest groups. The Library Services for Dementia/Alzheimer's (LSDA) interest group is in the process of creating a new award, to be housed in RUSA: the Stephen T. Riedner Grant for Life Enhancing Library Programs for People Living with Dementia. The grant is designed to promote library services and programs directly to people living with dementia. Staff and the LSDA Chair have submitted the necessary paperwork and initiated the endowment process. Library Services to the Incarcerated and Detained has changed their name to "Library Services to the Justice-Involved" (LSJI) and expanded their scope to include "those who provide services to underserved adults and youth who are incarcerated (jail or prison), detained, recently released, paroled, or living under supervision." LSJI, along with the Accessibility Assembly, has a representative on the Intellectual Freedom Social Justice Working Group. LSJI also recently initiated the process to establish a group to update the ALA *Library Standards for Adult Correctional Institutions*, last updated in 1992. Finally, ODLOS is exploring a webinar on accessibility in collaboration with the Universal Access interest group and the Accessibility Assembly and are developing a survey for the interest groups to help us assess processes and identify opportunities.

RUSA became the new home for three former ASGCLA groups, the Federal and Armed Forces Libraries Interest Group (FAFLIG), the Physical Delivery Interest Group (PDIG) and the Accessibility Assembly (AA). Priority was given to ensure a smooth transition operationally for these groups. Communication channels, records and files were successfully moved over, and the work of the groups did not experience any noticeable interruptions. As new groups to RUSA, efforts have been made to provide opportunities for these new member groups to introduce themselves to the RUSA membership and share the unique work they are all involved in. Recently a [RUSA Town Hall](#) was presented as a way to showcase these new groups. Separately, the Physical Delivery Interest Group held an association wide discussion group in December, the Accessibility Assembly has made updates to its stable of [toolkits](#) and those have been shared widely through RUSA promotional channels, and in January the RUSA Executive Director and RUSA president had an opportunity to meet with FAFLIG at their Executive Committee meeting and share feedback on the experience of the transition to date. The transition

and onboarding of FAFLIG, PDIG and AA to RUSA has so far met expectations. RUSA is confident and excited these new groups will continue to prosper and establish themselves in our membership community.

National Library Week (April 4 - 10, 2021)

This year will use the theme "Welcome to Your Library." Key events:

- Sunday, April 4, [School Library Month](#) launches
- Monday, April 5, The State of America's Libraries Report: Special Edition is released
- Tuesday, April 6, [National Library Workers Day](#)
- Wednesday, April 7, [National Bookmobile Day](#)
- Thursday, April 8, [Take Action for Libraries Day](#)
- Friday, April 9, ALA announces new grant program

Actress and author Natalie Portman will serve as 2021 National Library Week honorary chair. Additionally, Dan Rather is confirmed to give an author talk for April 8th, which is Take Action for Libraries Day during National Library Week. This will be a live event hosted by United via Zoom targeted at the general public (but of course library staff welcome to attend too!). Donna Seaman will interview Mr. Rather. Event time is 7:30 pm eastern on Thursday, April 8, a day to rally advocates to support libraries. It is hoped Mr. Rather will use his popular social media channels to promote to the public. On Friday, April 9, ALA will announce a new grant initiative to support libraries whose communities are evidencing information access and digital connectivity disparity.

First Widescale Study of Race and LIS workforce Retention

ALA seeks to create increasingly effective mechanisms for ensuring a racially and ethnically diverse corps of professionals working in and leading our nation's libraries. Toward that end, along with its ongoing diversity and inclusion efforts, as part of successful grant-seeking efforts, funder support will allow ALA to lay the groundwork to hire a research team to conduct the first widescale study of the impact of race on LIS workforce retention. This timely demographic analysis will help to inform nationwide efforts to promote and diversify the LIS field for years to come. The National Associations of Librarians of Color (NALCo) have been approached to serve as co-principal investigators.

Select Division Events this Quarter (see full division reports for more comprehensive reporting)

- **AASL Advocates for Well-Equipped and Well-Staffed Libraries during School Library Month**
Each April during School Library Month, the association celebrates the essential role of strong school libraries in transforming learning. For this year's celebration, the American Association of School Librarians (AASL) seeks to raise awareness of the unique contribution school libraries make to both teaching and learning. Various resources are available for download and emphasize school libraries as welcoming places that empower students and transform learning. Videos from past School Library Month spokespeople – including Dav Pilkey, Jason Reynolds, and Julianne Moore – provide powerful testimony about the value of school libraries – and can be downloaded to school library websites or sharing over social media. In addition, there are a host of other resources and programming ideas to enrich the celebration – including galleries of quotes from authors and school library ambassadors, an Open Education Resources toolkit, and the AASL Developing Inclusive Learners and Citizens activity guide. Throughout April AASL will not only celebrate the accomplishments of school librarians during

the past year of pandemic learning but will also be announcing the recipients of its prestigious awards program. For more information on School Library Month, visit: www.ala.org/aasl/slm.

- **ACRL's Division Conference will be held April 13-16** with the theme, "Ascending into an Open Future." The current higher education environment calls for continually innovative ways to advance student, faculty, and institution. The mix of live and on-demand programs available for 30 days, ACRL 2021 offers the programming you need to get ahead. The program features sortable tags and a variety of session types making it easy for you to plan your days and choose the programs most beneficial to your professional growth. Multiple formats fit every learning style, from five to 60 minutes, from large groups to one-on-one. For more information visit: <https://conference.acrl.org/>

Finance Update

ALA's Accounting Team continues to work to bring ALA's financial reporting back on track after the end of a contract outsourcing the service. Though the Finance Team has kept to the publicized reporting schedule, the unit will face the additional press of preparing for the scheduled summer audit and guiding ALA's more than three dozen business units through the development of the FY22 budget. As part of its ongoing change management efforts, ALA has initiated a **quarterly expense and revenue monitoring process** of meeting with select Unit Managers to review financial performance. This has been met with a good reception. The goal is to course correct financial performance and adjust revenue to expense ratios in real time where needed.

Human Resources/Staffing Update

ALA currently has the following open searches:

- ACRL Executive Director (search underway)
- PLA Executive Director (search underway)
- ODLOS Director (search underway)
- CIO (search underway)
- CFO (search underway)

Pivot Strategy Update

As part of the Pivot Strategy calls for greater alignment and coordination across the association, staff have identified key areas of work where cross-functional teams are needed to maximize association effectiveness and member benefit. The underlined teams will be developed through the end of FY21. Those not underlined will be solidified by or before the end of FY22. Suggestive of areas that call widely for continuous improvement and closer collaboration, every ALA staff member will be assigned to one of the following teams:

Draft Cross Functional Teams

1. Awards
2. Communications
3. Conference Services
4. Continuing Education
5. Customer Service
6. Data, Design, and Research
7. Equity, Diversity, and Inclusion
8. Governance
9. Grants, Partnerships & External Relationships
10. International Relations

11. IT
12. LIS Education
13. Membership
14. Mentorship
15. Policy Monitoring
16. Professional Development
17. Program Assessment
18. Publishing
19. Staffing Synergies & Productivity
20. Strategy & Performance Management

A detailed and comprehensive Pivot Strategy update, as well as progress on the teams above will be in the June 2021 Executive Director's report.

REPORTS of ALA OFFICES & GENERAL FUND UNITS

CHAPTER RELATIONS OFFICE

Unit Manager: Michael Dowling
Budget: \$177,834
of Staff: 1.5
Impact Streams Supported: Continuing Education, Contributed Revenue, Membership

Update on Pivot Strategy work and aligned unit goals:

FY21 Membership Goal - Increase joint student memberships and student engagement

Working in partnership with Member Relations and Services, joint-student memberships continue as a bright spot in membership with continued growth. Currently 5,543 (60% of student members). CRO/MRS also partnered on the student networking session at Virtual Midwinter which was a success and included opportunity for students to interact with division leaders and contacts to encourage them to add division memberships along with their ALA membership. Also collaborated with MRS and many other units and leaders on March ALA Live Connect- Leveraging Partnerships with Chapters.

FY21 Continuing Education Goal - Provide needed learning opportunities for Chapters

Partnered with PPA (Megan Cusick) on Chapter Advocacy Exchange: Planning Your Virtual Legislative Day. Held a New Chapter Leaders Orientation in January with 51 attendees in January which focused on the ALA Chapter Partnership. Partnered with PPA on Chapter Advocacy Exchange on a Chapter Leaders Forum that drew 81 members in February. Topics covered included: non-dues revenue; membership; and continuing education.

Major issues, trends, opportunities, or concerns that your unit has or is responding to at the closing of this fiscal quarter:

The pandemic continues to challenge ALA Chapters. Most have seen a reduction in membership since last March, and overall revenue challenges as virtual conferences have not provided as much revenue as in-person events.

Vaccine Working Group

Collaborative effort with PPA staff and leaders of COL, COLA, and CRC and responses from 40 chapters on the creation of the Vaccine Working Group Council Report that will be part of the Council meeting on March 31.

State Legislative Sessions

CRO Program Office and PPA Assistant Director, State Advocacy created monthly Office Hours along with technical representatives from Engage to meet with state Chapter Engage administrators to answer questions and assist them on the development of campaigns and actions for state legislation. This will continue into the next quarter as some state legislative sessions continue.

ALA Covid Relief Fund

Final preparations are underway for the announcement and launch of the \$1.25M Fund on April 8.

Member and Stakeholder Reach

- Over 100 Chapter leaders through the various professional development programs.

- Nearly 100 state-level Engage administrators.
- Thousands of Chapter members who are not ALA members who receive information on ALA Annual and other events and programs through their listservs from initial postings on the ALA Chapter list.

Select Future Activities:

ALA Covid Relief Fund: CRO will oversee ALA's new \$1.25 million dollar grant program that will be open to libraries of all kinds for grants in the amount of \$30-50k. Applications open April 8 during National Library Month. CRO anticipates responding to inquiries from libraries across the country through the deadline date of May 20 and will work with the nine-member review panel to review applications from end of May and middle of June in order to announce winners on June 23. The Development Office secured these funds through grants from the Mellon Foundation and the Acton Fund.

Money Smart Kids Read Support: CRO worked with the Development Office during the quarter to identify and reach out to prospective sponsors for Money Smart Kid's Read program for April 2022. This program was turned over to ALA by the Federal Reserve Bank of Chicago as they could no longer run it due to their inability to continue to work with sponsors.

COMMUNICATIONS AND MARKETING OFFICE

Unit Manager: Stephanie Hlywak
Budget: Approx. \$600K
of Staff: 7
Impact Stream Supported: Conference Services, Continuing Education, Contributed Revenue Membership, Publishing

Update on Pivot Strategy work and aligned unit goals:

In the second quarter of FY21, CMO set several pivot strategy-aligned goals, including the following:

FY21 Membership Goal - Serve as business owner for Julius Jefferson's presidential initiative around brand

With support from Membership and the Exec Office, CMO is working on a scope of work for outside consultants, developing a project timeline, and collecting names of individuals and firms to solicit proposals from.

FY21 Conference Services Goal - Ensure Virtual Annual Conference '21 meets or exceeds paid attendance goals

CMO has launched a digital retargeting campaign with outside vendor to keep conference front of mind and encourage registration and conversion among key audiences, including students and previous attendees.

Environmental Scan

The FY2021 Q2 media landscape is one that's shrinking. According to [Poynter](#), the pandemic caused or hastened the closing of more than 60 local newsrooms across America. (Since 2004, about 1,800 newspapers have closed in the United States, mostly weeklies.) Magazines aren't faring well, either. In a survey of 45 glossy general interest magazines, a [study](#) found that 58 percent, had a lower print frequency in 2020 compared to 2019. Even the once might [O Magazine](#) is moving mostly online and to quarterly. One area where there is more choice is among streaming content providers, which more households are turning to as they cut the [cord](#).

Similarly, legacy programs like Oprah’s Book Club (relaunched in 2019) are finding new way to engage with their audiences outside of the confines of traditional television. [QBC](#) partnered with Apple TV for its specials, and its community engagement model is built mostly on [Instagram](#). Social media also continues to experience disruption. As of January 2021, [TikTok](#) had 689 million monthly active users worldwide, making it the seventh-largest platform in terms of users, ahead of Snapchat, Pinterest, and Twitter. (That stratospheric rise in popularity in just three years eclipses the audience growth of Instagram – which took six years to gain that many users – and Facebook – which took four.)

With so much of our focus devoted to looking at computer and phone screens rather than television or print media, ALA is competing for eyeballs like everyone else. There has never been more content nor have there been shorter attention spans. It remains CMO’s priority to scale our efforts to make the most impact possible in the places we can meet our audiences.

Key Activities

I Love Libraries.org

During the period from January 1 to March 14, [ilovelibraries.org](#) (ALA’s public facing website) netted 144,880 total pageviews. These were our top ten most clicked articles:

1. [Librarians Name Their Top LGBTQIA+ Books of the Year](#) (2684 views)
2. [Why First Lady Jill Biden Loves Libraries](#) (2631 views)
3. [Stephen Colbert is Confounded by this Library Potato Mystery](#) (2400 views)
4. [Ethan Hawke Shares Why You Should Support Your Library](#) (2018 views)
5. [“The Great Gatsby” and “Mrs. Dalloway” Just Entered the Public Domain](#) (1698 views)
6. [People Share How Their Libraries Have Adapted to COVID](#) (1217 views)
7. [Readers’ Most Anticipated Books of 2021](#) (1049 views)
8. [The Mysterious Librarian in Netflix’s “Hilda” Finally Gets a Name](#) (983 views)
9. [Meet 10 of America’s Favorite Librarians](#) (982 views)
10. [Librarians’ Top Graphic Novels for Teens](#) (775 views)

National Library Week, April 4-10

To help libraries prepare for [National Library Week](#), CMO produced a suite of free resources, including digital graphics, activity pages, and media tools like a template press release and sample social media posts. Additionally, library programming ideas were provided in a [day-by-day guide](#) with easy tips for libraries to get involved this year as well as a [blog post](#) about how to successfully incorporate videos into outreach activities to promote the week and engage the public.

Celebrity Video Public Service Announcements

CMO partnered with celebrities [Alyson Hannigan](#), [Ethan Hawke](#), and [Mike Mills](#) to produce new video public service announcements (PSAs) highlighting the value of libraries. Alyson’s PSA encourages the public to find something magical at their library, while Ethan shares how libraries are “one of the most beautiful institutions that mankind has ever created.” In Mike’s PSA, he touts the library as a place where everyone can nurture their creative abilities. The PSAs are available for sharing on social media, websites, and other communication channels to help spread the message about libraries far and wide.

PSA views and engagements:

- Alyson Hannigan PSA: viewed more than 8,400 times and has more than 410 engagements.
- Ethan Hawke PSA: received more than 39,000 views and 2,240 engagements.
- Mike Mills PSA: watched more than 24,000 times and includes 1,200 engagements.

Collaboration with ALA Graphics on Out of Print Products

CMO supported ALA Graphics on the launch of new ALA-licensed products being sold by Out of Print: [Baby](#)

[Yoda tees](#) and [Miss Piggy and Kermit T-shirts](#). To promote the new merchandise featuring READ® poster images, CMO drafted and distributed press releases, shared news on social media channels, and included information on the I Love Libraries website and in the Libraries Transform newsletter. The products have been extremely popular with library lovers and the public, needing to be restocked on several occasions due to high demand.

I Love My Librarian Award, Jan 11 – media relations

The media team secured coverage with the Associated Press and local news outlets, including the [Associated Press](#) (AP). Hundreds of news sites picked up this article alone. Regional coverage for winners was also achieved and included such headlines as:

- [Local Sacramento librarian wins 'I Love My Librarian' Award for bilingual outreach work](#), ABC10 ([Video](#))
- [Sacramento County librarian honored for outreach to Spanish-speaking families](#), KCRA
- [Sacramento librarian wins 'I Love My Librarian' award for local bilingual outreach work](#), ABC 8
- [Librarian Naomi Bishop wins national award for exemplary work](#), Arizona.edu
- [Hayward Librarian Receives American Library Association Award](#), Patch
- [UC Berkeley librarian, a 'home away from home' for Chinese scholars, wins national award](#), Berkley.edu
- [Greenwich librarian one of 10 to receive national public service honor](#), Hamlethub.com
- [ISD's Jane Martellino Honored by the American Library Association](#), Greenwich Free Press
- [2 Bay Area Winners Announced for I Love My Librarian Award](#), NBC Bay Area
- [East Bay library director among 10 winners announced for I Love My Librarian Award](#), The Mercury News
- [Midstate librarian among 10 winners announced for I Love My Librarian Award](#), WITF

Youth Media Awards, Jan. 25

The CMO media team continues to serve as producer of the event, including working with ALA Award Liaisons and award committees to announce 20 award categories of youth and media awards. Support included coordinating virtual production efforts and working with webcast and AV vendors to create a virtual announcement of 2021 selections. More than 18,000 virtual viewers consisting of [teachers](#), parents, book lovers, and ALA members watched as ALA leadership announced the next classics in children's and young adult literature. Media team members also lead media outreach efforts and secured coverage from such high-level news organizations as the [AP](#), [CNN.com](#), [New York Times](#), [NPR](#), [Washington Post](#), [Wall Street Journal](#), [Book Riot](#). Award announcements trended over several social media platforms with the hashtag #ALAYMA.

Jill Biden Closing Session, Jan. 25

The CMO media team worked closely with ALA Conference Services to secure media for the Jill Biden Midwinter Meeting and Event's Closing Session. Such media outlets as CNN, [ABC News](#), Associated Press (AP) attended the event. Biden's remarks were very similar to comments she had given earlier in the week. [AP coverage](#) highlighted the various events that took place earlier in the week and mentioned ALA Midwinter Virtual. Hundreds of news organizations picked up AP coverage. CNN also streamed the session to [multiple affiliates](#), and several posted content to their [social media](#) channels.

Carnegie Award Winners Announced, Feb. 5

The Andrew Carnegie Medals for Excellence in Fiction and Nonfiction were announced on February 5. The awards are the first single-book awards for adult books given by the American Library Association and reflect the expert judgment and insight of library professionals who work closely with adult readers. Media team members developed a media press kit and lead media outreach efforts. Media placement successes included the [Associated Press](#), [American Libraries](#), [Indian Express](#), [Library Journal](#), [Kirkus Review](#), [Shelf Awareness](#), [Publishers Lunch](#), and [Publishers Weekly](#) to name a few.

ALA and I Love Libraries Social Media Metrics

	Followers/Fans	Impressions	Engagements
ALA Twitter	220,789	5,426,556	65,454
I Love Libraries Twitter	58,595	333,627	6,261
ALA Facebook	212,566	2,112,729	153,388
I Love Libraries Facebook	112,347	233,517	25,256
ALA Instagram	61,627	352,238	25,173
ALA LinkedIn	66,193	394,950	19,263

CONFERENCE SERVICES

Unit Manager: Earla Jones
Budget: \$1,064,878 (combined)
of Staff: 8
Impact Streams Supported: Conference Services, Membership

Update on Pivot Strategy work and aligned unit goals:

FY 21 Conference Services Goal - Meet revenue targets for Annual Conference FY21

This will be accomplished through expense management, sound budgeting, stronger communications and controls, goal setting and performance management. The areas of focus this quarter include:

- Enhanced marketing and engagement strategy
- Cross collaborations with CMO, Publishing and Membership
- Securing facility contractual terms that protect ALA in the post-Covid landscape

FY 21 Conference Services Goal - Successfully launch and reach attendance target for LibLearnX in FY22

Work to meet, enrich and celebrate the evolving needs of library professionals, attract, and retain early career and new library workers among others, and to create greater visibility of ALA's assets. The areas of focus this quarter include:

- Establishment of the Program Review Group, a temporary subcommittee of the ALA Conference Committee
- Collaborations with local constituents in San Antonio community for the inaugural year of LLX
- Determining dates and locations for initial 5-years

Describe the major issues, trends, opportunities, or concerns that your unit has or is responding to:

The final Midwinter Meeting and Exhibits - Virtual closed with an attendance rate exceeding the target by 30%, but a financial performance that was off target by approximately 80%. While exhibit/sponsorship goals were exceeded, the overall gap was not filled. These results place added pressure on the performance outcomes of the annual conference to meet cumulative unit revenue goals.

The Annual Conference continues to be primarily affected by external trends and threats. As we launched the registration for June 2021, many of the factors identified in earlier analyses continue to hold and will require pulse checks as we plan, implement, adjust, and reset tactics for success. Internal opportunities include directions to ALA staff on how to encourage member leaders to attend and promote the Annual Conference.

Member and Stakeholder Reach

Event marketing statistics reveal that throughout our eblast timeframe (a total of 3 eblasts, as of 3/26/21) and using our list of approximately 72K, we have delivered 251,705 emails. There are 39,821 ppl who opened and 4,364 clicked -through resulting in unique Annual website visits.

Conference Services in conjunction with the Communication and Marketing Office are making some enhancements to the overall marketing and engagement efforts. Based on the goal of 9,100 paid registrants, it has been determined that the best key strategies are:

- A greater emphasis given to all promotion (social media, website, ads), pointing to various landing pages on the website. The website is the driving piece of our marketing efforts. Consistently updated with new content and offering comprehensive and segmented language on new landing pages.
- Looking into new website design choices. Like adding testimonies, more images, interactive components like Click to Tweet links, etc.
- There are 12 weeks of promotion. During that time, we expect to distribute approx. 27-35 eblasts (the "All" list, plus the varied segments: Students, International, Library Directors, Members Only, First-Timers, etc.).
- Currently looking into building our prospects lists, to include booksellers, schools, and more.
- More social media "buzz". An additional goal is to encourage registrants to share information with associates. (e.g., "This session is important for public school libraries, be sure to attend").
- Heavy focus on 3rd party promotion. Extremely important that everyone promote the event (i.e., ALA Staff, Associations, Board, Committees, Divisions, Speakers, Exhibitors, and even Registrants).
- NEW: Online Advertising - CMO has hired a marketing platform by the name of Feathr for a few of ALA uses, one including conferences. They will be used for online advertising (various websites & Facebook). The agreement includes their guiding CMO on the strategy of the first campaign — they will design the ads, suggest ad placements, and provide analytics along the way.
- CMO is, again, using a percentage of the Google Ad Grant to direct online keyword searches directly to our Annual website.

Select Future Activities and Events Through End of Next Fiscal Quarter:

On March 1, 2021, Conference Services launched registration, marketing, and promotion for the Annual Conference (<https://2021.alaannual.org/>). The official dates are June 23-29, 2021. The conference will be produced in a virtual format with a target of 9,100 registrants. The event highlights will include:

- Educational Programming
- News You Can Use
- Author/Speaker presentations
- The Library Marketplace: Exhibitors, Stages & Resources
- Live Chat opportunities

DEVELOPMENT OFFICE

Unit Manager: Tracie Hall/Anne Manly
Budget: \$378,581
of Staff: 4
Impact Streams Supported: Contributed Revenue

Update on Pivot Strategy work and aligned unit goals:

Internal initiatives and activities - The Development Office is currently working with other members of the Revenue Streams group to realize the Contributed Revenue goals of ALA's Pivot Strategy. Going forward, this group will meet regularly to address such topics as emergent issues, funder contacts, internal competition, collective goal setting and intersection, benchmarking, and SWOT analysis.

The Development Office continues to promote the Pivot Strategy through three main areas of focus: prospect identification and realization, gift processing, and campaign development, including individual donations.

The Development Office works to promote the Contributed Income component of the Pivot Strategy by working with individual ALA Units to identify and enhance Contributed Income strategies. The Development Office is working with advisors, most notably the Philanthropy Advisory Group, to codify internal office processes and to build a culture of philanthropy within the Association. The Development Office is also taking a hard look at how we cultivate, sustain, and thank those individuals whose works have sustained the association, including through seeking their advice and through planned giving.

External initiatives and activities - The Development Office is working to identify funders who may provide infrastructure support for areas such as IT, Finance and Accounting, or Data and Research.

The Development Office is actively identifying those external organizations that share our values (such as intellectual freedom) or interests (such as valuing libraries, story time, after school STEM programs, or senior programming) or needs (such as financial literacy) which may be a pathway towards ALA membership, conference attendance, or support. The Development Office continually works to identify corporate, foundation, individual and governmental sources of support.

The Development Office is working with ALA Units to incorporate larger asks, such as support for general operating funds, as a part of programmatic proposals.

The Development Office is working to expand our concept of our community to bring those individuals, corporations, exhibitors, and foundations which we have not traditionally pursued.

Major issues, trends, opportunities, or concerns that your unit has or is responding to:

The following trends inform Development Office activities:

Charitable giving increased in 2020. Charitable giving in the U.S. increased 10.6 percent on a year-over-year basis in 2020. The study found the number of people making a gift increased 7.3 percent, with an 18.5 percent jump in new donors and a 13.7 percent increase in recaptured donors — those who gave to a charity before 2019, did not give to that charity in 2019, but gave again in 2020. At the same time, the overall donor retention rate continued to fall, down some 4.1 percent, to 43.6 percent — the lowest rate recorded since the project began tracking that data point in 2009. The repeat donor retention rate also fell, down 3.9 percent to 59.6 percent, while the retention rate for new donors dropped 9.2 percent, to 19.3 percent.

According to the report, the growth in giving in 2020 was driven by year-over-year increases of 15.3 percent in gifts of less than \$250, 8 percent in gifts of between \$250 and \$999, and 10.4 percent in gifts of at least \$1,000. More at: <https://afpglobal.org/FundraisingEffectivenessProject>

Online giving grew more than 20 percent in 2020. Based on fundraising revenue data totaling \$40.7 billion from 8,833 nonprofit organizations and online giving data totaling \$3.2 billion from 4,964 nonprofit organizations, a report found that online giving grew 20.7 percent in 2020, and that 13 percent of all funds raised came from online donations. More at: https://institute.blackbaud.com/wp-content/uploads/2021/02/2021_CGR_Print.pdf

Half of adults see negative financial impact of pandemic. Approximately half (51 percent) of non-retired adults believe the economic impact of the coronavirus pandemic will make it harder for them to achieve their long-term financial goals. Based on more than ten thousand survey responses from adults in the United States, the report, *A Year Into the Pandemic, Long-Term Financial Impact Weighs Heavily on Many Americans*, found that among respondents who say their financial situation has gotten worse during the pandemic, 44 percent believe it will take at least three years to get back to where they were a year ago, including about one in ten who don't think their finances will ever recover. Low-income adults are among the most likely to say they or someone in their household has lost a job or taken a pay cut since the outbreak hit the United States, while among those who've experienced job loss or a cut in pay, low-income and Black adults are more likely to say they have taken on debt or put off paying their bills in order to cover lost wages or salary. By contrast, 39 percent of upper-income adults indicated that their family's financial situation has improved from what it was a year ago. More at: <https://www.pewresearch.org/>

Digital fundraising, strategic financial planning key to resilience. Charities worldwide see organizational management capabilities as critical to the resilience of charities in a post-pandemic recovery. Based on a survey of more than eight hundred charities in a hundred and fifty-two countries, the report, *Future-Proofing Nonprofits for the Post-Pandemic World*, found that three-quarters (75.6 percent) of respondents say building organizational resilience will require finding new ways to fundraise with digital technology, followed by using communication more effectively for fundraising and resource mobilization (71.05 percent) and cultivating new and existing donors to diversify funding sources (69.24 percent). Other priorities for charities in the survey include building and sustaining financial reserves (63.38 percent), identifying digital tools for better connecting with stakeholders (61.25 percent), ensuring that organization's engagement efforts and services are broadly accessible, inclusive, and equitable (64.67 percent), and strategic financial planning (52.73 percent). As of December, 93.07 percent of respondents reported being negatively impacted by the pandemic, up from 91 percent in August and 90.4 percent in June but still below the 96.5 percent and 94.36 percent seen in the March and May surveys. Nearly seven in ten (69.95 percent) respondents said they were equipped to remain financially viable amid the uncertainty created by the pandemic and its impact on the economy.

"Charities need to be focused on future-proofing themselves for the post-pandemic world," said CAF America president and CEO Ted Hart. "The resilience of charities relies on the key competencies of nonprofits in organizational management." More at: <https://www.cafamerica.org/covid19report/>

Member and Stakeholder Reach

The Development Office directly or indirectly reached over 34,800 individuals during this most recent quarter. The Development Office's fundraising email for the American Rescue Plan Act went out to 34,800 donors and ALA members. Of those, 12,700 opened it, which is an approximately 15% higher open rate than our average fundraising email. Development's other primary touchpoint with members this quarter was for a fundraiser with the organization Humble Bundle, which supported ALA, Spectrum Scholars, and FTRF. At least 22,000 members and library supporters received an email concerning the bundle and how ALA members helped create it. Our social media reach was approximately 32,000.

Future Activities and Events Through End of Next Fiscal Quarter:

The Development Office with the advice of PAG and support from the Development Office, is seeking submissions from fundraising consultants to provide professional services for a capital campaign assessment and potential capital campaign. The fundraising consultants will assess member, stakeholder, the philanthropic community, corporate community, and the general public's interest in supporting a capital campaign; and (ii) develop a capital campaign based on such assessment. The goal of the capital campaign is to address the need to support ALA's general operations and Endowment.

The first phase of the consultant's responsibilities will likely include the assessment of member, stakeholder, the philanthropic community, the corporate community, and the general public's interest in supporting this campaign. Consultant will be expected to conduct confidential interviews with ALA membership, leadership, directors, and others; identify and evaluate resources available to support a capital campaign; identify challenges to a successful capital campaign; identify potential prospects; complete an audit to assess internal capabilities to support a campaign; and present findings to ALA leadership and directors.

The consultant will be asked develop ALA's case statement and story; conduct confidential interviews with potential prospects; determine realistic campaign goals; and present recommendations to ALA leadership. Finally, the consultant will be asked to develop a campaign plan, including specific goals for dollars raised, milestones, solicitation strategies; develop a campaign calendar; develop a campaign budget; assist in the development of campaign materials; and present recommendations to ALA leadership and directors.

GOVERNANCE OFFICE

Unit Manager: Sheryl Reyes
Budget: \$627,000
of Staff: 3
Impact Streams Supported: Membership

Update on Pivot Strategy work and aligned unit goals:

FY 21 Membership Goal - Increase membership by restructuring ALA Affiliates program

In order to build more transparent pathways for members of affiliate groups to become active in ALA and rise to leadership roles within the association, the Governance Office is working to strengthen those relationships by strategically realigning fees to strengthen relationship and maximize value in FY22.

Governance staff conducted a review of the current Affiliate program, its benefits, and fees to ensure the program and services are still relevant, valued, and sustainable. Since the infancy of the Affiliate program, benefits and fees remained relatively unchanged, so this was a valuable exercise as we look to increase membership and strengthen relationships. A survey was sent to Affiliates in December 2020, and we received an 85% response rate. The next step is to brainstorm with the Affiliates on how we can facilitate a reciprocal

relationship. The goal is to create stronger relationships, which in turn will help increase membership. President-elect Wong agreed to support this initiative and champion this effort. The first discussion with the Affiliates will occur sometime after the 2021 Virtual Annual Conference.

FY 21/22 Membership Goal - Increase the Member-Leader Pipeline by 5% in FY22

The Governance Office is working on a plan to widen the leadership pipeline for members by improving member identification, cultivation, engagement, recruitment, appointment, and volunteer life cycle. Initial discussions on this topic have begun, and a work plan is in development and will be discussed with association stakeholders.

FY 21/22 Membership Goal - Evaluate and Streamline programs managed by the Governance Office (Awards, Leadership Institute, etc.) to increase membership and/or revenue generation in FY22.

A member of the Governance Office is co-leading the effort to assess programs offered organization-wide by ALA. The purpose of this effort is to remain relevant and vital, increasing impact with a more focused menu of ALA services and initiatives. Goals have been drafted, and a cross functional team will be created. Program Assessment for the Governance Office is currently underway. For more than 5 years, the Leadership Institute has been a program managed by the Governance Office, as it originated from a presidential initiative. Internally, we have started transitioning the program to a more appropriate unit more aligned with the goals of the program – Core: Leadership, Infrastructure, Futures. Due to the pandemic, the 2021 in-person Leadership Institute is cancelled, however, the facilitators are exploring a virtual program. The ALA General Awards are administered by the Governance Office and commonly referred to as [Recognition Awards](#). There are [hundreds of other Awards](#) offered through various [divisions](#), [offices](#) and [roundtables](#) throughout the organization. One of the topics most recognized by staff in the Program Assessment charette was the management of ALA Awards. In an effort to better streamline the Awards, a cross functional team will convene to create a more manageable and sustainable awards program.

Describe the major issues, trends, opportunities, or concerns that your unit has or is responding to:

Governance Meetings and Midwinter: Given that the Midwinter Meeting was primarily focused on conducting the business of the Association, the question remains, in light of that meeting's discontinuance and the launch of a new event (LibLearnX), how the governing bodies of the Association will conduct business moving forward. There are currently discussions around convening in conjunction with the new January event (LibLearnX) via a hybrid approach or to convene entirely virtual. The decision will impact the future work of staff in preparation for these meetings. Once decided, it is recommended that a cohesive communications plan is drafted, particularly targeted to our member leaders to facilitate awareness, planning, and preparation.

Member and Stakeholder Reach:

January 2021 Midwinter Governance Meetings

- An average of 329 unique viewers attended the Virtual Council Meetings
- 336 unique viewers attended the Presidential Candidates Forum live, with 396 views (as of March 12) on ALA's YouTube Channel.
- 246 unique viewers attended the Virtual Membership Information Session
- Based on the attendees that completed the meeting evaluation, they rated the following meetings (5 = Excellent to 1 = Poor):
 - Information Session: 4.31 (increase in comparison to the June 2020 governance meetings)
 - Presidential Candidates Forum: 4.27
 - Joint PBA/Division Leadership Meeting: 4.20
 - Executive Board Candidates Forum: 4.17
 - Council Meetings: 4.13 (slight decrease in comparison to the June 2020 governance meetings)

- ALA Executive Board Meetings: 3.94
- BARC Meeting: 3.86

Volunteer Appointments

587 volunteer application submissions: 294 unique individuals; 172 unique individuals appointed in the initial appointments as of March 12.

Election Participation

- Each presidential candidate sent a member e-mail through ALA and achieved a total reach of 93% of members.
- As of March 12, more than 44,000 ballots were sent with 3,074 returned.
- There are a total of 362 unique candidates on the ballot, including Division and Roundtables.

Award Applications

ALA received 62 applications for 13 ALA Awards and 195 books for the two book awards, Schneider Family Book Awards and W.Y Boyd Literary Award for Excellence in Military Fiction.

Future Activities and Events:

Forward Together Resolutions

In the next three months, the members of the Forward Together Resolutions Working Group staffed by the Governance Office will complete most of its work via the following subgroups: Core Values, Executive Board, Committees, Council, Round Tables and Assemblies. Each group will draft resolutions focusing on actions to be presented to Council and then to the full membership. The goal is to complete this work by Annual Conference 2021.

Preparation for the Virtual 2021 Annual Conference Governance Meetings

- ALA Recognition Award winners selected and coordinated for the ALA Award Video for the Award/Presidents Program for Annual Conference
- 2021-2022 Council Committee on Committees (CoC) Election and the 2021-2023 Planning and Budget Assembly (PBA) Election
- Executive Board Meetings, Council Meetings, Council Forums, BARC Meeting, PBA/Division Leadership Meetings
- Inaugural Celebration
- Virtual Volunteer Fair (to be held post-conference for new committee volunteer application round)

Communication

ALA Council communications will migrate to ALA Connect on April 30th. Council will begin using this email address: ala-council@connectedcommunity.org and discontinue using the alacoun@lists.ala.org email address. Council Committees will be migrated to ALA Connect by March 31st.

INTERNATIONAL RELATIONS OFFICE

Unit Manager: Michael Dowling
Budget: \$264,335
of Staff: 1.5
Impact Streams Supported: Conference Services, Continuing Education, Contributed Revenue, Membership

Update on Pivot Strategy work and aligned unit goals:

FY21 Conference Services Goal - Increase international attendance and revenue over FY20

Virtual Midwinter international attendance was 146 which was similar to Midwinter 2020. Revenue for VM was \$11,811, around \$6,000 less than Midwinter 2020. MW20 registration rates were higher than VM and many of this year's attendees were student members from Canada taking advantage of the free registration. The hope is to convert many of them into being paid registrations at Annual. IRO has been working with Conference Services on promoting Annual Conference since registration opened at the start of March to international audiences through direct emails and messages on international lists such as IFLA's main listserv.

FY21 Membership Goal – Increase international membership to tracks to overall membership

International membership continued trending downward at a similar rate as overall membership. FY22 Goal is to begin trending upward in FY22 with a 3% increase. Collaborated with MRS on February ALA Live Connect-Chapters.

FY21 Continuing Education Goal – Work with IRRT, IFLA, etc. to others increase international CE audience

IRO has already exceeded goal with seven already. Only six were held in FY21. More planned for later spring and summer.

Describe the major issues, trends, opportunities, or concerns that your unit has or is responding to:

The continued global pandemic is International Marketing Team on libraries and librarians worldwide and their ability to sustain ALA memberships, pay for conferences, professional development, books, and subscriptions.

Annual Conference

To encourage ALA international members to attend this year's Annual Conference, working with President Jefferson to create personal promotional message to ALA international members.

International Marketing Team

IRO is reconstituting the International Marketing Team as one of the recognized Cross-Unit Teams. This is the first step in new collaborative strategies and efforts to increase international members and revenue for ALA. The first meeting will take place on March 29. One of the first efforts, which is just starting, is to pull together from IMIS and other association sources all the current and lapsed international members, customers, contacts to create an integrated data set.

Sharjah International Library Conference

IRO staff will join Executive Director Hall at a meeting on March 30th with partners from the Sharjah International Book Fair and Combined Book Exhibit to discuss the 8th Sharjah International Library Conference which will be held in November. The Conference will return as an in-person professional development opportunity, but plans are to maintain a virtual component to expand attendees and exhibitors which should provide additional revenue. Meeting will also discuss potential future collaborations.

ALA IFLA Participation

IRO staff has been coordinating the effort to get ALA members as candidates for IFLA leadership and committees. ALA Past Presidents will be running for IFLA President-elect and IFLA Governing Board. IRO is assisting in their nomination and candidacy efforts. IFLA elections will be in April and May and held electronically for the first time. IRO is working with IRO and other associations in U.S. and Canada to create a

slate of candidates for the new North America Division Committee. The IRO Director will continue as a member of the IFLA Governing Board through August.

UN Sustainable Development Goals

IRO is continuing to work with the ALA Task Force on UN Sustainable Development Goals and engaging the U.S. library community. IRO has also connected with UN Publishing which coordinates the [SDG Book Club](#) to expand its reach to young adults.

Member and Stakeholder Reach:

- 445 members and non-members

This quarter 445 members and non-members from 61 countries registered for the IFLA/ALA Webinar ‘*Open Access and libraries: Lessons from COVID-19 and our path towards the future*’ (111 attended live). Thousands of international libraries were reached via various messages sent about ALA conferences and programs through IFLA listserv.

Future Activities and Events:

IRO is working with IRRT on following webinar to be held in April/May (TBD):

- *Stories about the Zaatari Libraries during the COVID-19 Pandemic*
Presenter: Karen Fisher of Zaatari Camp Librarians

The Zaatari Camp was established in 2012, when a few refugees crossed the border into Jordan’s desert to seek refuge from the Syrian Civil War. Now the camp is where about 76,000 Syrians live, work, and pray, and where camp residents have access to 32 schools, five playgrounds, 58 community centers, and 12 libraries. This presentation will focus on life in the camp before and during the pandemic, and the role of the libraries. (Reference: American Libraries: <https://americanlibrariesmagazine.org/2020/07/01/bringing-books-desert-zaatari-refugee-library/>).

After not having any international focused program during last year’s Virtual Event, IRO will assist IRC, IRRT and others on these eight programs:

- African Libraries Resources: Access and Equity During Covid-19
- Asia and Oceania Libraries: Rewriting the Future of Libraries
- Central American Library Successes in the Face of a Humanitarian Crisis
- Leaning International: Stories from the Field
- Libraries as Social Change Engines Around the World
- Libraries Helping communities Achieve Development through the United Nations Sustainable Development Goals
- New Arab Authors: Great Reads to Diversify Your Collection
- Strengthening Societies: Libraries as Critical Institutions in Helping Communities Manage Change

INFORMATION TECHNOLOGY

Unit Manager:	Sherri Vanyek
Budget:	\$3,162,709
# of Staff:	7

Impact Streams Supported: Conference Services, Continuing Education. Contributed Revenue, Membership, Publishing.

Update on Pivot Strategy work and aligned unit goals:

FY21 IT Goal #1 - Upgrade Shibboleth (Single Sign-On software) to the latest version

Deliverables:

- Remove blocker on turning https on the main ala.org website servers
- Work with Continuing Education vendor to add Single Sign-on
- Work with the Election vendor to add Single Sign-on
- Work with Booklist vendor to add Single Sign-on
- Remove a blocker from the iMIS upgrade project

Status: The eCommerce websites are already https. In order for the two main ala.org websites to be configured for https we need work to be performed by Shibboleth consultants. Our Shibboleth consultants recommended we upgrade to the latest version of Shibboleth before turning on https on the two main ala.org websites. In order to do the upgrade, the consultants need to write a custom login module to work with the iMIS membership database. This new login module is necessary so that members and customers won't have to reenter known profile data in our various website systems. The new login module will also provide member discounts in our various ecommerce website systems and determine membership access to some of our website systems like ALA Connect. The consultants chatted with the Shibboleth founder for alternatives to creating a new login module but found no other options available.

This upgrade affects many systems and member touch points since it impacts the single sign-on logins. The single logins pull iMIS membership profile data into the applications for fourteen websites including the membership dues ecommerce website, donation ecommerce website, eStore ecommerce website, Compusystems ecommerce registration websites, Experient ecommerce registration website, JobLIST ecommerce website, two main ala.org websites, ALA Connect website, conference abstracts website, online journals websites, Digitell recordings website, ALA OCLC website, ALA institutional archives repository website, and almost as many development server test websites. All these sites must be tested with the new version of Shibboleth prior to going live in our production environment and turning https on.

The current estimate for completion of this upgrade is end of May 2021. We are actively recruiting for a staff position to support Shibboleth going forward. Our progress has also been affected by October, December, and March furloughs and spring vacation schedules with staff and consultants.

FY21 IT Goal #2 - Install https on the main ala.org website servers

Description: Turn on https on the two main ala.org websites

Deliverables:

- Implement new caching software to support https
- Configure and test

Status: This goal is dependent on the Shibboleth upgrade in Goal 1 above.

FY21 IT Goals #3 - Monitor revenue and membership goals

Description: Build dashboards to monitor the two major Association-wide goals in the Pivot Plan and associated key performance indicators.

Deliverables:

- Identify baseline dates and numbers
- Create dashboards to be able to monitor progress

Status: A number of Business Intelligence data dashboards have been defined and developed working with the Membership department in Power BI. The next step is to define and develop more dashboards to be rolled out across the association to monitor unit specific goals as well as those articulated by the Pivot strategy. Data dashboards will help units track trends and modify strategies in real time to improve revenue. This project will be completed by the end of the fiscal year.

FY21 IT Goal #4 - Assist with new Continuing Education (CE) Learning Management/eCommerce System Implementation

Description: Implement and integrate a new CE Learning Management/eCommerce System in conjunction with a cross-functional team.

Deliverables:

- Assist with the selection of a new system
- Assist with the implementation
- Set up and test integrations
- Provide training

Status: A vendor has been selected. This project will be rolled out in June 2021.

FY21 IT Goal #5 - Implement the eStore/eCommerce integration to the new fulfillment vendor

Description: Work with the new fulfillment vendor to set up the integration to the eStore/eCommerce System

Deliverables:

- Fulfillment vendor is able to process orders from the eStore/eCommerce system

Status: A vendor has been selected and the contract is being negotiated. This project will be rolled out in May/June 2021.

FY21 IT Goal #6 - Update Technology to Advance Membership Communications

Description: Improve Membership communications by updating the technology

Deliverables:

- Complete Blogs Migration to the Cloud
- Complete the Sympa Migration to ALA Connect
- Complete Informz (Marketing Automation Service) email marketing account merger

Status: These project deliverables are currently underway. The projects are scheduled to be completed in the summer/fall of 2021.

Member and Stakeholder Reach:

IT supports the association technology goals for all units, which contributes to increasing member engagement across the organization. IT manages many systems, including the ALA Connect platform which provides a platform for committee work and professional networking, a Zoom enterprise account for meetings and webinars held with members and customers across the organization, the Microsoft O365 applications used for staff, member, and customer communications, over 100 WordPress blogs used for member work and communications, and many other platforms used for engagement.

MEMBER RELATIONS AND SERVICES

Unit Manager: Melissa Walling
Budget: \$689,386
of Staff: 7
Impact Stream Supported: Membership

Update on Pivot Strategy work and aligned unit goals:

FY21 Goals - The MRS unit is working toward three goals that support the pivot strategy

- Increase membership to 56,000
- Increase student membership to 9,000
- Increase ALA membership in coordination with ALA Chapters and National Associations of Librarians of Color

Membership has remained at a decline when compared to previous years and we have not had much progress towards these goals. The current team is not yet staffed at a level that allows a robust focus on recruitment or other growth priorities or partnerships just yet. MRS has instead been focused on foundational activities that will prepare us for growth such as the membership onboarding project, ensuring our members have functioning dues receipts, and updating our membership renewal communications. While these projects are not making an impact yet on increasing our numbers, they are preparing us for growth with the additional staff we are bringing to the unit.

Describe the major issues, trends, opportunities, or concerns that your unit has or is responding to:

The MRS unit has been focused on four areas this quarter:

- **Membership Renewals:** Our membership renewal process remains a focus area. We mail three print renewals to our members which are not attractive or engaging. This fall, we activated a new print renewal piece, a postcard, which is focused on answering WIIFM (What's In It For Me) and is an attractive and engaging piece. We also began work on creating an infographic to be included with our membership invoice which will demonstrate the value of membership to the individual, and the impact of the membership dollars on the work of ALA. Since the print renewal is our opportunity to remind members of the value of their membership, it is important that we tell that story in a compelling and clear manner.
- **Membership Engagement:** A virtual Midwinter created an opportunity for our unit to host virtual member meet ups. The Committee on Membership hosted an all member meet up; the Student Chapters hosted a student member meet up; and we were involved with NMRT's conference orientation. These were successful and the lessons learned will help us build future virtual networking events as part of conferences, membership orientations and National Library Week celebrations. In addition, our unit has continued to focus on supporting the ALA Connect Live monthly events and will continue to support those in the coming year under President-Elect Wong's leadership.
- **Membership Onboarding:** An exciting project we continued to work on this quarter is the membership onboarding project. In conjunction with CMO, we expect to launch the program Summer 2021. As noted in the annual Marketing General Membership Marketing Benchmarking Report, "78% of

associations that have seen a renewal rate increase in the past year have also had a tactical plan to increase engagement.” Without a successful onboarding strategy for new members, it is difficult to secure a members’ affinity for the organization and ensure a membership renewal. This work is being done through an investment by OverDrive.

- **Membership Staffing:** MRS is an area of the organization that has been impacted by the hiring freeze; however, we are so appreciative that we were included in the Mellon Grant. We are working to hire two additional positions for our unit including a Membership Marketing & Engagement Manager as well as a Membership AR Specialist. Selecting talented staff to join our team will be so pivotal for our success and to our achievement of the FY22 goals.

Member and Stakeholder Reach:

ALA’s membership has dropped just below 52,000 - a 12% decline from 2020 and a 10% decline when compared to the same time in 2019. We had been tracking closer to 7-9% decline and our membership took an additional decrease this month due to timing delays in processing United group memberships (which are received at HQ). This impacted our counts by 1,221 members in addition to the expected decline due to the impact of COVID-19 on library employment.

Division memberships currently total 42,123 which is a slight decrease from last month and mostly due to processing delays with group memberships through United. These checks have been received and are expected to be processed before next month’s counts are distributed.

Round table memberships currently total 18,437 which is an increase when compared to February 2020. We have continued to see these gradual increases in round table membership over time.

At the ALA level, our Regular and Student memberships decreased since January which would have contributed towards the slight decreases that is seen across divisions. In addition, our renewal activity decreased which we would expect to see as we move out of our busy season.

Select Future Activities and Events:

Most of the projects listed above remain priorities for our unit through this entire fiscal year. In addition to those, we are focusing on the membership model work, activating the ReMember Fund, and reviewing our corporate and organizational membership structures.

Here are some highlights of these projects:

- The Committee on Membership is continuing to review our membership model with the goal of presenting the board with a final proposal this fall. The Committee is currently reviewing pricing so that we can do some pilot testing this summer on the prices and that will inform our final proposal to the board and ultimately to Council and to membership.
- At the March 16th meeting, ALA’s board approved the establishment of the ReMember Fund. This fund is designed to support members who are experiencing financial insecurity to support the payment of their basic ALA dues. The announcement regarding this fund will be made to members during National Library Week and will request donations to the fund be made prior to April 30th.
- The membership model work to date has focused on personal members, and we are reviewing some opportunities to streamline the organizational and corporate membership structure and benefits. This will include United for Library members as well which currently have a different structure in our database which causes some processes to be automated.

OFFICE FOR ACCREDITATION

Unit Manager: Karen L. O'Brien
Budget: \$227,073
of Staff: 2
Impact Stream Supported: Membership

Update on Pivot Strategy work and aligned unit goals:

FY21/FY22 Membership and Continuing Education Goals

- Ensure manageable expansion of available and affordable ALA-accredited degree programs

Progress: Managing Middle Tennessee State Candidacy application process and the comprehensive reviews of the Candidate programs at Old Dominion and University College London (UK).

- Report trends and statistical data including enrollment, completions, and student diversity in support of ALA's goals in the areas of continuing education and membership in FY22.

Progress: Published report and collecting latest data for Committee on Accreditation inspection at its April meeting before updating the report.

- Increase annual fee by 5% in FY22 to support ALA's goals of managing expenses and increasing overall revenue.

Progress: Complete

- Revise standards to reflect the state of the expanding field, ALA's core values, and the urgency to broaden equity, diversity, and inclusion in LIS education and libraries by FY22.

Progress: The Committee on Accreditation Subcommittee on Standards Review has developed a Standards review plan. Working in collaboration with the ALA Council Committee on Education on its revision of the ALA Core Competencies.

Trends and Issues/Opportunities and Threats:

Rising ideas, practices, conditions for unit and constituencies:

1. Continuing to investigate various secure WWW portals to streamline program reporting and for reviewers and the Committee on Accreditation (CoA). New approaches from EdVera and Rcampus look promising, although very labor-intensive to implement.
2. The Accreditation Working Group is making good progress with its analysis.
3. Most programs accepted CoA offer to shift next review visit forward one year due to pandemic disruptions, which has freed up CoA's docket for Standards revision.

Member and Stakeholder Reached during quarter:

- 218 members/stakeholders reached through direct engagement
- Additional members/stakeholders reached through semiannual Prism newsletter.

Activities:

- Review of performance data & narrative reports from the 67 ALA-accredited programs and the 3 programs seeking Initial accreditation status.
- Spring edition of Prism to be published April 15.

- Spring CoA Meeting April 22 responding to each program’s statistical reporting (http://www.ala.org/educationcareers/sites/ala.org.educationcareers/files/content/AP3/4thedition/AP3_4th_ed_l.18_current.pdf) Special Reports, and Biennial Narrative Reports.
- Conduct advanced reviewer training March 25 to prepare chairs for leading external panels.

OFFICE FOR DIVERSITY, LITERACY AND OUTREACH SERVICES

Unit Manager: Kristin Lahurd
Budget: \$415,646
of Staff: 5
Revenue Streams Supported: Conference Services, Continuing Education. Contributed Revenue, Membership.

Update on Pivot Strategy work and aligned unit goals:

ODLOS set several pivot strategy-aligned goals including:

FY21/22 Membership Goal - Support ALA goal of increasing racial and ethnic diversity in its membership and the broader field by overseeing the first wide-scale study of the impact of race on LIS workforce retention

ODLOS has examined methodologies and partnerships from other industries (namely nursing and social work) to guide the creation of a National Advisory Committee and the selection of consultants for the study. In addition, ALA, and the National Associations of Librarians of Color (NALCos) have been meeting quarterly; the NALCos are involved in the groundwork for the study and will have representation on the Advisory Committee.

FY21/22 Continuing Education Goal - Strengthen ALA position as a leading provider of Continuing Education on equity, diversity, and inclusion in FY22.

In working toward this goal, we have started to identify key impact stories from the trainings our Office facilitates and avenues to share those stories. The first of these will be a blog post by a faculty member at the University of Tennessee - Chattanooga on the work of their library following equity, diversity and inclusion trainings facilitated by ODLOS staff. As we engage our interest groups in the development of new Continuing Education content areas, we have laid the groundwork through several efforts. We hosted a virtual meet-and-greet in December to explore opportunities for collaboration and share avenues for continuing education contributions. At Midwinter 2021, the Library Services to the Justice-Involved (LSJI) interest group, formerly Library Services to the Incarcerated and Detained, hosted a discussion group and are initiating the process toward creating new Correctional Library Standards.

Describe the major issues, trends, opportunities, or concerns that your unit has or is responding to:

During this second fiscal quarter, our Office continues to respond to the significant and interrelated issues of racial justice and the diversification of the library profession. At the same time, we are responding to additional developing issues and opportunities, particularly through our internal and external partnerships.

In January, in coordination with ALA President Julius C. Jefferson, Jr., ALA staff responded to the decision by the Lafayette (LA) Public Library Board of Control to decline a grant the library received to explore the history of voting rights and voter suppression. The Board [rejected the grant and program](#) organized by the library on the grounds that the chosen subject experts were “extremely far left” and would not present “both sides.” Staff of ALA’s Office for Intellectual Freedom, Office for Diversity, Literacy and Outreach Services, Public Policy and Advocacy Office, and United for Libraries together drafted a letter to the Library Board and signed by ALA

President Julius C. Jefferson, Jr., and United for Libraries President David Paige, urging them to reinstate the conversations on the history of voting rights. This is just one instance of a joint effort in response to ongoing issues at the intersection of intellectual freedom and social justice. It is, therefore, especially timely that multiple groups are engaged across the Association around this intersection -- surfacing the challenges and dynamics therein and working toward a shared language. Our office is involved in all of these efforts. The Committee on Professional Ethics Working Group on Social and Racial Justice is developing a ninth principle for the Code of Ethics on advancing racial and social justice. The Freedom to Read Foundation Task Force on Intellectual Freedom and Social Justice is exploring the complexities at the intersection of intellectual freedom and social justice and creating an action plan. Finally, the Intellectual Freedom Social Justice Working Group, convened by Martin Garnar under the leadership of ALA President Julius C. Jefferson, Jr. includes representation from various ALA member groups and National Associations of Librarians of Color. The group is developing guidance on how to talk about the intersections of social justice and intellectual freedom and exploring webinars to discuss the issues.

In February, through a partnership with the Association for Rural and Small Libraries (ARSL) and the Association of Bookmobile and Outreach Services (ABOS), we launched the rebranded [National Library Outreach Day](#), formerly National Bookmobile Day. In light of the invaluable role libraries have played in response to the COVID-19 pandemic, the Office and our affiliate partners were compelled to recognize and celebrate all outreach efforts, including and beyond outreach vehicles. National Library Outreach Day will be celebrated on Wednesday, April 7, and presents an advocacy opportunity, including showing support by thanking library staff, writing a letter or e-mail to their libraries, or voicing support to community leaders.

Member and Stakeholder Reach:

Total: 9,188 (Members = 5,104; Non-members = 4,084). (Note that there may be some overlap across groups, as this includes committees and round tables, for example.)

In the second quarter of FY21, ODLOS expanded our reach to ALA members and beyond, primarily through equity, diversity, and inclusion (EDI) trainings and Midwinter programming.

- Kristin Lahurd, ODLOS Interim Director, and Mariel Colbert, CRO Program Officer, facilitated eight virtual EDI trainings for approximately 500 participants across three groups: Space Science Institute's NASA @ your Library team, the State Library of North Carolina, and San Mateo County Libraries.
- In January, Spectrum announced [20 additional scholarships](#) funded by an anonymous donation. As part of the Community Catalysts project category of the Laura Bush 21st Century Librarian Program, ODLOS was invited to submit a full proposal to fund Doctoral Fellowships and support a cohort of future LIS faculty committed to fostering racial equity through teaching and research.
- Highlights from the Midwinter Virtual Meeting include:
 - An experiential learning session on microaggressions in libraries, envisioned and sponsored by ALA President Julius C. Jefferson, Jr. and coordinated by ODLOS. This live session included a presentation on microaggressions by Alanna Aiko Moore and scenario-based breakout conversations facilitated by member leaders.
 - With a theme of "The Other America," the prerecorded 22nd Annual Dr. Martin Luther King, Jr. Holiday Observance and Sunrise Celebration featured a keynote address by Dr. V.P. Franklin, a Call to Action by Dr. Carla Hayden and a moving rendition of "[Lift Ev'ry Voice and Sing](#)" by the Stanford Talisman Alumni Virtual Choir. The event had 1,200 attendees and was covered by [American Libraries](#).

Future Activities and Events Through End of Next Fiscal Quarter:

- In partnership with the Association of Bookmobile and Outreach Services and the Association for Rural and Small Libraries, ALA will celebrate the first ever [National Library Outreach Day](#) on April 7.
- We have several trainings scheduled for the next fiscal quarter, including two series of *EDIcon: Foundations of Equity, Diversity, and Inclusion*, first for the school librarians within the Boards of Cooperative Educational Services in New York and then as part of the Utah Library Association / Mountain Plains Library Association virtual conference in May. We will also be facilitating an *EDI Elements* training series for Dorchester County Public Library and the session *Uncovering Privilege and Addressing Microaggressions* for the Whatcom County Library System.
- Along with a representative group of ALA staff, the ODLOS team will participate in an EDI Charrette to identify EDI priorities and opportunities within the Association and the profession and to inform the creation of a cross-functional team.
- On May 25-26, ALA's Rural, Native and Tribal Libraries of All Kinds Committee will host a summit to explore the challenges and opportunities that rural libraries are facing. The summit will include discussions related to funding, responses to COVID-19, and opportunities to network.
- The application for the 2021-2022 Spectrum Scholarships closed on March 1, 2021 and a jury of 20 individuals will begin review.

OFFICE FOR INTELLECTUAL FREEDOM

Unit Manager: Deborah Caldwell-Stone

Budget: \$434,504

of Staff: 4

Impact Streams Supported: Continuing Education, Contributed Revenue, Membership, Publishing

Update on Pivot Strategy work and aligned unit goals:

OIF's unit goals in support of the five-year pivot strategy center on fostering support for member recruitment and retention by creating new opportunities for member engagement and by demonstrating the value of membership for those who are not yet association members. These goals look to expanded continuing education opportunities and new and innovative services for those who engage with the office for support and assistance.

During this quarter, OIF has made initial progress towards its goal of expanding its continuing education offerings for members and for those working in libraries. OIF staff met with representatives of ALA's publishing and online learning units in March 2021 to discuss viable topics for professional development and continuing education coursework, and to plan new webinars and online learning opportunities that will augment existing OIF e-courses. There is now a proposal for a new Fall 2021 webinar discussing how to conduct privacy audits. In addition, OIF staff is working closely with ALA E-learning to renew two multi-week online courses on First Amendment and privacy law that have been offered in the past by OIF and ALA E-learning.

OIF plans to initiate work on its remaining unit goals during the third quarter of FY21.

Opportunities and Challenges – Dr. Seuss

On March 2, the entity that controls Theodor Geisel's estate announced that it would cease publishing six of the author's books that include offensive depictions of Asian and Black persons. Describing the illustrations as "hurtful and wrong," the entity's board said it wanted to ensure that its catalog "represents and supports all communities and families." The announcement provoked immediate public reaction that ranged from

congratulations and praise for addressing racism in children's literature to condemnation for participating in "cancel culture" and book banning.

OIF and CMO both received requests for information and comment, providing an unanticipated opportunity to amplify ALA's messaging and highlight its initiatives in support of intellectual freedom and social justice. But it also represented a challenge: how respond with messaging that upholds both intellectual freedom and the importance of addressing racism in children's literature. OIF worked collaboratively with CMO, State and Local Advocacy, and the youth divisions to craft talking points that achieved these goals.

The talking points emphasized that the decision was a private action that was not a call to remove books from libraries and that libraries should make any decision concerning the status of the books pursuant to written policy. Our messaging also acknowledged the racist content of the books, promoted the importance of expanding children's collections to include diverse voices, and encouraged thoughtful conversation between library workers and their communities and parents and their children about racism and racial justice. Over a week-long period, OIF staff shared this messaging via several major media opportunities, including streamed and televised appearances on CNN and local PBS station WTTW. The messaging was also shared with members and chapter leaders who wished to offer positive talking points to their communities.

OIF also tracked how libraries responded to the announcement withdrawing the six Dr. Seuss books from publication. Many libraries announced that they would allow the books to remain on the shelf but would make no attempt to replace them when they became eligible for weeding under their policies. Other libraries shifted the books to research collections, placed them on reserve, or placed them under review. A number of libraries removed the books entirely. OIF staff continued to encourage libraries to follow their collection development policies while acquiring and promoting books by BIPOC authors or reflecting the experience of BIPOC persons.

While addressing these events presented an unanticipated challenge to OIF staff time and resources, it also provided an opportunity to demonstrate how we can re-frame our messaging, advocacy, and counsel to demonstrate how intellectual freedom and social justice are complementary and interdependent principles that provide a strong foundation for the work we do.

Opportunities and Challenges – State Legislation

On January 1, each of the 50 states began to convene their elected representatives for the 2021 legislative session which is still underway in most states. As noted in earlier reports, this year has been particularly challenging for a number of state chapters who are addressing adverse model bills related to filtering technologies, resource platforms, and the elimination of "harmful to minors" exemptions for public and school librarians. OIF is working with PPA to assist a number of states in these efforts. A joint confidential report from PPA and OIF will detail these initiatives.

Member and Stakeholder Reach:

- ALA Connect Outreach: 45,527
- Informz Newsletters (IF News): 25,451
- Intellectual Freedom Blog: 850 subscribers; total views: 76,462
- Committees, Roundtable, and Working Group Meetings: 480 members
- Challenge Support: 107 emails and phone calls
- Other inquiries and policy support: 19 emails and phone calls
- Intellectual Freedom Blog: 850 subscribers; total views: 76,462

Intellectual Freedom Round Table (IFRT)

- Frosty Windows, Frosty Mirrors Webinar: 417 Registrations, 250 Attendees

- Student Member Recruitment Initiative: 366 Requests, 178 New Members
- 3/8 Election Happy Hour: 22 Attendees.

Public Challenges (1/1/21 – 3/24/21)

- 85 Cases
- 60 Books, 5 Programs, 3 First Amendment Audits, 2 DVDs, 2 Displays
- 8 Cases specifically addressing Dr. Seuss books
- Notable Challenges
 - *Call Me Max* by Kyle Lukoff. Eanes ISD in Texas.
 - Equity Book Bundles. Murray City School District in Utah
 - *The Absolutely True Diary of a Part-Time Indian*. Hastings on Hudson in New York.
 - *To Kill a Mockingbird*, *The Adventures of Huckleberry Finn*, *Of Mice and Men*. Williams S Hart Union High School in California.

Social Media

- Tweets from the Office for Intellectual Freedom and Choose Privacy Every Day profiles garnered 140,360 impressions (1.5% decrease), 1,840 engagements (35% decrease) and 535 post link clicks (30% increase). The platforms attracted 115 new followers. The most engaging tweet was an interview with OIF Director Deborah Caldwell-Stone about libraries addressing Dr. Seuss books through their policies.
- Posts from the Office for Intellectual Freedom, Choose Privacy Every Day and Banned Books Week Facebook profiles garnered 96,620 impressions (44% decrease), 6,320 engagements (44% decrease) and 1,333 post link clicks (42% decrease). The pages' following decreased by 250. The most engaging post was a feature on a newly opened banned books museum.

Webinar

- "Practical Answers for Evolving Issues: Introducing the 10th Edition of the Intellectual Freedom Manual," an ALA Virtual Midwinter News You Can Use session, drew 120 attendees. 72 persons attended the subsequent live Q & A session featuring editors Martin Garnar and Trina Magi and several of the contributors to the Intellectual Freedom Manual.

OIF worked with United for Libraries to draft a letter expressing deep concern about the Lafayette Public Library Board of Control's decision to refuse a grant from the Louisiana Endowment for the Humanities. The grant would have funded the creation of a program on the history of voting rights led by highly regarded scholars and authors knowledgeable about the history of voter suppression. ALA President Julius C. Jefferson, Jr. and ULA President David Paige signed the letter, which was sent to the Board of Control and shared with local news media.

Future Activities and Events

National Library Week

- On April 5, OIF will announce the top ten most frequently challenged books for 2020 as part of the State of America's Libraries Report. OIF and ALA Graphics will also debut this year's Banned Books Week theme and associated products. The theme for Banned Books Week 2021 is "Books Unite Us, Censorship Divides Us."
- On April 9, OIF will be hosting a town hall with several of the authors of 2020's most frequently challenged and banned books.

PUBLIC POLICY AND ADVOCACY

Unit Manager: Kathi Kromer
Budget: \$2,572,405

of Staff: 15 FTE, 3 part-time
Impact Streams Supported: Membership; Contributed Revenue

Update on Pivot Strategy work and aligned unit goals:

The Public Policy and Advocacy office (PPA) contributes to ALA's membership goal. The unprecedented opportunities with direct and indirect funding for libraries included in the American Rescue Plan Act of 2021 resulted in ALA members tweeting that they had never been prouder to be an ALA member. While the funding doesn't come directly to ALA, it will have a have indirect effect as libraries will be able to keep staff on the payroll and have funding available to support professional development by attending ALA paid events.

Also, in alignment with the ALA pivot strategy for increasing meaningful membership engagement opportunities, PPA has created new resources, provided professional development opportunities and expanded communication with ALA members and divisions to broaden advocate skills.

Emergent Trends and Issues/Opportunities and Threats:

As expected, there is a high pace of activity from the Biden-Harris Administration and the 117th Congress. Despite unprecedented gains for libraries (see most impactful unit activities), it has been very challenging to get bipartisan support for library public policy priorities due to the high level of partisanship that comes with such thin margins in Congress. ALA has also seen an increase in state-level legislation, including model bills gaining momentum. ALA will need to work even closer with Chapters to share best practices and intelligence as these model bills will not be going away.

PPA focused a majority of our resources on making sure libraries were best positioned for every opportunity in the American Rescue Plan Act (ARPA). While that effort paid off in a historic way for the library community, it came at an internal cost. Our capacity was over-extended; the PPA team could not address other issues, including new topics not on our priority list being raised by members. The reduction of resources in ALA's FY 21 budget and the extra hours put in by the PPA team have contributed to burnout just 12 weeks into the new legislative cycle.

Perceived competitors in the library advocacy field are aware that ALA's financial challenges make the Association vulnerable. Because they aren't facing the same challenges, they have been able to hire staff and extend their reach in the advocacy arena. The credibility of the library community – forged through years of ALA policy expertise and relationships PPA has cultivated with coalition partners over 75 years in Washington – is at risk of being undermined by competition.

PPA will continue to work with our member committees as we adapt and adjust to the current environment and will continue to look for and seek opportunities to advance ALA's public policy priorities in this new legislative climate.

Member and Stakeholder Reach

PPA continues to reach a large amount of internal and external stakeholders, including:

- ALA members and leaders, reached via
 - Exclusive video interview with ALA President Julius C. Jefferson, Jr., and Sen. Jack Reed (RI) at Midwinter
 - Midwinter events featuring congressional staff and DC-based policy experts
 - AL Call Number podcast featuring PPA interview with Rep. Andy Levin (MI-9)
 - Scores of posts on PPA, ALA and ALA division (incl. AASL, ACRL, PLA, UFL) social media accounts and blogs

- An appeal immediately following announcement of ARPA gains (partnership with Development)
- Monthly presentations in ALA Connect Live
- Workshop presentations on communications to COLA, Libraries Build Business cohort, Policy Corps,
- Library advocates (distinct from ALA members) via emails to through ALA's advocacy center
- Multiple press releases and media interviews with library trade and other media Members of Congress, including letters and endorsements of legislation published by congressional staff
- Coalition partners, including Tribal Library Summit

Activities:

Libraries receive record funding in 2021 spending bill: Thanks to the tireless efforts of PPA staff working closely with chapters and key advocates in target districts for the past year, the largest spending bill ever approved by Congress, the \$1.9 trillion-dollar American Rescue Plan Act (ARPA), included unprecedented levels of direct and indirect funding for libraries. PPA staff worked tirelessly for months to make these funding streams become a reality.

IMLS: ARPA included \$200 million for libraries through the Institute of Museum and Library Services (IMLS). Of the \$200 million for IMLS, 89 percent (\$178 million) is allocated for state library administrative agencies (using the Grants to States formula after a \$2 million state minimum and \$200,000 minimum for territories).

Local governments: ARPA provides billions of dollars in library-eligible funding, with more than \$360 billion going to state, local and tribal governments. To receive library-eligible funding outside of IMLS, ALA members must advocate at the state and local level. States and local governments will decide how to spend their piece of the \$360 billion pie. The best way to secure funding outside IMLS will be to partner with local governments, school administrators, and other community service organizations. ALA is exploring opportunities for libraries to leverage state and local ARPA resources and will provide guidance to chapters next week on how to tap into federal funds.

Broadband: ARPA also provided more than \$7 billion for libraries and schools to purchase and distribute technology necessary for remote learning, working from home, virtual healthcare visits and more. The bill calls for an Emergency Education Connectivity Fund through the FCC's E-rate program. Participating libraries will receive 100% reimbursement for the cost of hotspots and other Wi-Fi-capable devices such as modems, routers, laptops, and tablets. The connectivity fund is a brand new program, and ALA is providing input during the rulemaking process, which must be developed by the FCC within 60 days of the bill's passage. Another program funded through ARPA aimed at addressing the digital divide, the Emergency Broadband Benefit Program, provides subsidies to low-income households for internet connectivity and devices. PPA submitted comments to the FCC to highlight how libraries provide the public with resources and outreach materials and could help connect eligible patrons to the new program. ALA's comments also requested the FCC provide support materials for libraries and other community organizations so that staff are prepared to provide the best information when the program is implemented.

Library champions in the House, Senate introduce Build America's Libraries Act: The Build America's Libraries Act was introduced on January 28, 2021 in the Senate by Sen. Jack Reed (D-RI), along with Sens. Bernie Sanders (I-VT), Sheldon Whitehouse (D-RI), and Ron Wyden (D-OR), and on March 3, 2021 in the House by Rep. Andy Levin (D-MI-9) and Rep. Don Young (R-AK-AL). The bill would fund upgrades to the nation's library infrastructure to address challenges such as natural disasters, COVID-19, broadband capacity, environmental hazards, and accessibility barriers. This groundbreaking legislation would pave the way for new and improved library facilities in underserved communities across the country. Funding would be distributed through IMLS to state library agencies, which would then award grants on a competitive basis to libraries in each state. Funding

would be prioritized to libraries serving marginalized communities, such as high-poverty areas. Additionally, IMLS would provide funding directly to Tribal libraries.

Future Activities:

- ALA kicks off our annual #FundLibraries campaign with release of President Biden’s FY 2022 budget proposal
- Dear Appropriations letter signing campaign
- Small April event for strategic group of grassroots advocates
- April 6 kickoff of webinar series on PLA/PPA Census data collaboration
- “Take Action for Libraries Day” during National Library Week, including interview with legendary journalist Dan Rather (in partnership with CMO, UFL and Booklist)
- Continuing to get support for including the Build America’s Library Act in an infrastructure package
- Highlighting 75th anniversary of PPA through social media posts

PUBLIC PROGRAMS OFFICE

Unit Manager: Deb Robertson
Budget: \$289,271
of Staff: 10 (8 of whom are supported by grant projects)
Impact Stream Supported: Contributed Revenue

Update on Pivot Strategy work and aligned unit goals:

FY21/22 Goal #1: Support ALA revenue goals in FY22 by developing new/strengthening existing strategies to monetize PPO's position as ALA's main grantmaking unit, convert PPO grant recipients and social media followers into paying ALA members with a special focus on recruitment from small and rural communities, disseminating PPO stories of impact from across the country as examples of ALA as a changemaker in the field, and turning PPO project advisor and peer reviewer recruitment into member benefits.

FY21/22 Goal #2: Increase PPO earned and grant revenue in FY22 by 10% by continued grant seeking efforts, launching a paid CE program, realizing earned revenue from book royalties supporting major gift, individual donor and campaign goals.

STATUS UPDATE: PPO is working with HR to re-organize staff following the recent departure of deputy director Lainie Castle, who left ALA after 20 years. The re-organization will allow PPO’s funder, partner and grantee relationships to move forward without disruption; enable us to meet all contractual obligations; and keep us on course to increase revenue by 10% (Goal #2). PPO’s manager team has incorporated the pivot strategy into our monthly meeting schedule so we can closely monitor our progress toward our goals. In response to Goal #1, PPO added ALA membership as a requirement for library workers who wish to serve as advisors for a project that will develop diverse financial literacy book list resources. We also added ALA membership as a requirement for PPO’s Peggy Barber Tribute Grant and Libraries Transform Communities Engagement Grant.

Describe the major issues, trends, opportunities, or concerns that your unit has or is responding to:

As the COVID vaccine rolls out and the country takes steps toward normalcy, library programming remains far from “normal.” Anecdotally, PPO is hearing that libraries remain skeptical about a return to in-person programming. Most are instead exploring “hybrid” programming models — involving some combination of in-person and virtual — for the foreseeable future.

Just as there was a phase of uncertainty and then innovation at the start of the pandemic, we are now seeing that dynamic play out again. By and large, libraries are considering many options as they weigh their next steps, and “hybrid” means different things to different libraries. For example, one library may attempt a model of in-person programming with a virtual component (e.g., an in-person book club that people can also join synchronously via Zoom) while others are planning to offer programs twice, once in person and once virtually, with some modifications. Questions loom around program staffing, marketing, and budgeting in this “new normal.” PPO staff is collaborating with the Public and Cultural Programming Advisory Committee (PCPAC) Adult Programming Subcommittee to create an editorial plan for our website, ProgrammingLibrarian.org, that will tackle some of the most-needed topics in the post-COVID programming re-entry.

Meanwhile, those PPO national programming initiatives that had been put on hold due to the pandemic — traveling exhibitions funded by the FINRA Foundation (Thinking Money for Kids) and the U.S. Holocaust Memorial Museum (Americans and the Holocaust) — are being rescheduled with full support from the partners and participating libraries. Both tours are expected to resume in fall 2021.

Member and Stakeholder Reach:

NOTE: Due to the federal funding model of many PPO projects, which necessitate that opportunities be open to all library workers and not just ALA members, it can be challenging to offer member statistics.

- 330 libraries applied for Round 2 of Libraries Transforming Communities: Focus on Small and Rural Libraries. All applicants were required to show membership in either ALA or the Association for Rural & Small Libraries (ARSL). PPO staff is meeting with the representative of the project’s private donor to solidify plans for distributing the remaining grant funds while covering staff salaries.
- 40 libraries applied for PPO’s inaugural Peggy Barber Tribute Grant, funded by contributions in honor of the former ALA employee; three grants of \$2,500 will be awarded. All applicants were required to have a current ALA membership.
- 33 libraries applied for PPO’s second annual Libraries Transform Communities Engagement Grant, made possible by former ALA president and longtime supporter Nancy Kranich; one \$2,000 grant will be awarded for a community engagement project on the theme of anti-racism. All applicants were required to have a current ALA membership.
- PPO’s ProgrammingLibrarian.org website had 29,160 unique users in January and 23,425 in February. This is up from 20,078 unique users in December 2020.
- Membership in the Programming Librarian Facebook group has grown to 19,945 members as of March 23. This is up from 18,876 on December 1, 2020.

Select Future Activities and Events:

- Oversee peer review, announce and onboard the libraries selected to participate in LTC: Focus on Small and Rural Libraries Round 2 grants; liaise with CMO to communicate their success stories to the field.
- Onboard the 16 libraries selected to be part of the American Dream Literacy Initiative, offered with the Dollar General Literacy Foundation.
- Working with the Public and Cultural Programming Advisory Committee (PCPAC), plan and host a series of morning social/coffee events during the 2021 Virtual Conference. Each event will give

attendees a chance to network and discuss programming topics. Use the event series as an opportunity to promote conference registration and ALA membership to the 20,000 members of PPO's Programming Librarian Facebook group.

- Continue our very popular IMLS-funded webinar series on media literacy programming for adults.
- Present the 2021 Sara Jaffarian School Library Program Award.
- Name advisors and commence work on The Project to Address Diversity and Inclusion in Library Personal Finance Collections and Program, a program that will develop a reading list that eschews stereotypes and embraces diversity in telling stories and sharing skills related to personal finance and financial capability for children.
- Continue plans to re-launch two traveling exhibition tours that had been paused due to COVID.

ALA PUBLISHING

(Includes: ALA Graphics, ALA Editions/ALA Neal Schuman, American Libraries, Booklist, eLearning Solutions, Digital Reference-RDA, Production Services)

Unit Manager: Mary Mackay
Budget: \$2,669,246 (Overhead)
of Staff: 52
Impact Stream Supported: Publishing

Update on Pivot Strategy work and aligned unit goals:

ALA Publishing's individual units are laying groundwork for the FY22 goals shared with all staff in March 2021, focusing currently both on striving to meet FY21 revenue goals while containing expenses, and also on ensuring that published content and initiatives support the imperative of increasing EDI engagement and amplifying "Let Our Legacy Be Justice." Key performance indicators for ALA Publishing units related to the Pivot Strategy will reflect what we have traditionally measured—revenue/ expenses/ overhead/ net revenue—with KPIs expanded in FY22 to measure more non-financial goals.

Emergent Trends, Issues and Opportunities:

The new ALA Pivot Strategy continues to offer a framework for rethinking aspects of ALA Publishing's work to help us respond to trends and market conditions. Despite some optimism about the coming months with vaccinations and more libraries and schools either opening up again or planning to do so, market and sales trends continue to be volatile and unpredictable. Based on manually compiled information from software used in each unit, it looks as though as of late February, we were tracking 7% behind revenue goals and anticipate that this may hold true for the fiscal year overall. Timing of turnaround in the market are still unclear, and higher Q3 and Q4 revenue targets account in part for a projected shortfall of 5-7%. Like our peers and competitors, we look for creative new opportunities to partner with advertisers and sponsors and ways to bundle offerings both in that area and in product and elearning sales.

The demand for content that supports library workers, LIS instructors, and organizations in making progress in EDI initiatives continues to grow. Units across ALA Publishing are responding to this imperative according to the type of product their units produce, and the specific markets served.

The high returns ratio from book distributors continued in Q2 but seems to be evening out at the start of Q3. Seeking a new vendor for product fulfillment, warehousing, and distribution will allow us to rethink distribution and think about how we can integrate future-facing models such as print-on-demand (already used for reprints and some smaller print runs).

New products and licensing opportunities without upfront investment in inventory or high fulfillment costs continue to grow for ALA Graphics. Licensing revenue and royalties from the virtual store show the potential impact of these models. High fulfillment costs for these products create very narrow margins, hence the investigation of licensing and on-demand models.

Library Journal and *Publishers Weekly* maintain their high profile in the sponsored webinar environment. *Booklist* is competitive in the readers' advisory and collection development space and partners with several publishers on related webinar events. Where ALA has an opportunity may be sponsored webinars that cover general library best practices, trends, and challenges. A user-friendly platform that can be shared across ALA units would support this effort.

Booklist and *American Libraries* in particular are focusing on how to provide digital engagement in place of face-to-face events, including more custom content and collaborative virtual opportunities such as Book Buzzes and AL Live. The magazines continue to focus on new digital sponsorship and advertising opportunities as they emerge, including podcast sponsorship.

Member and Stakeholder Reach

The magazines and elearning have more measurable direct engagement than products such as books, posters etc. One of our clearest measures of member/ non-member activity and engagement would be percentage of transactions with member discounts. A high percentage of our sales do not have linked member information because they go through distributors (Amazon, Baker & Taylor, EBSCO, etc.) that use proprietary ordering systems and don't share customer data. Some orders are placed by accounting/ administrative departments of institutions that may be ordering for members but don't use member numbers to apply for discounts.

Booklist Q2

- 7,555 print subscribers (-261 from Q1)
- 63 institutional digital subscriptions (+4 from Q1)
- 348,000 Booklist newsletter subscriptions (overlap—top single newsletter is around 101,000) (+15,526 from Q1)
- 4,699 active profiles, Booklist Online (-185 from Q1)
- 42,100 Twitter followers; Facebook 16,223; page followers, 14,602; YouTube channel subscribers 339 (+48 from Q1)
- 9,642 listens for 13 podcasts (FY21 YTD cumulative = 18,200 listens for 25 podcasts)
- 20,948 registrants for 14 webinars (FY21 YTD cumulative = 53,345 registrants for 35 webinars)

American Libraries and AL Direct Q2

- 47,284 recipients AL print (Jan/Feb and March/April) (-3,532 from Q1)
- 35,528 average recipients weekly AL Direct (-360 from Q1)
- 12,960 podcast listens (FY21 YTD cumulative = 26,427 listens)
- 91,189 Twitter followers (+1,924 from Q1); 17,302 Facebook page followers (+278 from Q1)

Digital Reference/RDA Q2

- 2,280 Toolkit subscribers (+ 42 from Q1)
- 9,773 users (+ 187 from Q1)
- 21,388 newsletter subscribers; 1,448 RDA-L email subscribers

eLearning Solutions

- Q2 505 registrants, 31 events
- FY21 YTD cumulative: 1,687 registrants, 61 events

ALA Graphics

- Q2: 2,461 orders, 9,989 products purchased, 60,000 printed catalogs mailed
- FY21 YTD cumulative: 3,429 orders, 15,795 products purchased, 60,000 printed catalogs mailed

ALA Editions/ ALA Neal Schuman

- Q2: 2,091 orders, 13,170 units purchased (after returns)
- FY21 YTD cumulative: 3,864 orders, 26,213 units purchased (after returns), 50,241 print catalogs mailed

ALA Store Q2

- 124,741 visits (+4,682 from Q1) Note: Unique visitor stats not available in Google Analytics
- 505,299 pageviews (17,991 just for The Child poster!)
- Users typically spend about 2 minutes per visit to the store
- 36% of users find the store via organic search; 35% of users find the store via direct links (in Q2, 5% of this 35%--about 2,800 users--were clicking direct links to The Child poster); 18% of users find the store via referrals from other sites (mostly ala.org); 8% of users find the store via social media

Activities

Booklist:

- Announced the Booklist mission statement, developed in collaboration with the new advisory board.
- Made the Booklist 2020 Starred Review issue free and open to all in December as a service to library workers and to all readers.
- Booklist editors were invited again to serve as nominators for the Library of Congress Prize for American Fiction. Their work as a nominator for the 2020 prize was described as “invaluable to our selection process.”
- Continued the work of the new Booklist advisory board <https://www.booklistonline.com/staff#advisory> and three new internal staff working groups, each including a Board member to help guide the team, focused on (1) EDI, (2) reviewer guidelines and training, and (3) subscriptions ideation.
- Collaborated with RUSA on the announcement of the winning titles for the 2021 Andrew Carnegie Medals for Excellence in Fiction and Nonfiction.

ALA Editions/ ALA Neal-Schuman:

- Published a total of 22 book projects in Q2, including 11 from our UK partner Facet/ CILIP Publishing. Cumulative total of books published YTD in FY21 is 35.
- The Society of American Archivists (SAA) selected for its 2020/2021 One Book, One Profession reading initiative [A Matter of Facts: The Value of Evidence in an Information Age by Laura Millar](#), the first book in the [Archival Futures Series](#) co-published by ALA and SAA.
- The [announcement of the new collaboration](#) with trade publisher Sourcebooks in February was picked up by several trade newsletters. The first title will be published in Q3, followed by a cluster of 3 products in late calendar 2021. ALA Editions will earn royalties on collaborative titles.

- Received positive feedback on free “extras” provided in a recently introduced program to encourage and support the use of ALA Neal-Schuman textbooks in LIS courses.

American Libraries:

- Continued planning for a new column featuring rotating columnists of color.
- Completed 37 posts covering the virtual Midwinter Meeting content, including speakers.
- Building on the 2021 media kit, promoted various packages for bundling different types of advertising to specific advertisers to try and increase average spend and commitment to advertising over time, and limit the number of one-off ads. (One vendor alone purchased \$54,000 in 2021 ads.)

Digital Reference, RDA:

- Completed the 3R Project with the December RDA Toolkit release. The successful December switchover brought RDA: Resource Description and Access into alignment with the IFLA Library Reference Model and the RDA Toolkit into compliance with current accessibility standards. This has been a multi-year global initiative.
- The introductory RDA Lab Series in collaboration with eLearning Solutions (see below).
- Implementation of a new licensing and permission policy to better protect copyright while potentially generating additional revenue.
- A proposal for a new optional customer service for RDA Toolkit subscribers.

eLearning Solutions:

- Entered into an agreement with WebCourseWorks to build and implement a new eLearning site that will serve as the catalog, learning management system, and store for all ALA eLearning events, both free and fee-based.
- Launched the new iteration of the RDA Labs series, which to date has generated over \$50,000 in revenue including an \$8,500 licensing agreement with the National Library of Greece.
- Established relationships with two new institutional customers—The Tampa Bay Library Consortium and the South Central Kansas Library System, who made initial bulk purchases totaling over \$11,000. Both of these customers are likely to become regular purchasers going forward.

ALA Graphics:

- Published 10 print products in Q2. Additionally, offered 5 new designs on 22 products in the virtual shop. Print-on-demand highlights include National Library Week “Welcome” items and products created through new partnerships with Core and ALA affiliate ABOS.
- Secured Marley Dias as Honorary Chair for Library Card Sign-up Month 2021 for CMO. Increased collaboration with CMO providing content for social media activities.
- Collaborated with CMO on promotion for the Baby Yoda poster (sold out within days) and bookmark packs, focusing on ilovelibraries.org as a channel to the general public. The REM band manager also reported selling through the REM READ poster puzzle.

Select Future Activities and Events:

- In Q3, all units in ALA Publishing will continue to focus on meeting product deadlines and on maximizing sales opportunities. In Q3, we expect to formulate more detailed and individual FY22 goals and to develop KPIs that reflect the Pivot Strategy priorities.
- Planning continues for centralizing aspects of ALA elearning that will result in Continuing Education becoming a new and separate unit of ALA as of September 2021, as part of the Pivot Strategy.
- Extensive staff time and attention must continue to be dedicated in Q3 and 4 to ensure a smooth transition to new vendor(s) for product fulfillment, warehousing, and distribution. The contract is under negotiation as of early Q3, and the transition will take place in Q4. A moving sale to help both

deplete inventory of books, posters, bookmarks, and other promotional items and to generate additional revenue before the move was initiated in Q3.

- Groundwork continues in Q3 for *Booklist's* new patron-facing product, set to launch (with input from the Booklist Advisory Board) as a digital-only product in early FY22. The goal is to include this product intended for all library patrons as a benefit of subscription, offering an added value proposition to help boost subscriptions while also expanding our reach to the public. Booklist received Mellon Foundation grant funding for the new product.
- In Q3, Graphics and ALSC are partnering to offer products in celebration of the 25th anniversary of Día (Children's Day/Book Day) on the Graphics' virtual store. Items are available in both English and Spanish and include posters, t-shirts, totes, and baby/kids clothing. Visit <http://bit.ly/alscdia25products>. ALA Graphics will mail its spring/summer catalog in Q3 launching Banned Books Week and other new materials. ALA Graphics has licensed a new design to Out of Print, due to launch in early April.

REPORTS OF ALA DIVISIONS

AMERICAN ASSOCIATION OF SCHOOL LIBRARIANS

Division Executive Director: Sylvia Knight Norton

Budget Amount: FY21 Q1: \$177,919

of Staff: 4

of Members: 5,969 (per informal membership statistics provided for February 2021)

Update on Pivot Strategy work and aligned unit goals:

AASL established two unit goals aligned with the Pivot Strategy related to membership and net revenue.

Pivot Strategy Aligned Unit Goal – Increase Membership

- Increase AASL membership total revenue for FY21/FY22 by \$200,000 over FY19/FY20 total membership revenue
- Membership dues for the first quarter as provided on the performance report were on track (actual \$69,500 vs budget \$69, 250)

Although the February 2021 informal membership statistics indicated a drop of 4.7%, the number of new personal membership for that month has increased which may be tied to the opening of registration for the 2021 AASL National Conference. A biennial conference contributes to the goal to increase membership as reflected in January and February numbers.

- January 2021: 157 new personal members compared to January 2020 with 89 paid new memberships. 2021 included 17 student members who paid ALA dues but were comped for AASL membership per a program connected to buying the AASL Standards from the ALA store.
- February 2021: 81 new personal members compared to 59 paid personal members in 2020. The 2021 memberships included 24 paid student memberships.

Pivot Strategy Aligned Unit Goal – Increase Revenue

Increase non-dues revenue by \$195,00 by while maintaining or decreasing expenses (compared to FY19/FY20)

- Q1 performance reports do not include revenue from agreement with ALA Editions for net revenues from the sales of *National School Library Standards* and related publications that are transferred in April and August.
- Registrations for the 2021 AASL National Conference in Salt Lake City are on track when compared with the 2019 conference in Louisville. All revenues and expenses for the October 2021 conference are deferred to FY22.

Describe the major issues, trends, opportunities, or concerns that your unit has or is responding to:

The projected job situation for school librarian positions is always an issue to follow. Since March 2021, AASL has gathered data through a series of 'snapshot' surveys to document and report on the work of school librarians and school libraries as schools closed, reopened, and operated in in-person, remote, or hybrid learning environments. The sixth and final survey closes on March 26. The data from school librarians, district supervisors, and educators of school librarians provides a picture of the integral role of the school librarian. These reports provide information for ongoing advocacy efforts. The superintendents and principals in the

AASL School Leader Collaborative continue to point to the leadership of school librarians as problem solvers and key to the social emotional learning challenges for teachers and students. AASL works with PPA to advocate for school libraries for ensuring school librarian positions remain as schools grapple with the impact of the pandemic.

AASL planning for speakers and events at the AASL National Conference to be held in Salt Lake City in October AASL reflects the AASL core values for inclusion. The conference is the major source of revenue for a two year period for AASL. The staff continue to monitor the vaccinations of teachers across the country as the trajectory for vaccination status and the re-opening of schools in September support the registration and attendance at an in-person conference in October. To reassure attendees, AASL is currently offering a no-risk registration and promoting the conference through targeted communications to librarians and vendors. AASL works closely with the convention center to ensure a safe and successful conference.

of Members: 5,969 per informal membership statistics provided for February 2021

Members, non-members, and stakeholders are reached regularly through a variety of communication vehicles that are sent directly to members who are encouraged to share in addition to targeted messages to other stakeholders:

5,969 members

Email Audience including AASL Digest, School Library Smartbrief and the AASL Friday Forecast: 205,949

Websites audience: 252,827

Webinar (Zoom) audience: 531

Social Media audience: 693,936

AASL Town Hall: Leading Learning (held monthly): 450

Narrative Description Members/non-members/other stakeholder engagement:

During the second quarter of FY21, AASL worked with a digital marketing platform to promote the AASL National Conference and reach non-members through social media posts. AASL sent emails about the conference opportunities targeted to specific audiences by region, occupation such as school administrator, or vendors for exhibitions.

Zoom has extended the reach to members and non-members. AASL Town Halls began in March of the pandemic as weekly zoom sessions open to all as a way to share challenges and ideas. It soon gathered a following and built a sense of community. The *AASL Town Hall: Leading Learning* are now held monthly with hour long sessions via Zoom typically facilitated by the AASL President with additional panelists on a specific topic. The interactive sessions allow attendees to ask questions in person through audio and video in addition to an active chat that highlights the individual. Attendance has averaged around 150 with archives posted for additional viewing. Positive comments are posted to social media and the February event prompted numerous posts and interest for more information about diversity audits. Additionally, the AASL Chapters have used the AASL resource to hold conferences and meetings and connect to AASL the benefit of membership and chapter affiliation.

Select Future Activities and Events:

In the third quarter of FY21, AASL provides professional development through ecourses and webinars. The School Library Promotion Event Committee is carrying out plans for various events such as twitterchats to celebrate School Library Month in April. The staff and members of the AASL National Conference Committee continue planning for the October event. The AASL Board of Directors are reviewing operational plans and budgets for actions in FY22.

ASSOCIATION OF COLLEGE AND RESEARCH LIBRARIES

Division Executive Director:	Kara J. Malenfant (interim)
Budget:	\$4,470,639
# of Staff:	13
# of Members:	9,108 (February 2021 informal total)

Update on Pivot Strategy work and aligned unit goals:

ACRL staff met during Q2 to finalize language and begin work on the division's pivot strategy goals of rebuilding individual membership to the April 2020 level of 9,500 members and increasing organizational membership from the April 2020 level of 605 to 700 by end of FY22.

Initial projects in the development phase include using webcasts and other event registration/sign-up email lists to begin targeted marketing of individual membership to non-members through an email outreach campaign. Work on this and additional membership marketing projects will begin in earnest following the ACRL 2021 Virtual Conference in mid-April.

As of the February 2021 informal count, individual membership stands at 8,575 and organizational membership stands at 533.

A Changing Higher Education Landscape

The forthcoming *2021 ACRL Environmental Scan* provides a broad review of the current higher education landscape, including developments with the potential for continuing impact on academic libraires.

Impacts of the Pandemic on Higher Education and Students. Even after the initial wave of shutdowns in early 2020, the COVID-19 pandemic has continued to present challenges to higher education funding on multiple fronts. Enrollment fluctuations, uncertainty about international students, tuition shortfalls, losses auxiliary revenues (room and board, dining, and parking fees), and declines in tax revenues persist. Students themselves have also suffered financially from the COVID-19 pandemic. A survey of over 1,500 students at Arizona State University found that "40% have lost a job, internship, or job offer, and...[l]ower-income students are 55% more likely than their higher-income peers to have delayed graduation due to COVID-19." A Pew Research Center Report found that "young adults ages 18 to 29 were also more likely than older Americans to say that they have lost a job or taken a pay cut because of the coronavirus outbreak." For students who can afford continued attendance, the sudden shift to online learning has been a challenge in and of itself. Lack of access to appropriate technology and/or adequate spaces for completing coursework negatively affected students who relied on campus resources.

ACRL has developed a variety of resources to help the academic library community weather the pandemic, including the [Pandemic Resources for Academic Libraries LibGuide](#). The [Advocating for Library Workers During Uncertain Times](#) blog series and webcast provides support for library workers who are finding themselves in increasingly more complex fiscal situations, with layoffs, furloughs, and budget reductions being announced and anticipated. A new ACRL Consulting service, [Regenerating the Academic Library](#), launched in early Q3 with a focus on the impact of the massive changes in higher education and academic libraries over the past year.

Open Educational Resources and Controlled Digital Lending. Awareness of and support for OER continue to grow. With the abrupt transition to emergency remote teaching laying bare some of the other equity gaps related to students' access to course materials, many institutions responded by renewing their emphasis on OER — which offer immediate, gratis, unrestricted, and perpetual access — as an effective tool for more equitable teaching in a time of crisis and even a key component in a reimagined model of higher education.

Librarians, in particular, were key drivers of OER as a pandemic response, offering workshops and facilitating grant programs for OER adoption with renewed urgency. Interest in controlled digital lending (CDL) increased dramatically as the COVID-19 pandemic restricted access to library physical collections. CDL is a legal argument, not established law, that claims libraries may legally circulate digitized titles in place of physical titles held in their collections, in a controlled manner. Relying on existing carve outs in the exclusive rights of copyright holders, specifically the first sale doctrine, fair use, and Section 108, CDL argues that so long as a library legally owns a physical copy of a title, it may digitize that title. These approaches are not without controversy. Cautious of further lawsuits, many libraries are quietly exploring approaches to CDL that balance copyright concerns with the access concerns of their patrons.

ACRL is committed to supporting academic and research libraries in accelerating the transition to more open and equitable systems of scholarship in a [myriad of ways](#) like our [scholarly communication toolkit](#), [research agenda](#) and upcoming webinar series on [scholarly communication](#) and [copyright and course reserves](#). ACRL nurtures new roles supporting OER, by offering [training workshops](#) and a [recent publication](#) showcases OER practices and policies of college and small university libraries.

ACRL staff continue to monitor the environment and adapt/develop new revenue ideas, with several projects in the planning stages for increased focus following the completion of ACRL 2021 in mid-April, including reevaluating the ACRL awards program through the dual lens of sustainability and equity.

Member and Stakeholder Reach:

of Members: 9,108 (February 2021 informal total)

of Members/non-members/other stakeholders reached during quarter:

- Paid E-Learning attendance: 118 individuals and 17 groups
- Newsletter total opens: 85,161
- Print and ebooks sold/distributed: 1,265
- Journal website total views (C&RL, C&RL News, RBM): 770,407
- C&RL News total print circulation (3 issues): 26,842
- ACRL website total visits: 205,907
- Facebook: 54,105 impressions, 3,614 engagements
- Instagram: 12,102 impressions, 954 engagements
- Twitter: 400,630 impressions, 6,597 engagements

ACRL membership rose slightly between January and February 2021. However, membership is down approximately 8.2% (841 members) when compared to February 2020. A continued slight increase in membership is expected during Q3 due to member discounts on ACRL 2021 conference registration on ACRL's regular two-year membership cycle. Although there has been a decline in overall membership over the past year, there has been high engagement across ACRL's online platforms and events.

- During these unprecedented times of the COVID-19 pandemic; heightened social awareness of systemic racism, oppression, and institutional violence; and economic recession-- all of which disproportionately impact communities of color-- the ACRL Board of Directors has approved funds to support up to 50 memberships for ALA and ACRL (a value of over \$200 per membership) for Black, Indigenous, and People of Color (BIPOC) library workers, especially those who serve underrepresented populations. Applications for the program were due in February 2021.
- ACRL's e-Learning program offered six live webcasts during this report period. 118 individuals and 17 groups participated in e-learning focusing student wellness and libraries, virtualizing makerspaces, digital scholarship partnerships, and open educational resources and affordability. Upcoming topics for the ACRL e-Learning program include scholarly communications, leadership, and developing signature

pedagogies. ACRL also offered one free ACRL Presents webinar during this report period which focused on user experience during the pandemic.

- Four new ACRL books were published during the quarter and were promoted for purchase to members and other stakeholders. 707 ACRL print and individual-use ebooks were sold in Q2, along with 558 institutional ebook copies via distributors.

Key Activities

ACRL 2021 Virtual Conference – Registration for the ACRL 2021 Virtual Conference, “Ascending into An Open Future,” opened in February. The conference will be held April 13-16, 2021. ACRL 2021 features a mix of more than 300 live and on-demand programs, interactive discussion groups, eye-popping posters, a social wall, fun connections and prizes, and content on demand for 30 days. The conference also features author Tressie McMillan Cottom and journalist Mona Chalabi as keynote speakers along with invited presentations from Kaetrena Davis Kendrick and We Here administrators Jennifer Brown, Jennifer Ferretti, and Charlotte Roh. Complete details on ACRL 2021 are available on the [conference website](#). Three weeks out, total paid registrants are 2,883 with 38% first time attendees, 75% not speakers, and 14% said “NO” to, If there were NOT a global health pandemic would you have gone to the conference in Seattle? An additional 286 exhibitors are registered, bring the total number of attendees to 3,168. ACRL projects a modest net for the ACRL 2021 Conference in FY22 that is higher than budgeted (but still much lower than past ACRL conference actuals) and will just cover planning costs incurred in FY21, including staff time.

2021 ACRL Awards Recipients – Recipients of ACRL’s 2021 awards were announced in late January and early February. Julia M. Gelfand, applied sciences and engineering librarian at the University of California (UC)-Irvine, is the 2021 ACRL Academic/Research Librarian of the Year. The Davidson College E.H. Little Library, Tulsa Community College Library, and the Loyola Marymount University William H. Hannon Library received the Excellence in Academic Libraries Awards. Mark E. Phillips, associate dean for digital libraries at the University of North Texas was named the 2021 recipient of the Hugh C. Atkinson Memorial Award, jointly sponsored by ACRL and Core. A full list of ACRL section award recipients is available on the [ACRL website](#).

New ACRL Framework for Impactful Scholarship and Metrics - The ACRL Board of Directors approved a new [Framework for Impactful Scholarship and Metrics](#) (PDF) at its November 2020 virtual meeting. The new document was developed by the ACRL Impactful Scholarship and Metrics Task Force as a framework for the measurement and evaluation of academic librarian scholarship. The framework is designed to address gaps between current scholarly evaluation practices and impactful scholarly activities within academic librarianship, including ways to measure and evaluate the impact of a wide range of research outputs.

ACRL Learning Analytics Toolkit - The ACRL Value of Academic Libraries Committee announced the launch of the new [Learning Analytics Toolkit](#) in January. The Learning Analytics Toolkit is a freely available professional development resource that library professionals can use to learn more about learning analytics and how they intersect with academic libraries. In addition to providing foundational knowledge about learning analytics, the Toolkit provides users with up-to-date publications about privacy and ethics, student success, potential outcomes, sources of data, and examples of libraries’ contributions to learning analytics.

ACRL RoadShow Workshops Move to Virtual Format - The ACRL RoadShow program brings high quality workshops directly to campuses covering a wide range of topics that help academic librarians tackle the greatest issues facing the profession today. The program, however, has been on hold due to the impact of COVID-19. Now, workshop teams are pivoting the same great content from these workshops into new [Off-RoadShow](#) virtual learning opportunities. Current Off-RoadShows including Scholarly Communication and Open Educational Resources & Affordability are being presented as multi-part webcast series designed for individual or group participation.

Select Future Activities and Events Through End of Next Fiscal Quarter:

The ACRL 2021 Virtual Conference will be the most significant event for ACRL in Q3, with significant staff time being devoted to marketing and delivering the conference. Focus on activities such as e-learning, publishing, appointments, elections, and membership promotion will continue during and after the conference cycle.

ASSOCIATION FOR LIBRARY SERVICE TO CHILDREN

Division Executive Director:	Aimee Strittmatter
Budget:	\$1,500,000
# of Staff:	8
# of Members:	3,797 (Estimate)

Update on Pivot Strategy work and aligned unit goals:

This past quarter, ALSC developed three Pivot Strategy Aligned Unit Goals. The development of the goals was supported by staff input and the work continues with ensuring a shared understanding of timelines, roles, and measurements of success.

- *Evaluate and ideate new opportunities within the continuing education portfolio to increase member value and to increase customer base in FY22.*

Aligning with the continuing education impact stream, as part of ALA's Pivot Strategy, provided an opportunity for ALSC to connect this goal with the continuing education strategy development work that had already begun. ALSC is considering ways to expand on existing and successful continuing education programs, such as the Bill Morris Book Evaluation seminar and the newly offered one-day virtual spring conference, *A Celebration of Illustration*, into revenue generating streams that will attract new members and provide exciting opportunities for existing members.

- *Implement strategies and resources that clearly articulate the value of ALSC and ALA membership resulting in an increase of ALSC's membership by 2% by end of FY22.*

Strategies to distinguish our member areas of acquisition, engagement and retention are being evaluated in conjunction with the products and services that ALSC provides to support each phase of membership.

- *Develop a content strategy to maximize the monetization of at least three new publication and product lines to at least 1-2 new audiences/markets while simultaneously building awareness of the ALSC brand by end of FY22.*

In January, the ASLC Board approved the recommendations of the Diversifying Revenue Streams Task Force that focus on high value, high interest, proprietary content, and create an entrepreneurial culture among members and committees. A working group has been formed to further develop and prioritize the work of task force.

Describe the major issues, trends, opportunities, or concerns that your unit has or is responding:

The impact of COVID-19 continues to play a significant role in determining the theme of activities, practices and conversations among library professionals and other groups serving children and their caregivers. As we saw in the first quarter of FY21, several areas of interest continue to be points of discussion on the ALSC blog

and social media, ALA Connect, ALSC Discussion Lists, webinars, and national media. With a COVID-19 vaccine being made more widely available this year, questions will move to addressing what additional considerations need to be made as prospects for opening up libraries and other institutions come into focus. Library professionals are engaging in conversations and idea sharing around new visions of library services.

Many discussion topics that ALSC has engaged in or addressed with our membership in the last quarter remain prominent, including continuing education and virtual spaces, the impact of COVID-19 on education and student success, advocating for youth services library staff, and youth and family trauma. The ALSC 2020-2023 Strategic Plan reflects these changing times and is under review by the ALSC Board to ensure its relevance and commitment to the needs of ALSC members.

Continuing Education and Virtual Spaces - ALA Midwinter Meeting – Like many in person events that transitioned to virtual ones, this virtual event afforded more individuals the opportunity to attend the conference and engage with their colleagues around issues of digital equity, diverse literature and the excitement generated by the Youth Media Awards. Many attendees saw the benefits of a virtual conference experience. ALSC will continue to explore how upcoming events can be adapted to a virtual space and to improve upon those that have already been hosted.

COVID-19 Impact on Education and the Summer Slide – Even as schools begin to open to in person learning and libraries continue to expand their digital collections with e-books and audio books, provide curbside pick-up for physical materials, improve WiFi and computer/tablet access to support students, these efforts are not enough to reduce the growing gaps in education for children whose educational experiences are varied, inconsistent and often inaccessible. Library professionals will be navigating summer learning programming and considering how that programming can supplement the learning loss for students who were unable to attend school in person.

Advocating for Youth Services Library Staff – The pandemic and subsequent library closings have resulted in employment reductions of library staff through furloughs, layoffs, and reduced work hours. As libraries assess their budgets going forward, the value of children's library professionals may be overlooked. Library staff who serve youth need tools and resources to help advocate for their positions, both within their libraries and through local and national advocacy efforts. #LookToLibraries provides resources and highlights the value of children's library professionals as youth media mentors. In addition, ALSC developed a Community Forum that addressed how to support and advocate for furloughed and laid off library workers. Content utilized the ALSC Championing Children's Services Toolkit and advocacy resources from the ALA Public Policy and Advocacy Office.

Youth and Family Trauma – Our nation continues to navigate changes around the pandemic as new virus strains are identified and vaccines become more available. Library professionals and their family communities have experienced children losing family members, feeling the consequences of job loss, economic instability and food insecurity, separation and isolation from family and friends, and devolving expectations for life as we remember it. Additionally, our nation is experiencing political turmoil and a profound response to racial injustices that have received new and necessary attention. Our libraries are doing more now than ever to support their communities in the midst of these traumatic life changes. Library staff want to know how to identify trauma and provide informed resources to support children and their families as they navigate the outcomes these experiences have on physical and mental health. ALSC members are aware of these issues and sought feedback from members to develop continuing education opportunities that will help library staff provide trauma-informed exchanges and resources to their library communities. Analysis of survey results is underway.

of Members: 3,797 (estimate as of March 2021)

443.9k - Twitter Impressions, a 25% increase compared to FY21 Q1

40,323 - Reach of Facebook posts

31,797 - Recipients of emails

Narrative Description Members/non-members/other stakeholder engagement:

Compared to February 2020, ALSC is experiencing a 2.42% decline in overall membership according to informal membership statistics. While this decline continues to be expected due to COVID-19 and financial challenges, there are still noteworthy successes for Q2. For example, estimates from January 2021 showed ALSC having 3,842 total members, which was a 1% increase compared to the prior month. Additionally, this month-over-month (MoM) increase is also higher than the .2% MoM increase during the same time in FY20. January's membership successes are likely due to excitement generated by the 2021 ALA Youth Media Awards announcements, which named Michaela Goade as the [first Native American to win the Caldecott Medal](#).

- 443.9k Twitter impressions earned in FY21 Q2, a 39% increase compared to FY20 Q2. This increase is due to the excitement of the 2021 ALA Youth Media Awards, ALSC's 2021 Notable Children's Books and Recordings lists, and promotion of the ALSC/Candlewick Press "Light the Way" grant, which supports a library in reaching underserved populations through an innovative program idea.
- Engaged 76 members in ALSC's February Community Forum, Our Work Matters: Advocating for Youth Services, which highlighted ALA and ALSC advocacy resources and how they can be used to demonstrate library workers' impact.
- Engaged 378 members and non-members in online Notable Children's Books and Recordings public discussions, which are usually held at Midwinter.
- Over 100 members and non-members attended ALSC's webinar on Smart Scheduling in Youth Services, focused on staff and program scheduling.

Select Future Activities and Events:

[ALSC Book & Media Awards Shelf](#) – On March 24, 2021, ALSC launched a database driven website delivering a collection of exemplary books, recordings, apps, websites, and other media for children (birth to age 14) that has been evaluated, and selected using established terms and criteria, by ALSC members. This new resource will help educators, library workers, and families more easily find media that supports their needs and appeals to their interests. The Book & Media Awards Shelf is at <https://alsc-awards-shelf.org/>.

[A Celebration of Illustration!](#), a virtual conference, will be held Friday, May 14, 2021. In addition to six education programs centered on illustration, the conference will feature two general session programs, Excellence in Illustration: A Panel Discussion with 2021 Caldecott, Coretta Scott King Illustration, and Pura Belpré Youth Illustrator Award Winners, and The Art of Information: A Conversation with the 2021 Sibert Honoree Illustrators.

[El día de los niños/El día de los libros \(Children's Day/Book Day\)](#), Día, is a daily celebration of children, families, and reading that culminates yearly on April 30 and emphasizes the importance of diverse books for children of all linguistic and cultural backgrounds. To mark the 25th anniversary in 2021, artist and children's book illustrator Reggie Brown has created [commemorative artwork](#) under the theme "Each Story Matters. Every Child Counts."

Children's Librarianship: International Perspectives- ALSC will collaborate with the ALA Kent State University Student Chapter and International Federation of Library Associations and Institutions (IFLA) to host a one-time special event for those interested in learning about children's librarianship across the world. The countries to be represented are Russia, Norway, and Germany. Collaboration on this event will allow ALSC the opportunity to reach students and appeal to international members and prospects.

CORE

Division Executive Director:	Kerry Ward
Budget:	\$1,000,000
# of Staff:	7
# of Members:	5,931 estimate as of February 2021

Update on Pivot Strategy work and aligned unit goals:

Core staff drafted the following goals for presentation to ALA Senior Management and Core leaders:

MEMBERSHIP

Core personal membership will increase by at least 2% in FY22, based on the final FY21 membership report.

- Strategy 1: Every member will be a member of at least one section, interest group, or committee.
- Strategy 2: Every non-member registrant for Core CE will be invited to become a member.
- Strategy 3: Develop and implement an onboarding process for every new member.

CONTINUING EDUCATION

Net revenue from Core continuing education (webinars, courses, live events) will increase by at least 6% in FY22, based on the FY21 final CE net revenue.

- Strategy 1: Develop a fundamentals web course on library leadership and management.
- Strategy 2: Develop a fundamentals web course on library technology.
- Strategy 3: Establish on-demand webinar archives.

CONTRIBUTED REVENUE

Contributed revenue will increase by at least 10% in FY22, based on FY21 final contributed revenue.

- Strategy 1: Develop sponsorship packages for Core events.

EQUITY, DIVERSITY, AND INCLUSION

To integrate EDI data, tracking, and reporting across all unit goals and projects.

- Strategy 1: Determine baseline engagement of BIPOC and people from underrepresented groups and Core.

Environmental Scan

Core is just beginning its strategic planning process and met with our facilitator on January 11. Much of the Midwinter Core Board meeting, and the months ahead, will be devoted to answering these questions. The Pivot Strategy has already been shared and will be one of the guiding documents in this process. We'll be working with our Leadership Team and Board, section leaders and volunteers, and likely member focus groups to understand all the issues our members are facing and where Core can be most useful. Our plan will cover two periods: priorities for the next six months, which will complete our transitional year; and priorities for FY22, our first fully operational year with complete sections, committees, programming, etc.

More broadly, we know we'll be dealing with the pandemic for months to come. It looks increasingly unlikely that a live Annual Conference will be held in Chicago. The financial impact of this for Core will be slight, with lost preconference revenue, however, the impact for ALA will likely be serious. While this likely shift to virtual will give ALA another opportunity to provide value to members in a new format, like 2020 Annual, virtual CE will continue to be the norm through 2021. We've heard from a number of members that even if live events

are held and members would feel safe enough to attend, travel/conference budgets have been zeroed out at many institutions.

Looking at nonprofits in general, it is clear that COVID-19 has a hugely negative impact:

- In a May survey by Charities Aid Foundation of America, nonprofit leaders said they expect donations to fall by at least 20% in the next year.
- A Nonprofit Workforce Trends Report found 88% of nonprofit organizations experienced a 15% or more revenue decline, with 13% having to suspend most or all operations.
- And according to a report from Johns Hopkins University, over 1.6 million nonprofit workers have lost their jobs due to the pandemic and drops in funding.

Related to the Pivot Strategy, Core will focus on providing member value and fulfilling the commitments we made to members when we asked them to vote for innovation, career development, and community in a new division.

of Members: 5,931 estimate as of February 2021

Member and Stakeholder Reach

For the quarter ending February 2021, Core CE reached approximately 1,700: 293 individuals, 113 groups (representing many hundreds more participants), 1303 students.

Additional notes:

- **Membership:** lower than anticipated Core membership dues in FY21. ALA personal membership has also declined an estimated 3% to just below 52,000 as of February. This is a 12% decline from 2020 and a 10% decline when compared to the same time in 2019. We know as ALA membership declines; Core membership declines as well. Part of this decrease is due to job losses in the profession. Part is due to the perceived lack of value in membership. The former we have little control over, though we can advocate for the value of the profession. We have much more control over the value we provide for Core members, and that will always need to be our focus.
- **Continuing education:** we are reaching a wide audience but seeing lower than budgeted webinar revenue, but near budget revenue for courses. We are closely monitoring CE registration and revenue. First quarter indications are that the market is saturated with online CE, competition is increasing, and that in general there is Zoom fatigue. This has been evident in lower than usual webinar attendance. Even courses which quickly sold out in the past are taking longer to fill or are not selling out. We are also looking at content. Staff is working with the CE Committee to make sure content is being developed across our new functional areas and that all members will find content of interest. Finally, we believe that members are still getting used to Core, its content, and where to look for our CE offerings, so staff is working to better align content descriptions and marketing.

Activities:

As noted, Core is in its transitional year so activities, except for CE, are focused on operational ramp up of a new organization:

1. Migrated 50 interest groups that are up and running;
2. Implemented 6 sections, any of which you can join, and put leadership teams for them in place;
3. Set up 31 committees at the division level and are taking volunteers for both the current year and coming year that starts July 1;
4. Created the Core Involvatron 3000 to help you find your home and get involved in Core;

5. Took nominations for 4 awards and 1 scholarship, and those juries will be selecting recipients over the next 2 months;
6. Ran 13 courses and 20 webinars, including 2 free ones;
7. Implemented e-Forums (2-day, email-based discussion on specific topics) and ran 6 discussions;
8. Started a new education format called "classrooms" that feature hands-on, interactive learning over 2-4 sessions;
9. Unified all our events into a single calendar and all of our publications into a single catalog;
10. Began selling some great CoreWear that supports memberships for library workers in need;
11. Expanded the jobs site to include more types of positions in collections, management, technical services, and technology.

Future Activities and Events:

Planning for the upcoming Preservation Week (April 25-May 1, 2021) is well underway, with Nikole Hannah-Jones serving an honorary chair.

PUBLIC LIBRARY ASSOCIATION

Division Executive Director: Mary Hirsh (Interim)
Budget Amount: \$1,335,547 for the Quarter
of Staff: 13
of Members: 8,899

Update on Pivot Strategy work and aligned unit goals:

PLA has determined two goals aligned to the Pivot Strategy and set sub-goals and deliverable as we work towards them over the coming year.

Goal 1: Increase PLA Membership by 2%

Description: Offer relevant services that increase number of dues paying members

Deliverables:

- Expand Virtual Conference held in conjunction with PLA2022
- Market membership to non-member grant recipients
- Collaborate with Membership team on campaign for student members

Goal 2: Increase PLA CE revenue by 2%

Description: Expand paying audience for PLA continuing education events

Deliverables:

- At least once per month, off member-sourced and led learning opportunities
- Expand audience for virtual workshops and events through collaboration with ALA CE unit
- Increase partnership and sponsorship contributions to CE events

PLA was also proud to partner with the ALA eLearning Solutions, the new CE unit described in the Pivot, to provide training for the FY2021 California Libraries Learn (CALL) LSTA Grant awarded to CLA from the California State Library. Through ALA, PLA contract with CLA to offer three live webinars available to all public librarians

in the state of California. These three webinars brought in \$24,000 in revenue, representing almost 60% of ALA's total training contract of \$41,000.

Describe the major issues, trends, opportunities, or concerns that your unit has or is responding to:

This quarter, PLA is mindful of two main opportunities impacting public libraries: The recently passed American Rescue Plan Act, and the gradual reopening of local libraries as pandemic impacts begin to ease.

1. Public libraries are eligible for billions of dollars in recovery funding as part of the \$1.9 trillion American Rescue Plan Act ([ARPA](#)) of 2021 passed by Congress on March 10, 2021. Some of this funding is specifically allocated for libraries, such as new IMLS funding, and some of it will require public libraries to apply for new funding through the Federal Communications Commission (FCC) or through new funding available at the state and local level.

ARPA includes \$200 million for the Institute of Museum and Library Services (IMLS), the largest single increase in the agency's 25-year history. The bulk of this funding (\$178 million) is allocated for state library administrative agencies on a population-based formula (i.e., Grants to States), with a \$2 million state minimum. IMLS is working now with state library agencies to confirm state allotments and allowable uses for the funding.

PLA is mindful that some of this money could come back into the association through subscriptions, purchases, and registrations. PLA is carefully monitoring the rules around allowable use so that it may appropriately market and position its products. For example, PLA has a wealth of digital literacy products that could be repositioned to be an allowable expense. This would benefit libraries, expanding their capacity to serve their communities and the association in generating revenue and new users.

2. Last quarter, PLA recognized libraries were open although buildings were closed as a trend. In the intervening months, more and more libraries have slowly begun to reopen their doors and welcome patrons in. This is an exciting but stressful time for libraries, as they figure out a new normal. In addition, a recent PLA member survey indicated that 57% of public library workers are experiencing burnout.

PLA recognizes that public library workers may need a different type of support from PLA. Over the past year, formal professional development and networking has been a priority, as evidenced by the high registration numbers for PLA webinars and other events. As library workers return to in-person patron interaction, attention may shift to service provision, which may impact ability to participate in real-time events. Library workers may not have the capacity to take up new work or programs. PLA sees opportunities to be proactive in framing its works as "making life easier for library people" instead of learning and growth opportunities.

of Members: 8,899 PLA members

Member and Stakeholder Reach

- Over 10,000

PLA membership declined 1.3% as of February. PLA is exactly a year out from its 2020 conference. We are working hard to provide a varied program to attract and retain members and fulfill our Pivot goal of an increase of 2%.

PLA launched its first [Benchmark Briefings](#) to support public libraries' access and use of data. The free resource translates data from the [Public Libraries Survey](#) (PLS) conducted by the Institute of Museum and Library Services (IMLS) into accessible infographics to ease library peer comparison across key characteristics. The

Benchmark Briefings were developed using IMLS fiscal year 2018 [Public Libraries Survey](#) data by members from PLA's [Measurement, Evaluation, and Assessment Committee](#) (MEAC), PLA staff, and the American Institutes for Research.

In collaboration with ALA Editions, PLA issued a new publication. "[Pivoting during the Pandemic: Ideas for Serving Your Community Anytime, Anywhere](#)," shares how several libraries transitioned to virtual and socially-distanced services.

Additional highlights from the last quarter include:

- A sold-out [Leadership Lab](#) series
- Launch of the second [Family Engagement](#) series, which will run through August
- 3 paid [webinars](#), reaching 91 individual registrants, 33 groups, and generating over \$8,000
- Expanded promotion of health insurance enrollment through PLA's [Libraries Connecting You to Coverage](#) project, fueled by new special enrollment periods opened up by the Biden administration
- Extension [PLA's Skilling for Employment Post COVID-19](#) project, due to Microsoft's decision to extend free training and low-cost certifications through the end of 2021

Select Future Activities and Events:

- PLA anticipates opening its 2022 Conference website in early May. The proposal window will be May 3-June 14. Conference registration will open in FY22 Q1.
- PLA has 3 paid webinars scheduled next quarter.
- PLA will launch its [Census Data Literacy](#) project, with over 1,000 people already registered for the first free webinar.
- PLA will execute a new grant agreement with AT&T to improve [DigitalLearn.org](#) and increase digital skills training in communities.
- The PLA Board continues to meet monthly to refine and advance to goals of the association.
- We anticipate identifying a permanent PLA executive director.

REFERENCE AND USER SERVICES ASSOCIATION (RUSA)

Division Executive Director:	Bill Ladewski
Budget:	\$378,717
# of Staff:	3.1
# of Members:	2,673 as of January 2021

Update on Pivot Strategy work and aligned unit goals:

FY21/22 Goal 1 - Increase RUSA Membership by 1% per year by rebranding RUSA to increase the visibility of its work, targeted outreach to non-members, focused recruitment and retention measures, ongoing member engagement efforts, and student membership campaign in FY22.

- With the most recent membership numbers provided in January, RUSA had 2,673 members. This represented a slight increase from December's membership figure of 2,665. In February, ALA Membership Director Melissa Walling met with the RUSA Budget & Finance committee and shared advice on steps RUSA could take to work towards growing overall membership. These included targeting student members with a reduced student membership rate and exploring potential opportunities to partner with other Divisions on membership bundle packages. This bundle package

strategy speaks to the membership overlap RUSA and many Divisions have with each other. Potential membership bundle offers would be targeted to smaller, specific groups, for instance recently lapsed members, to gauge if something like this would ultimately be successful on a larger scale in helping member growth. This strategy is in a very early stage and conversations will hopefully continue over the coming months.

FY 21/22 Goal 2 - Increase RUSA Continuing Education revenue by 2% per year by creating the RUSA essentials bundle, increased CE programming and program collaboration and pursuing partnership and sponsorship contributions to CE events in FY22.

- RUSA continues to develop a CE focused RUSA essentials bundle and it is our hope to be able to launch that soon. In that past month, discussion around holding a RUSA Virtual Forum has increased, and early indications from positive internal feedback are we would like to target holding a Virtual Forum for either March or April 2022. This timeframe was considered preferred as it would occupy the time between January LibLearnX and June Annual Conference where any potential conflict hopefully would not occur. An initial budget has been drafted and by managing the Virtual aspect of the program internally (likely Zoom), costs for this program should be kept at a minimum. If the program proves successful, we hope this will bring in additional revenue to our CE revenue line helping us achieve 2% growth or higher.

Describe the major issues, trends, opportunities, or concerns that your unit has or is responding to:

Programming addressing COVID-19 impact on Reference and User Services: As the COVID pandemic has now reached a full year, RUSA continues to make efforts to adapt to the needs of our members and show that we can continue to be a trusted resource they can rely on. In January RUSA hosted another of our continuing [Town Hall](#) programs. The January program was on the topic “[Services in a Time of COVID-19](#)”. For this program, representatives from each of RUSA’s six Sections presented on how the COVID-19 pandemic has required them to adapt. Some of these adjustments may carryover post pandemic for many RUSA members, as the need to adapt has forced a new way to view different types of reference and user service delivery.

Updating the Definition of Reference: In addition to our monthly [Town Hall](#) programs, RUSA also participated in programming at the recent Midwinter program, the featured discussion being that of our continued work on updating the Definition of Reference. The Midwinter discussion was the third convening around this topic since July. As the work on updating of the [Definition of Reference](#) continues, the hope is a final report will be brought to RUSA Board at their meeting during ALA Annual.

Impact of inclusion of former ASGCLA groups on membership level: Concerns RUSA has, primarily as it relates to the ongoing pandemic, is how this could negatively impact membership and the revenue it generates. RUSA’s primary revenue source is membership revenue, which makes up approximately 49% of RUSA’s total revenue. Fortunately, RUSA has noticed that the recent absorbing into RUSA of three former ASGCLA groups, [Federal and Armed Forces Libraries Interest Group](#), Physical Delivery interest group, and [Accessibility Assembly](#), has helped buffer us against the slight membership decline ALA has experienced overall since the start of the new membership year. RUSA membership has stayed relatively flat, and this can mostly be attributed to the 200-250 new members RUSA absorbed from ASGCLA.

Supporting Volunteers through ongoing pandemic: An external concern, again pandemic related, has been the toll it has had on the wellbeing of our RUSA members, and more precisely, those who provide so much volunteer time to the work we do. RUSA, like so many associations, relies heavily on its volunteers and volunteer leaders to help advance its [mission](#) and serve its members. As we move beyond a year now into this pandemic, fatigue and likely some despair has affected the mood, energy

and outlook of more of our members than we may realize. RUSA holds monthly board meetings but we did cancel our most recent board meeting as putting together a robust agenda proved difficult. As we move into the second year now of this pandemic, RUSA will try to be mindful of the requests and requirements we ask of our volunteers and volunteer leaders, and hopefully continue to work closely with them to provide the support that they need.

of Members: 2,673 as of January 2021

Member and Stakeholder Reach

- Approximately 40,000 through association wide sharing of our ongoing Definition of Reference work.

Narrative Description Members/non-members/other stakeholder engagement:

RUSA has continued to maintain a full [CE calendar](#), maintaining the growth we achieved in this area last fiscal year. RUSA Town Hall programs have evolved into a rather consistent monthly feature that continues to gain popularity with our members. Our membership has remained relatively flat this fiscal year, the absorption of three former ASGCLA groups has buffered us against the slight decline experienced overall by ALA.

- In the first half of FY21 RUSA CE has presented 6 e-courses and 5 webinars totaling 449 participants. Additional confirmed upcoming CE programming consist of 7 e-courses and 3 webinars. RUSA CE is currently on pace to match its output of FY20.
- Our [RUSA Town Hall](#) programs continue to be a popular attraction. RUSA held three separate Town Halls in the second quarter. Those topics were: [Definition of Reference](#) (December), [Services in a Time of COVID-19](#) (January) and [Showcase for New Member Groups](#) (former ASGCLA Groups – February). Combined attendance for these free Town Hall programs were approximately 400.
- Through the work and guidance of the RUSA Futures Task Force, efforts on membership retention and recruitment will be prioritized as we move through this fiscal year. A membership dues increase for RUSA has been discussed, and internally RUSA will try to partner and work more closely with ALA Membership as they add staff resources this year. RUSA is hopeful that opportunities to collaborate with ALA Membership on recruitment and retention efforts and strategies will deliver positive results.

Select Future Activities and Events Through End of Next Fiscal Quarter:

Call for Volunteers: RUSA will be presenting a Town Hall program in April as a '[Volunteer Open House](#)'. Representatives from RUSA and Section Leadership will share the benefits of volunteering and opportunities where members can get involved.

Additional programming on theme of Services in a Time of COVID -19: Building off the success and interest of the January Town Hall presentation of "[Services in a Time of COVID-19](#)", the presentations given by Sections at the Town Hall will be expanded and offered as full webinars beginning next Quarter. These webinars will be offered free to RUSA members and allow for a more thorough discussion on the unique ways members in our different Sections have pivoted in their work due to the pandemic.

Acknowledgement of RUSA Achievement Awards winners: In March, the [RUSA Achievement Awards winners](#) were announced and promotion of award winners will be ongoing through the next Quarter.

Speaker Series focusing on EDIA: The [RUSA Volunteer Development Committee](#) will continue its Speaker Series programs in the next Quarter with a program scheduled for April 23rd. Previous Speaker Series presentations were held on March 25th and February 25th. This Speaker Series is free to all RUSA members and addresses

EDIA issues in RUSA affecting whether to volunteer, impact on recruitment, continued membership and possible burnout, and any barriers or policies that may hinder participation.

UNITED FOR LIBRARIES

Division Executive Director: Beth Nawalinski
Budget: \$346,093
of Staff: 2.8
of Members: 4,050

Update on Pivot Strategy work and aligned unit goals:

- Increase United's membership by reconfiguring "group members" to align with ALA membership structure; create a clear delineation between statewide group membership, statewide training, personal membership, organizational membership, and group membership; and implementing a comprehensive communication and marketing plan to broaden reach in FY22.

Task forces of board members, member leaders, and United staff are currently working on a SWOT analysis of current benefits, needs, and opportunities for statewide group membership and training; an audit and assessment of member resources; the transition of Sympa listservs (previously open to anyone) into ALA Connect for members only, and the evaluation of potential membership models for "group members."

- Host and reach revenue goals for the second United for Libraries virtual event specifically for Trustees, Friends Groups, Foundations, and the library directors/staff working with these boards in FY22.

The United Program Committee is working with staff on proposal submission, evaluation, and selection; finalizing registration rates; creating sponsorship opportunities and developing marketing messaging for the August 3-5 event.

- Increase registration and revenues for United for Libraries' continuing education offerings for library directors/staff, Boards of Trustees, Friends of the Library Groups, and library Foundations.

United has rebranded and relaunched our monthly virtual learning as "United for Libraries Learning Live." Registration for live sessions averages 175. With the exception of January, each monthly session is available for members on-demand, including statewide access in MA, MD, MI, NE, SC, SD, and TX. We have seen noticeable rejoin, renewal, and new member activity tied to this series.

- January: [Fighting Budget Cuts and Finding Funding](#)
- February: [Proactive Advocacy and Communication for Library Trustees and Staff](#)
- March: [Building Support for the Build America's Libraries Act](#)

Describe the major issues, trends, opportunities, or concerns that your unit has or is responding to:

During the second quarter, much of focus and work by United for Libraries board members, member leaders, and staff has been focused internally. As we near completion on these projects and areas of work, we will be turning outward in quarter three and four wrapping the year up with our second virtual event August 3-5, 2021.

Governance – Over the past year, the United for Libraries board has focused internally on its structure and operational practices.

- Governance Task Force: The task force completed phase one of bylaws review in the first quarter, which included the addition of a Fiscal Officer (approved by United membership in the fall of 2020). Committee restructuring is nearing completion with a revised slate of committees and charges to be presented to the board for approval at its April 2021 meeting. The creation of board member job descriptions and expectations is currently in progress with completion anticipated by June. An initial new board member training was held in February, and a working group is continuing to refine the process for further implementation in the third quarter.
- Executive Board: The United Executive Board focused its work in three areas during the 2nd quarter: (1) Board goals and strategic priorities (voted on by the full board at its February 2021 meeting), (2) EDI statement (to be voted on at the April 2021 meeting), and the appointment of the fiscal officer.
- Fiscal Officer & Finance Task Force: In quarter two onboarding of the fiscal officer began and a Finance Task Force was established. Significant work in this area is underway in the third quarter, including background and training for the fiscal officer and the finance task force, and a comprehensive report under development for the full board at its April 2021 meeting.

Advocacy - Our most frequently accessed training and resources continue to be those focused on advocacy, messaging, funding, and fundraising.

- Jack Neal Task Force: The first training video in the *Making the Case for Your Library: Creating Board & Community Champions* is scheduled for completion in March. The launch of this series is supported by funds from a bequest from Jack Neal to United for Libraries.
- Advocacy Committee: The United Advocacy Committee is currently focused on three projects: (1) speakers bureau of board and member leaders; (2) a series of three 101-level advocacy training videos; and (3) identifying key internal and external partners along with appointing liaisons to key partners to initiative collaborative efforts.

Trustee Training – During the second quarter United rolled out a pilot program with the Colorado State Library as a first step toward statewide training partnership. Initial feedback from pilot participants is overwhelmingly positive. With the recent increase in IMLS funding to states, United is focusing efforts on establishing partnerships with new states and enhancing partnerships with current states to expand training opportunities. This is a significant area of current revenue and future revenue growth for United.

Other –

- Literary Landmarks – A legacy program from Friends of Libraries U.S.A., the Literary Landmarks program received national attention when a Book Riot article called attention to Beauvoir, The Jefferson Davis home, and Presidential Library in Biloxi, Miss. Dedicated in 2001, the Landmark was rescinded by the board in June 2020. A task force was established by the board to evaluate the program and make recommendations to the United for Libraries board. The working group has created a new application, review, and acceptance procedure, and provided a draft EDI statement to the United for Libraries board for further review. Work continues on the process for reconsideration of previously dedicated Landmarks.
- Statewide Friends Groups - United staff met with leadership of statewide Friends of the Library groups in South Carolina, North Carolina, Georgia, and Tennessee to discuss United's membership resources, how United can support the ongoing work of statewide Friends groups, and future joint initiatives and collaborations with all statewide Friends groups and United for Libraries.

- Newsletter – The United member newsletter was put on hiatus during the early months of the pandemic as we transitioned to providing real-time resources, training, and peer-to-peer connection for our members. Members responded positively to this shift and focus has continued to be on virtual learning and engagement opportunities. Staff researched and prepared a proposal for review at the April board meeting for a strategic change in member communications, shifting from a bi-monthly print newsletter to an e-newsletter and blog. This change will save United approximately \$25,000 a year in layout, print, distribution, and mailing expenses, and will enable staff to focus more on revenue-producing and membership-building work.

of Members: 4,050

Member and Stakeholder Reach

- 20,000+

United's most frequently accessed training and resources continue to be those focused on advocacy, messaging, funding, and fundraising. United held two discussion groups during ALA Midwinter: [The Future of Library Fundraising: Tips and Best Practices \(approx. 100 attendees\)](#) and [Fighting Budget Cuts and Finding Funding \(approximately 175 attendees\)](#). January's Learning Live program had 218 registrants; February's had 153 registrants. A joint webinar held in December with California Public Library Advocates titled Post-Election Strategies: Library Advocacy--Now What? had 153 registrants. United hosted a webinar with corporate sponsor Baker & Taylor about its Sustainable Shelves used book fundraising program with 263 registrants. Our listservs include Friends Groups (926 subscribers), Foundations (359 subscribers), and Trustees (873 subscribers).

The number of libraries reached through statewide partnerships includes 1733 (statewide group membership) and 1753 (statewide training). Statewide group membership provides full access to training and resources for all staff, Trustees, Friends Groups, and Foundations in the state. Statewide Training is, in most states, focused on library directors and Trustees. During the second quarter, more than 1,000 new individuals in these states registered for access to training, for a total of 17,442 individuals currently registered for one or more of United's on-demand webinars or training through our Teachable platform. Statewide Group Member states include Maryland, Michigan, Nebraska, South Carolina, South Dakota, and Texas. Region or statewide training (included resources/training varies by state) is available in Alabama, Colorado, Idaho, Illinois, Massachusetts, Montana, New Jersey, Nevada, Oregon, Virginia, West Virginia, Wisconsin, and Wyoming.

Select Future Activities and Events:

Workman Publishing (a long-standing corporate sponsor of United) reached out in late December at the request of Dan Rather, United's president's program speaker in [2012](#) and author of [What Unites Us](#), who wants to help amplify messaging and advocacy about libraries. Mr. Rather seeks to (1) use his social media presence to amplify library advocacy and public awareness messaging, and (2) partner with United for a free virtual program open to anyone. United for Libraries reached out to the Communication and Marketing Office (CMO), Booklist, and the Public Policy and Advocacy Office (PPA) to partner and work together for the event and the social media opportunities. The public event, scheduled for Thursday, April 8, 2021, is being held on Take Action for Libraries Day during National Library Week. More details and registration available [here](#).

United's April Learning Live, [Ask the Experts: Boards of Trustees, Friends Groups, and Foundations](#), will be held Tuesday, April 27, 2:00 pm eastern. A panel of experts will address common issues that arise among Library Boards, Friends Groups, and Foundations, and how to solve them. Panelists will present two in-depth scenarios, provide tips and best practices, and answer questions from attendees. During a "lightning round" session, speakers will field questions from registrants.

YOUNG ADULT LIBRARY SERVICES ASSOCIATION:

Division Executive Director: Tammy Dillard-Steels

Budget: \$641,162

of Staff: 4.5

of Members: 3,655 (Estimate)

Update on Pivot Strategy work and aligned unit goals:

YALSA is creating a member recovery campaign targeting over 3000 lapsed members from the past five years. The Membership Specialist is working with the IT department to retrieve the expired member information.

Describe the major issues, trends, opportunities, or concerns that your unit has or is responding to:

YALSA announced its partnership with the online learning platform MasterClass. Through this grant, all YALSA members will receive a free annual membership to the MasterClass platform.

The one-year membership will allow YALSA members access to the entire MasterClass platform, including online classes taught by the best in business, culinary arts, film & television, music & entertainment, photography, sports, and more.

of Members: 3,655

YALSA Membership is remaining steady. Membership revenue in November met projection. However, according to informal membership estimates (projected margin of error of approximately 2%), YALSA's membership has declined 1.5% since February.

Narrative Description Members/non-members/other stakeholder engagement:

During the second quarter of FY'20, YALSA's monthly webinars attendance garnered over 600 registrants.

YALSA launched its first Snack and Chat in December, "Supporting Teens During Difficult and Challenging Times." 325 registered for the event. Snack and Chats are webinars with a broad reach and are open to the public for free.

Select Future Activities and Events Through End of Next Fiscal Quarter:

Upcoming Webinars

- April 8, 2021; Thursday, 2 PM Eastern
Teen Mental Health: In Their Own Words
- Thu, April 22; 2:00 PM
the Importance of Seeing "Me" In Within the Doors of the Library -- Teen Summit Chat & Snack
- Thu, April 29; 2 PM Eastern
Open P-Tech Webinar #1