

ALA American Library Association

Report to Council and Executive Board

Tracie D. Hall, Executive Director

January 15, 2021

Summary of the American Library Association's cumulative and prospective activities from First Quarter 1 of FY 2021

Executive Director Summary & Highlights

- Conference Services Update
- Membership Update
- Forward Together Update
- Operating Agreement Update
- ALA-APA and Washington Office (PPA) Celebrate Anniversaries
- ALA Gains Cosponsors for Library Stabilization Fund Act
- AASL and PPA Engage White House Transition Team
- Applications open for Grants to Small and Rural Libraries
- Business Advisory Group
- ALA Staffing Update
- Financial Update
- ALA Pivot Strategy Progress Update

REPORTS OF ALA OFFICES AND UNITS

- Chapter Relations Office
- Communications And Marketing Office
- Conference Services
- Development
- Governance Office
- Information Technology (IT)
- International Relations Office
- Member Relations & Services
- Office for Accreditation
- Office for Diversity, Literacy And Outreach Services
- Office for Intellectual Freedom
- Public Policy and Advocacy
- Public Programs Office
- Publishing

REPORT OF ALA DIVISIONS

- American Association of School Librarians
- Association of College And Research Libraries
- Association For Library Service to Children
- Core
- Public Library Association
- Reference And User Services Association
- United for Libraries
- Young Adult Library Services Association

Navigating and Synching Change

The start of the calendar year and the second quarter of ALA's fiscal year finds the association in the midst of widespread change management. Members and staff are deeply engaged in exploring change at every level of the organization: Governance (Forward Together); Operational (Operating Agreement); and Strategic and Financial (Pivot Strategy). Updates and overviews of many of these areas of work will be provided at the Executive Board, Membership Information Session, and Council meetings scheduled for Thursday, January 21 through Wednesday January 27. Links to each of these meetings are provided below for quick access:

- **Thursday, January 21, 2021**
ALA Executive Board Meeting Session I
12:00 PM – 4:00 PM CT
Meeting Link: <https://ala-events.zoom.us/j/94285005693?pwd=VmJrNmdUME1hd2VUK1VwRVBGNzhSZz09>
- **Friday, January 22, 2021**
ALA Executive Board Meeting Session II (ALA ED Presents on Pivot Strategy from at 11 am)
11:00 PM – 2:00 PM CT
Meeting Link: <https://ala-events.zoom.us/j/94285005693?pwd=VmJrNmdUME1hd2VUK1VwRVBGNzhSZz09>
- **Saturday, January 23**
Membership/Information Session
11:00 a.m.-12:30 p.m. CST
Registration Link: https://ala-events.zoom.us/webinar/register/WN_XsMXfsHXS96-ZmD5QzoNXw
- **Sunday, January 24**
Council I Meeting
1:00 p.m.-4:30 p.m. CST
Registration Link: https://ala-events.zoom.us/webinar/register/WN_mD_-sjlBQo6iCba2rlspQA
- **Monday, January 25**
Council II Meeting
12:00 p.m.-3:00 p.m. CST
Registration Link: https://ala-events.zoom.us/webinar/register/WN_mD_-sjlBQo6iCba2rlspQA
- **Tuesday, January 26**
Council III Meeting
12:00 p.m.-2:00 p.m. CST
Registration Link: https://ala-events.zoom.us/webinar/register/WN_mD_-sjlBQo6iCba2rlspQA
- **Wednesday, January 27**
Executive Board Meeting III
1:00 PM – 4:00 PM CT
Meeting Link: <https://ala-events.zoom.us/j/94285005693?pwd=VmJrNmdUME1hd2VUK1VwRVBGNzhSZz09>

Conference Services Update

Conversations on COVID-19 and racial equity, shifts in LIS practice, and the preview of the new Lib Learn X program are slated to engage attendees as the American Library Association prepares to welcome nearly 6,000 attendees (against an original target of 5,000 attendees) for its last Midwinter Meeting. In addition to the intensive work of association renewal which will drive its governance meetings, Midwinter will also highlight timely keynote presentations by civil

rights icon Ruby Bridges; GLBTQIA pioneering cartoonist Christian Cooper; poet Joy Harjo; anti-racism activist Dr. Ibram X. Kendi; and our newest First Lady and lifelong educator, Dr. Jill Biden.

As well, Midwinter will feature timely convenings on the evolution of LIS services during this period of intensive change such as RUSA's "**Definition of Reference Discussion**" which follows a series of town halls on changes in how reference is defined and delivered. [The 2021 Symposium on the Future of Libraries](#) returns this Midwinter with nearly twenty sessions exploring near- and longer- term trends such as discussions on "**The Future of Digital Equity**" and Artificial Intelligence intended to help libraries adapt to the needs of our communities, and programs that preview the new Lib Learn X literature and education-forward meeting set to launch January 2022.

And don't miss...The "**I Love My Librarian**" Awards ceremony on Saturday afternoon (January 23) gives ALA members an opportunity to honor ten peer public, school, college, community college, or university librarians selected by the library community to receive a \$5,000 cash award. Likewise, the "**News You Can Use**" "[News You Can Use](#)" sessions span bookmobile and school library services, emergent conversations among ACRL members, library leaders concerned with intellectual freedom, or virtualizing professional development in remote work contexts, and provides platforms to ALA partners such as the Association of Bookmobile and Outreach Services, Digital Public Library of America, IMLS, OCLC, and United States Board on Books for Young People to engage practitioners in prescient discussions on practice and service strategies.

Midwinter 2021 will 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, a LibLearnX preview, will take place on Sunday, January 24, 2021, from 9:45 -11a.m. CST. It is intended to be the first in a series of experiential equity, diversity, and inclusion sessions.

Ending the focus on Midwinter is a callout of the Public Policy and Advocacy-designed program "[New Directions from State and Federal Policy Makers. Maximize Your Influence!](#)" which helps to answer the questions 'Where do library priorities fit in with the 117th Congress and state houses? What can we expect from the new Administration? What are the top issues most likely to move over the next two years? How can you be an effective advocate at all levels of government during COVID restrictions?' This program is well timed to coincide with the start of a new Administration, Congress, and state legislative session.

Membership Update

Although ALA projected that the pandemic would cause a larger drop, membership is currently experiencing a 7% decline from 2019. Division memberships presently totals 44,155 which is a slight decrease from last month. All divisions experienced a decline in membership ranging from 0.3% - 2.7% when comparing November to December. Year over year comparisons are not possible because of the Core merger uniting three divisions. Round table memberships currently total 18,018 which is a slight increase from last month as well as an increase when compared to December 2019. There were eight round tables that held steady or increased their membership with FMRT growing 3.5%, NMRT growing 3% and RMRT growing by 2.5%.

ALA's recent membership trends have seen an increase in our Student Members. The growth and engagement of Student Members, especially through our joint student membership program with ALA chapters is exciting and should be further encouraged. As well, the conversion of these Student Members to Regular Members will be essential to our long-term success as an organization.

Forward Together Update

Following a series of convenings in Fall 2020, ALA President Jefferson sent a call for councilors to volunteer for the next phase of the Forward Together Working Group. Twenty-five councilors indicated their interest to serve on this working

group. The newly appointed Working Group will develop the resolution based on the *Forward Together Working Group* analysis and report. The resolutions will include the various parameters of the proposed new structure at a conceptual level. Council will comment on the various resolution components with the goal of finalizing a draft and final proposal for subsequent Council Meetings in March 2021 and at the June 2021 Annual Conference. The draft calendar follows.

January 2021 Virtual Midwinter Council Meeting	<p><u>Forward Together Final Report and a TBD Appointed Working Group to Begin Shaping the Forward Together Resolution</u></p> <p>Forward Together Chairs to provide a final report to Council. This report will help inform the work of Council/TBD Appointed Working Group to begin drafting the <i>Forward Together</i> resolution.</p> <p>Note: The resolution(s) can include the various parameters of the proposed new structure at a conceptual (i.e.: non-Bylaws) level. Council will debate on the various components via the resolution and will continue to work in the development of the resolution <i>virtually</i> with the goal to bring forward proposed resolution(s) for vote at subsequent Council Meetings (i.e., March 2021, Annual Conference 2021, etc.)</p>
March 2021 Virtual Council Meeting	<p><u>Virtual Council Meeting</u></p> <p>The newly appointed Working Group to provide an update of their work to the ALA Council. This may help prepare Council for a vote in June 2021. Voting may occur.</p>
June 2021 Annual Conference Council Meeting	<p><u>Annual Conference Council Meeting: Council to Vote on the Forward Together Resolution</u></p> <p>Council will debate, amend, and vote on the various components via the resolution.</p>
June 2021 – January 2022 (6 months)	<p><u>Drafting the New ALA Bylaws Per Approved Resolution</u></p> <p>If applicable, work on drafting new bylaws may occur per approved resolution(s).</p> <p>Key Stakeholders: ALA Parliamentarian, Constitution & Bylaws Committee, Committee on Organization, and the ALA Governance Office. The last step is a review by ALA’s Legal Counsel.</p>

Operating Agreement Update

The Operating Agreement Work Group was proposed during ALA Midwinter 2020 with a final charge and appointments set in June 2020. The Operating Agreement Work Group members includes:

Role	Name	Position
Chair	Maggie Farrell	UNLV
Division Member	Clara Bohrer	West Bloomfield Township Public Library
Division Member	Diane Chen	Stratford STEM Magnet School Library
Roundtable Member	Sophia Sotilleo	Lincoln University (PA)
Membership Member	Miranda Bennett	University of South Carolina

Publishing Committee	Christine Dulaney	Library of Congress
SCOE Rep	Andrew Pace	OCLC
Member	Clara Harmon	Calumet City Public Library (IL)
Executive Board Member	Wanda Brown	ALA Past President
BARC Chair	Peter Hepburn	College of the Canyons
Division Staff	Tammy Dillard Steels	YALSA Executive Director
Division Staff	Kara Malenfant	ACRL Interim Executive Director
Division Staff	Kerry Ward	Core (previously LLAMA Executive Director)
Roundtable Staff	Lorelle Swader	Associate Executive Director
Finance Staff	Denise Moritz	Interim CFO
General Fund Staff	Melissa Walling	Director, Membership
General Fund Staff	Kathi Kromer	Director, Washington Office

The OA Work Group has met throughout the fall. The WG has conducted preliminary analysis of the current Operating Agreement and would like to update and optimize the policy. A summary of the issues being considered follows:

- Timeframe – the WG discussions are difficult and the timeframe may have been too ambitious especially given the demands on individual schedules. The WG will examine their anticipated final report due date of June 2021 and may request an extension.
- Planning and Budget Assembly (PBA) Meeting – the Operating Agreement will be an agenda item during the joint PBA/BARC/Division Midwinter meeting.
- Comments, questions, and observations may be shared with WG members. The Operating Agreement WG [website](#) also has a feedback email.

ALA-APA and Washington Office (PPA) Celebrate Anniversaries

- APA will celebrate its 20th anniversary in 2021. Originally, APA was intended for professional certification. In 2002, preliminary bylaws were expanded to include mutual and professional interest of librarians and library workers. Items such as the Salary Survey were moved to APA. APA’s goal is to celebrate and conduct activities centered around certification programs in FY 2021, and to focus on salaries and status of library workers in FY 2022. National Library Workers Day will be held on April 6, 2021 and will be one of the many dates that ALA-APA commemorates its two decades.
- ALA’s Office of Public Policy and Advocacy, established in 1945 to represent libraries’ interests on Capitol Hill, will celebrate its 75th anniversary which occurred in October 2020 all year long. Over the coming year, the association will leverage the 75-year story of ALA’s Public Policy and Advocacy (PPA) work in Washington to showcase ALA’s many advocacy wins, boost engagement from current advocates, and provide insight into advocacy work for current and potential ALA members.

ALA gains Cosponsors for Library Stabilization Fund Act

- Legislation calling for \$2 billion in emergency library resources, the [Library Stabilization Fund Act](#), was introduced in the Senate by Sen. Jack Reed (D-RI), and in the House by Rep. Andy Levin (D-MI-09) in July 2020. The [legislation would provide](#) at least \$1.7 billion of emergency aid directly to state library agencies, \$45 million for Tribal libraries, and \$200 million in competitive grants related to COVID response. In response to an all-out effort by ALA members, the Senate bill secured 17 cosponsors while the House bill secured 68 cosponsors. PPA is working with Sen. Reed and Rep. Levin to reintroduce the legislation in 2021. *Note, President Jefferson and Sen. Reed will discuss library support during a special Midwinter session.

AASL and PPA Engage White House Transition Team

- ALA worked to provide input to the Biden-Harris Transition Team. We submitted formal comments to three Agency Review Teams: the Federal Communications Commission (FCC), the Arts & Humanities (which includes IMLS) and the Department of Education. PPA had a meeting with the FCC Agency Review Team and worked with allies to reinforce the case of libraries. In collaboration with AASL, PPA submitted a [letter](#) to the Biden-Harris education transition team on behalf of ALA President Julius C. Jefferson, Jr AASL President Kathy Carroll, and leaders from forty-eight state chapters.

Applications open for Grants to Small and Rural Libraries

- PPO announced the first 200 recipients of its Libraries Transforming Communities (LTC): Focus on Small and Rural Libraries grants on January 5, while also inviting applications for a second funding round that will distribute an additional \$1.4 million to libraries. Up to 450 grants will be awarded in Round 2 of ALA's community engagement funding initiative. Library workers may apply online for grant funding by March 4 at <http://www.ala.org/tools/programming/LTCEG>.

Business Advisory Group

- Earlier this month ALA announced that Executive Director Tracie D. Hall had named 13 advisors to the newly revived ALA Business Advisory Group. Well recognized for their individual achievements, this group of advisors comes from libraries, civic life, technology, and academia and bring the power of their collective expertise to supporting ALA's business development. They are:
 - Charles Adler, co-founder of crowdfunding platform Kickstarter.
 - Adam Bush, co-founder and Provost of College Unbound.
 - Amy Eshleman, former Director of inaugural YOUMedia Center at Chicago Public Library and wife of Lori Lightfoot, Mayor of the City of Chicago.
 - Mae Hong, vice president of Rockefeller Philanthropy Advisors.
 - Sandee Kastrul, president and co-founder of i.c.stars, a technology training program founded in to prepare low-income adults for technology careers.
 - Eric Klinenberg, Professor of Social Science and Director of the Institute for Public Knowledge at New York University and author of Palaces for the People: How Social Infrastructure Can Help Fight Inequality, Polarization, and the Decline of Civic Life.
 - Jim Neal, University Librarian Emeritus at Columbia University.

- Marie Oestergaard, Director of Dokk1: Aarhus Public Library (Aarhus, Denmark).
- Veronda Pitchford, Assistant Director of Califa Group, a library membership consortium.
- Harper Reed, Chief Technology Officer, Barack Obama Presidential Campaign.
- Pam Sandlian Smith, Director of Anythink Libraries in Adams County, Colorado.
- Joyce Valenza, Associate Teaching Professor at Rutgers University School of Communication and Information Science and coordinator, School Library Concentration.
- Kelvin Watson, Director of Las Vegas-Clark County Library District

An initiative originally conceived by Past ALA President Jim Neal (2017-18) to support ALA's investigation of new business models, the Business Advisory Group was reconstituted in late 2020 and expanded beyond ALA members by Executive Director Hall to support the launch and stated goals of the association's developing strategic plan and to bring their innovative approaches and powerful networks to the table for the association's benefit and that of the wider LIS sector and the general public. Advisory Group participants have agreed to serve terms of 12 and 24 months.

ALA Staffing Updates

- Although staffing at ALA remains in a holding pattern as the association absorbs the slope in revenue brought on by the pandemic, it has prioritized hiring of the ACRL and PLA Executive Directors as well as a new ODLOS Director. Initial screenings for all three positions are underway with interviews set to commence before spring.
- In addition to the above-mentioned positions, ALA has budgeted for the hiring of a CIO, CFO, and Development Director to better support realization of the goals articulated in the Pivot Strategy.

Financial Update

- ALA has made concerted efforts to cut costs and manage expenses, but ALA finances continue to be impacted by the pandemic-associated recession and its impact on libraries. In anticipation of this, the FY 2021 budget projected decreases in each of ALA's traditional revenue lines: Conference Services, Membership, and Publishing. As well, at least half of the eight divisions also predicted a negative balance foretelling the effect of the pandemic on their face-to-face meetings and events. Apart from a few exceptions (the Baby Yoda poster, for example), the funding and staffing reductions that libraries have suffered over the length of the pandemic can be felt within the association especially in lapsed memberships that may have been dependent on library support, slowed merchandise sales as many libraries have not yet fully reopened; and reductions to ALA's overall conference attendance and revenue models in virtual meeting environments.
- This period, however, has also catalyzed the reexamination and restructuring of ALA's financial model, a process expected to continue over the next few years as ALA moves to align its more than three-dozen units financially. Operationally, and strategically. In addition to the doubling of business streams seen not only as conduits for revenue flow, but also as channels for membership and stakeholder engagement, ALA is working to centralize areas of work where federated approaches may add to purchase power or cost-savings. Similarly, ALA will also undertake program assessment work to determine tasks and activities that have limited impact on member or revenue generation, the two overarching goals of its new Pivot Strategy which calls on the work of all units to track to at least one of these outcomes and to one or more of the specific goals named in the strategy's verticals.
- Repair to ALA's financial accounting capacity and productivity remains a primary concern as the association continues to recoup time lost and reporting gaps created during its period of outsourcing these functions to a

non-US firm severely impacted by the lack of reliable digital infrastructure and access during the peak of the pandemic. Having now ended that contract, accounting functions have been brought back in-house and along with preparing for ALA's FY 2020 Audit in June 2021 and providing timely and accurate FY 2021 reports remain a top priority. FY 2020 April and FY 2021 September have been reported to staff and form the basis of the financial reporting provided during these Midwinter meetings.

- As ALA begins FY 2022 budget preparation changes to financial planning and modeling are already underway including moving from an “expense-based” to “revenue-based” budget; planning against three (high, mid, low) budget scenarios to ensure that spending is no longer fixed but modulates to a range of revenue probabilities; and that expenses align to annual revenue models rather than forecast “planned losses” during this period of fiscal revitalization.
- At this Midwinter Meeting, budget objectives are presented to guide ALA's budget preparation. Since 1997, the Budget Objectives have been titled Programmatic Priorities derived from the *ALA Strategic Directions*. The most recent Programmatic Priorities are:
 - Diversity
 - Equitable Access to Information & Library Services
 - Education and Lifelong Learning
 - Intellectual Freedom
 - Advocacy for Libraries and the Profession
 - Literacy
 - Organizational Excellence
 - Transforming Libraries

In combination with the Pivot Strategy, the focus for the next couple of fiscal years is to increase and diversify ALA revenue streams, enforce new internal controls to align expenditures with revenues, and to develop best practices in association with budget management. This focus will strengthen the fiscal underpinnings of the association and will enable ALA staff and member leaders to achieve the programmatic priorities. The proposed budget objectives for FY 2022 center each of the aforementioned programmatic priorities while focusing on the processes needed to ensure fiscal health and stability for the association and to achieve near- and longer-term financial goals.

The FY 2022 Budget Objectives are:

- **Align expenditures with revenues:** ALA staff will closely examine their expenditures according to revenue projections and adjust throughout the year as necessary to balance the FY 2022 budget.
- **Increase revenue sources:** Currently, ALA relies on three main revenue streams. The Strategic Pivot Plan is developing new and diverse revenue streams with a goal of six primary revenue streams that will support ALA priorities for the long term.
- **Develop budget surplus:** A small revenue surplus will be planned in order to build a reserve, as well as to improve the liquidity needs for association activities.
- **Focus on financial stability:** Stabilizing ALA's finances is a requisite for allowing ALA's mission and core activities to continue during a very uncertain economy at a time when the association is facing increased demand from the sector for its guidance, resources, and direct services.
- **Develop new budget metrics:** Benchmarking is critical to assessing the overarching and intertwined goals of increasing membership and revenue; the budget objectives articulated above; the performance of its now doubled revenue streams (Continuing Education and Contributed Revenue launch as standalone revenue streams in FY 2022; Data, Research, and Design launches in FY 2023); as well as to determine ALA's effectiveness

in meeting strategic priorities including digital literacy and access; equity, diversity, and inclusion in libraries and the LIS workforce; and the preservation of library services.

These metrics will directly address the priorities as outlined in previous ALA planning as well as its developing Pivot Strategy which will guide its operations over the next three to five years. Laying the groundwork for ALA's approach to fiscal management, these five Budget Objectives will guide ALA staff in developing the FY 2022 budget in addition to providing a foundation for our work in advancing libraries and library workers.

Following ALA Midwinter meetings, ALA staff will begin to work on preliminary budget planning for FY 2022. The staff will consider budget assumptions (EBD#3.20) and budget objectives (EBD#3.19) in order to support the ALA core values and Strategic Plan. The Executive Board will consider freezing net asset transfers from Divisions and Round Tables into the Endowment for FY 2022 in order to provide for operational cash needs. Please note that net asset balances will not be immediately reflected in FY 2022 budget preparation but will be confirmed following the FY 2020 Audit. Member leaders are encouraged to work with the Finance Office in their FY 2022 budget planning processes should they have any questions or concerns.

ALA Pivot Strategy Progress Update

Necessitated by changing contexts brought on both by ALA's need to rethink and renew its business plan as well as COVID-19's impact on the association and libraries more broadly, the five-year pivot strategy seeks to grow ALA's membership and annual revenues over the next five years by doubling ALA's streams of growth and revenue from three to six. The plan is informed by charrette (rapid ideation) sessions in which over 120 ALA staff members participated, as well as meetings with leaders and staff of peer associations and library organizations. In finalizing the Pivot Strategy's development Executive Director Tracie Hall met with various member groups including division boards, Council, BARC and F&A, and solicited Executive Board Feedback to further refine the plan.

Buoyed by this input, ALA staff launched the Pivot Strategy this month with a pre-launch planning meeting for Unit Managers held January 13 and two subsequent meetings for Unit Managers and for staff across the associations (all units, offices, and divisions) planned for January 27 and 28, respectively. The Pivot Strategy contains a series of cascading goals that begin with ALA's Mission and Core Values; it's commitment to producing library and community impact; the goal of membership (increase by 5%) and revenue (increase in revenue over spending to 10%) growth by 2025; and the creation of operational and financial efficiencies at the association, functional, and unit levels. A tea of ALA staff representing an array of units, offices, and divisions will have an opportunity to serve on teams charged with implementing change and monitoring progress. ALA's performance management tools are also being aligned to Pivot Strategy goals. Executive Director Hall will speak to the nuances of the plan at the BARC and Executive Board meetings and provide brief summations at one or more of the upcoming Governance meetings.

Summary slides from that presentation follow:

The Path to Transformation



ALA American Library Association

Pivot Strategy
2021 – 2025

Key Pivot Points:

- Increased Alignment
- Increased Membership
- Increased Revenue

Stronger Association Stronger Libraries



Facing Change at Every Level

- **Forward Together** (Association Governance)
- **Operating Agreement** (Functional Governance)
- **Pivot Strategy** (Performance Governance)

A Cyclical Relationship



Turning Mission into Impact

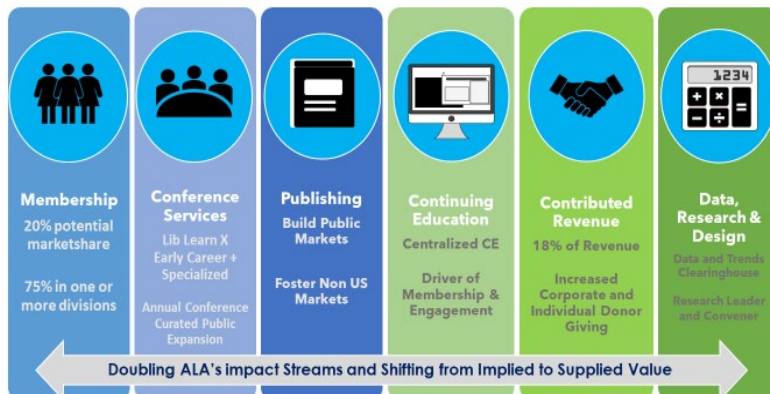
- I. ALA Mission
- II. ALA Core Values (Emphasizing Diversity and Inclusion)
- III. Library and Community Change: Reach, Mobility, Resilience, and Social Justice:
 - Information and Digital Access (including Universal Broadband);
 - Equity, Diversity, and Inclusion in Libraries and the LIS Workforce; and
 - Preservation of Library Services (across library types and services)
- IV. *ALA Pivot Strategy: The Pathway to Transformation*

Overarching Goals:

 - Increase Alignment Across Six Impact Streams by 2025: Conference and Events; Continuing Education; Contributed Revenue; Data and Research; Membership; and Publishing
 - General tactical Goals; Cross Functional Goals; Unit Goals
 - Increase Membership by 5% by 2025
 - Increase Revenue annually by 10% over expenses by 2025
- V. Tangible Impact

Two Major Association-wide Goals:

1. Increase Revenue by 10% over expenses; 2. Increase Membership by 5%



Audience/Revenue
Expansion

Financial Alignment

In the Pivot Strategy Approach to Alignment all Units track to Membership and Revenue Generation



FY22 Budget Objectives

- **Align expenditures with revenues**
- **Increase revenue sources**
- **Develop budget surplus**
- **Focus on financial stability**
- **Develop new budget metrics**

Facilitating Changes: Move from “Expense-based” to “Revenue-based” budget; Planning against three (high, mid, low) budget scenarios; Recalibration of fixed expenses to revenue model rather than “planned loss”.

Tangible Impact

Our Impact Must Flow from Our Mission and Drive it



REPORTS OF ALA OFFICES AND UNITS

CHAPTER RELATIONS OFFICE

Unit Manager: Michael Dowling

Budget Amount: \$177,834

Staff: 1.5

Revenue Stream(s) the Unit directly Supports: Conference Services; Continuing Education; Membership

ALA Chapter Membership and Revenue

State and regional library associations are in similar position to ALA with overall reductions in membership and overall revenue due to pandemic. They will be challenged through 2021 and 2022. The only increase overall has been student members where the ALA joint-student membership has increased student memberships as other memberships have gone down. This leaves diminished capacity to respond to mission, ability to respond to legislative challenges, funding reductions. Though most Virtual Conferences are not providing net revenue equal to in-person, has extended reach to

members and more non-members to attend. Hybrid approaches in the future could increase revenue if in-person and virtual attendance exceed previous amounts. Challenging times for all provide opening for reviews of membership structures and for piloting of other joint memberships between ALA and Chapters. Joint institution membership may be one to initiate.

State and Local Revenue

With state and local revenues down considerably in some instances state Chapters will need to advocate hard this year and next to maintain budgets and stave off reductions as much as possible. Libraries are facing deep cuts that resulting in staffing losses and service reductions. ALA continues to be a connector of knowledge across the country. With ALA/PPA efforts federal assistance in many areas (broadband, block grants) with partners can bring critical revenue. ALA's provision of Engage to each state Chapter with support from PPA and CRO can enhance advocacy messages and draw public as supporters at the state level.

ALA and Chapter Relationship

Chapters have expressed concern about What the proposed Forward Together would mean for state level representation at highest ALA level, and for the effectiveness of a Chapter Assembly. However, there is clear opportunity as chapters push for more effective state ecosystems (ALA Chapters, AASL Chapters, ACRL Chapters, State Libraries). ALA support is key to building stronger library communities in states.

ALA and Chapter EDI Trainings

An important accomplishment as this stage is that almost every Chapter has crafted advanced EDI goals. Working through lead of ODLOS offering EDI trainings with CRO participation can provide training and revenue at half and full day workshops at Chapter conferences and events (in-person and virtual)

Member and Stakeholder Reach

- Current membership analysis has tied the 2% increase in our membership over FY 2020 to the greater visibility and reach of our Continuing Education which has seen a 15% increase in registration overall.
- During the first quarter of FY 2021, 5,695 ALA members (including 400 student members) and 98 non-members attended our seven town hall meetings on the Future of Remote Library Services. Three more sessions will be held at the upcoming Annual Conference.
- Slow registration CRO's our mid-year symposium has meant that we are now at 70% of the registrants and revenues are at \$15,000 less than we had projected for this period. Because research shows us that the symposium is one of the main resources for networking in our sector, with five weeks left to go before the close of registration, we are working on a member-to-member direct email and social media campaign with our board to close the registration gap and to bring our registration numbers within at least 10% of target.

Key Activities:

- **ALA Chapter Joint Student Memberships:** Working in partnership with MRS have increased the number of LIS students to 5,102 through this program. Has helped to increase ALA student membership by 4% during pandemic. And added Iowa Library Association as the 49th Chapter participating in this program.
- **Libraries as Voting Locations:** ALA's Chapter Relations Office surveyed state associations to learn how many libraries serve as in-person polling places or host ballot drop-boxes. Assisted in development of the *American Libraries* story. See <http://www.ala.org/aboutala/libraries-locations-ballot-drop-boxes-andor-person-voting>: and <https://americanlibrariesmagazine.org/blogs/the-scoop/library-ballot-box/>
- **ALA Disaster Relief Donation of 20K to Calcasieu Parish Public Library:** The \$20,000 donation from the ALA Disaster Relief Fund allowed the library to acquire three portable buildings Epps, Moss Bluff, and Fontenot that

will help residents and businesses need to file insurance and FEMA claims, file for unemployment, find work, do schoolwork, and communicate with loved ones. See: http://www.ala.org/news/press-releases/2020/12/ala-s-20000-donation-helps-calcasieu-parish-public-libraries-re-open#utm_source=alanews&utm_medium=email&utm_campaign=121520&utm_content=pressrelease

- **Chapter Management Exchange: Virtual Conferences Debrief: Successes and Lessons Learned:** On December 15, an hour and a half webinar with eight chapters sharing their efforts hosting virtual conferences. What went well? What didn't work so well? What does it mean for your future Conference and other CE efforts? Brought chapter conference planners together to share on their planning, platforms, attendance, programs, budgets, exhibits, etc. Eighty-five registrations from ALA and AASL Chapters and ALA Affiliates with 49 attending that day.
- **ALA/ODLOS EDI Trainings:** The CRO Program Officer continued to be part of ODLOS training team this quarter for multiple sessions with San Mateo PL, NC State, and Space Science Institute. These three institution's staff gained valuable knowledge and insight which generated revenue for ALA.

Select Future Activities and Events Through End of Quarter:

- **Chapter Advocacy Exchange: Planning Your Virtual Legislative Day, Jan 13, 2021 02:00 PM Central**

https://ala-events.zoom.us/webinar/register/WN_DWH-aDdST6Cb9YDoJxqghQ

Virtual visits to state capitols continue in 2021. What practices are most successful in reaching legislators and what tools are available to help? Anna Celentino at Fiscal Note (Engage) will share trends and best practices from across industries and answer your questions about how to rise above the virtual chatter. Also hear tips from state leaders who hosted virtual legislative events in 2020 and are using those experiences to plan for 2021.

- **New Chapter Leaders Orientation- Webinar, Jan 15, 2021 12:00PM-1:00PM Central Time**

https://ala-events.zoom.us/webinar/register/WN_E9OmXNM5S3ySvNTkH5QyWw

The free, one-hour webinar is focused on Chapter Presidents-elect, but is for any Chapter Leader (Presidents, etc.) who would like to learn more about ALA and the ALA Chapter Partnership. It is designed to provide information on ALA, ALA and Chapter connections, and introduce you to the ALA resources available to help you lead your association.

- **ALA/ODLOS EDI Trainings-**

CRO Program Officer part of training team on Tuesday, Jan 12: Microaggressions with NC State Library, Thursday, Jan 14 Privilege Webinar for San Mateo Public Library

COMMUNICATIONS AND MARKETING OFFICE

Unit Manager: Stephanie Hlywak

Budget Amount: \$600K

Staff: 7

Revenue Stream(s) the Unit directly Supports: Conference Services; Continuing Education; Contributed Revenue; Membership; Publishing

A Crowded Media Environment

With the news media focused on two national stories – the US election and the ongoing pandemic – Q1 of FY 2021 presented a challenging environment for earned media (i.e.: traditional media and public relations). Similarly, social media and email and digital marketing have occasionally needed to pause or recalibrate based on national trends or moods. This is not new, however; we’ve been dealing with the encroachment of national unrest and pandemic coverage for nearly a year now – and we will likely see this continue.

At the same time, we are having a national conversation about the role of social media in our lives as providers of information and misinformation, and as we wade more gradually into paid relationships with companies like Facebook, Twitter and Google, we need to weigh the ethics of doing business with them against our need to continue to generate revenue. That said, CMO’s campaigns continue to find and reach their audiences online and in the media, the latter reaching key external audiences like the public.

ILoveLibraries.org

During the period from August 1 to December 31, ilovelibraries.org (ALA’s public facing website) netted 392,952 total pageviews. These were our top ten most clicked articles:

1. [What It’s Like to Be a Library Cat During the Pandemic](#) (16124 views)
2. [Curbside Larry Reminds Everyone to Check Out Their Library This Summer](#) (6571 views)
3. [We Can’t Stop Listening to this Viral Library Song](#) (4250 views)
4. [5 Reasons Everyone Should Have a Library Card](#) (3855 views)
5. [Drop Everything and Look at This Adorable Baby Yoda READ® Poster](#) (3209 views)
6. [Books Fill the Aisles at this Supermarket-Turned-Library](#) (2503 views)
7. [A Mysterious Librarian is the Breakout Star of Netflix’s "Hilda"](#) (2292 views)
8. [Librarians and Booksellers Name Their Top Books of 2020](#) (2228 views)
9. [Historical Backgrounds for Your Next Zoom Meeting](#) (2143 views)
10. [The Best YA Books, According to Teens](#) (1943 views)

Library Card Sign-up Month Campaign

For Library Card Sign-up Month this past September, CMO developed a suite of free promotional tools for libraries, including social media graphics and library card artwork starring honorary chair DC’s Wonder Woman. CMO also created a sample press release, social media copy, audio PSA scripts, yard/window sign templates as well as a customizable library-themed bingo board. In addition, CMO worked with the Graphic Novels and Comics Round Table to showcase creators with their library cards for the #CreatorsGetCarded social media promotion. The Library Card Sign-up Month webpage received more than 27,885 pageviews and there were more than 14,950 downloads of the free tools.

Library Card Sign Up Month posts on ALA and I Love Libraries social media channels

Impressions	825,755
Engagements	26,055
Link Clicks	2,494

Libraries Transform Book Pick Campaign

This September, the Libraries Transform Book Pick digital reading program returned with its second ebook selection: Lauren Francis-Sharma’s “Book of the Little Axe.” During the lending period, ebook copies were available for unlimited downloads without waitlists or holds through U.S. public libraries using OverDrive. CMO developed free marketing tools for libraries to use in promoting the program such as digital graphics, a customizable flyer, and newsletter copy. Additional resources like a reading guide, author interview, and readalike list were provided to inspire conversations. There were more than 13,350 pageviews of the Libraries Transform Book Pick website and more than 4,625 tool downloads.

National Library Week

This April 4-10, libraries of all types will celebrate National Library Week to highlight the valuable role libraries, librarians, and library workers play in transforming lives and strengthening communities. This year's theme "Welcome to your library" promotes the idea that libraries extend far beyond the four walls of a building – and that everyone is welcome to use their services. Actress, author, and activist Natalie Portman will serve as honorary chair, appearing in free digital graphics. CMO is working to create additional tools to help engage libraries and library supporters throughout the entire week.

Libraries Transform Campaign

At the end of 2020, more than 17,630 library advocates had signed up for Libraries Transform. That is an increase of more than 2,600 participants during the year. Libraries Transform pageviews during 2020 totaled 127,000, which is down 28% from the previous year. There were 27,410 downloads, a 16% decrease from the year before. Both numbers could be attributed to the pandemic and libraries refocusing their priorities.

Banned Books Week media relations

CMO produced press releases for Banned Books Week, working with OIF to produce talking points. Deborah Caldwell-Stone, Director, ALA Office for Intellectual Freedom participated in several interviews related to Banned Books Week and the top 100 challenged books of the decade, and censorship trends. She talked with Hillel Italie of the Associated Press for a story distributed nationally. The AP article was picked up by hundreds of news groups including *USA Today*, *Yahoo News*, *Washington Post*, *US News World Report*, and a host of others.

- CNN.com produced an interactive slideshow of OIF's 2019 Top Ten List. CNN.com has the largest global audience than any other news platform in the world with 165 million unique multiplatform visitors per month.
- The Guardian (UK) produced a wire story, so news groups in the US, Europe and UK Commonwealths will have access to the article.
- Also Deborah Caldwell-Stone participated in an interview with Chicago's WBBM Radio which resulted in multiple news segments. BBW preliminary coverage snapshot under search term Banned Books Week (Aug. 1 – Oct. 1) shows more than 1,400 clips, resulting in a circulation rate of more than 1.4 billion and publicity value of more than 3 million.

Carnegie Medal announcements media relations

On Nov. 16, the ALA announced the shortlist for the 2021 Andrew Carnegie Medals for Excellence in Fiction and Nonfiction. CMO secured placement with the Associated Press which was picked up hundreds of national and international news websites including the New York Times, The Economic Times, Books + Publishing, Publishers Weekly, Library Journal, Kirkus Reviews, Publishers Lunch, Shelf Awareness, The Indian Express, and Literary Hub. More than 500 news groups picked up our announcement resulting in a circulation rate of more than 259 million and publicity value of more than \$1.2 million. The ALA will announce 2021 medal winners in February 2021, during the virtual RUSA Book & Media Awards (BMA).

National Library Week announcement of Honorary Chair Natalie Portman

On Dec. 7, 2020, the ALA announced Natalie Portman, Academy Award-winning actress, director, producer, author, and activist, as the honorary chair of National Library Week, April 4-10, 2021. She will help highlight the essential role libraries, librarians and library workers play in serving their communities, especially during challenging times. CMO reached out to a host of media outlets and secured more than 200 articles and mentions including the Associated Press, **Additional coverage included** Publishers Lunch, American Libraries

ALA and I Love Libraries Social Media Metrics

	Followers/Fans	Impressions	Engagements
ALA Facebook	211,343	3,000,754	101,078
I Love Libraries Facebook	112,587	711,223	33,635
ALA Twitter	218,377	4,988,446	63,861
I Love Libraries Twitter	58,110	817,387	15,084
ALA Instagram	59,951	689,439	29,268
ALA LinkedIn	63,407	745,179	40,504

Future Activities:

- I Love My Librarian Award – announcement made Jan 11, support ongoing
- YMAs – CMO continues to serve as producer of the program
- Midwinter – CMO has partnered with conference services to promote registration and will live-tweet and support the event in real time
- Annual – Planning for announcement about Annual format at the end of January
- Additional promotions with ALA Graphics – building on successful partnership to promote REM READ Puzzle and Baby Yoda READ Poster, CMO will support the launch of new ALA-licensed products with Out of Print
- National Library Week – preparation and production of State of America’s Libraries Report
- Ongoing collaboration with Membership on a new member onboarding campaign, Publishing/Booklist monitoring and monetizing Google AdWords Grants with external partner, PPO to support dissemination of grantees stories, Development to create online giving opportunities, and Conference Services to promote Annual and LibLearnX.

CONFERENCE SERVICES

Unit Manager: Earla Jones

Budget Amount: \$1,064,878

Staff: 8

Revenue Stream(s) the Unit directly Supports: Conference Services; Membership

Preparing for a Post-COVID 19 Environment

The Annual Conference is primarily affected by external trends and threats as we proceed toward a post-COVID-19 landscape. Unknown extensions of space and capacity restraints and travel restrictions are tied directly to the public health regulations. However, as LibLearnX is the primary product of change, the SWAT analysis conducted has some key takeaways for consideration as the launch approaches the foundation is laid for subsequent years. Many of the factors identified in earlier analyses continue to hold viable and allow for pulse checks as we plan, implement, adjust, and reset tactics for success.

Assessing the Environmental Factors Impacting Lib Learn X as a New Event Platform

Strengths: Positive attributes, tangible and intangible within ALA that will make this event a success. These are within our control.

- Awards events bring excitement, increased value in the pub world
- Opportunity for concentrated time
- Publishers who exhibit
- Showcase ALAs areas of expertise
- Location
- Award events
- Revised financial model for sustainability
- Quality content
- Commitment of certain segment of our audience

Weaknesses: Issues to be mitigated to provide the event a competitive advantage.

- Staff capacity
- Technology constraints (segmenting data for marketing; outdated email platform)
- Do we have the capacity to build excitement around awards?
- YMAS don't naturally thread well with leadership and future/symposium
- Having to shoe-horn youth media awards to "fit"
- Location/keep away from cold climates
- Audience needs clear justification for attendance – ROI (CE?)

Opportunities: Attractive external factors that represent reasons for this type of event to exist and do well.

- Segmented marketing
- Opportunity for networking and engagement that is unavailable at annual conference
- ALA publicity/awards
- Both large and small publishers have indicated strong need and support of an event focused on readers advisory and book purchasing – willing to help develop content
- Gala – sponsorship opportunities
- Accreditation
- Member engagement/Presenters (opportunity to present)
- Awards – opportunity to build on with ILML
- Budget reallocation
- Regional locations

Threats: Positive attributes, tangible and intangible within ALA that will make this event a success. These are within our control.

- ALA structure changes
- Can we attract enough people to make an event affordable?
- Less travel/professional dev money for attendees – how long will they be restricted
- Restrictions in effect for exhibitors – not knowing how long will be in effect

Member and Stakeholder Reach

Event marketing statistics reveal that throughout our eblast timeframe and using our list of approximately 64K, we have sent eblasts to a total of 544,039 people. There are 165,378 ppl who opened and 13,658 clicked -through resulting in unique Midwinter website visits.

There has been significant progress in the registration pace for the Midwinter 2021 Virtual Meeting. As suspected, the final weeks have had an increase in momentum. The participant goal of 5,000 has been met, as we have 5300 (106%) total registrants to date. The timeliness of the closing speaker announcement, prior to the new year, the direct email, and social media campaign with our featured speakers, were instrumental to the pace increase. To expand opportunities for registration, the decision was made to extend the registration deadline to Tuesday, January 19, though initially scheduled to close, Friday, January 15. We are currently nearing 70% of our budget goal and there remains a potential for us to reach 80% of the revenue target by January 19. Student members and furloughed members are receiving complimentary registration, as it is important that we service and support as many of our members as possible during these difficult financial times. To date we have 1503 members receiving the student/furlough complimentary registration benefit, which is more than 5 times the anticipated number when the budget was finalized. Exhibits/Sponsorships are currently 99% to the budget goal and projecting to slightly exceed the target. We have 205 total exhibitors, 104 exhibitor sessions. Twenty-two Library Champions are represented.

Key Activities

Midwinter 21 -- The final Midwinter Event: <https://2021.alamidwinter.org/>

In November of 2020, Conference Services launched registration, marketing, and promotion for what will be the final Midwinter Meeting & Exhibits. The meeting is being produced in a virtual format with a target of 5000 registrants. The event highlights include the Symposium on the Future of Libraries which will offer sessions on future trends to inspire innovation in libraries; News You Can Use which will provide updates that highlight new research, innovations, and advances in libraries; Interactive author events; Awards celebrations including the Youth Media Awards; The Library Marketplace: Exhibitors, Stages & Resources; Live Chats opportunities; and spaces for online networking.

DEVELOPMENT

Unit Manager: Tracie Hall/Anne Manly

Budget Amount: \$2,500,000

Staff: 3

Revenue Stream(s) the Unit directly Supports: Contributed Revenue

Responding to Emerging Development Trends

Trend 1. Foundation support for racial equity significantly increased. A recent survey of 236 of American foundations shows nearly 90 percent of respondents had increased funding for organizations serving people who have been disproportionately impacted by the pandemic, including Black (75 percent), Latinx (63 percent), and lower-income communities (71 percent), and that 39 percent of those foundations reported doing so across all program areas. Respondents are giving a higher percentage of their funds to organizations led by CEOs of color. Three major foundation gifts to ALA in the first quarter of FY 2021 totaling \$4,050,000 were directly linked to ALA's commitment to addressing information poverty and the rapid diversification of the library field, as well as its long-standing core values and strategic directions around diversity and inclusion.

Trend 2. Charitable giving by individuals has increased since the start of the pandemic. Research indicates that charitable giving by *individuals* in America increased in the third quarter of 2020, boosting overall giving in the first nine months of the year by nearly 7.6 percent over last year. In addition, the total number of aggregate donations across all charitable sectors grew as well, albeit at a slower pace. More people gave to charities in the third quarter over last year but that increase appears to be slowing. The Development Office sees great potential in individual giving and is working internally and with outside experts to devise an approach that matches both the Office's talent and capacity and Association's potential. Some peer associations appear to be using the difficulties experienced by libraries during the pandemic as an opportunity for fundraising. Their efforts are enhanced by websites which put donations front and center, provide

opportunities for targeted giving, and communicate with a real sense of urgency. ALA is observing best practice examples to inform its own development of a comprehensive campaign later this year.

Trend 3. Despite a surge in charitable donations in response to the COVID-19 pandemic, nonprofits across the United States are struggling to meet soaring costs and demand for services. ALA has been keenly aware of the struggles its members and all libraries across the country face because of the pandemic. Early in the pandemic, ALA created resources for libraries and librarians that were essential in responding to the pandemic. Recently, Executive Director Tracie Hall and the Development Office secured \$1,250,000 in Emergency Relief Funds to distribute to libraries impacted by the health crisis and its economic fallout. These funds will be distributed through the Chapter Relations Office which will be working with its committee on creating guidelines.

Member and Stakeholder Reach

Development and CMO collaborated on Giving Tuesday, which took place December 1, 2020. The day-of total was \$14,516 and week-of was \$23,684. While a drop in division fundraising led to an overall drop from FY 2020 to FY 2021, the number of unrestricted donors tripled and the unrestricted donation total almost quadrupled. As Development's directive has been to increase unrestricted donations, this is a positive step, with more unrestricted funds raised than in any other year ALA has run a Giving Tuesday campaign.

After the Giving Tuesday campaign was over, Development analyzed the donor list and has identified at least one new major gifts prospect. Another addition to stewardship is the donor email newsletter. The first was sent in October, which was extremely successful with an almost 50% open rate. We currently plan to send this newsletter biannually. The Annual Fund letter, themed around digital equity, was mailed December 3, 2020. Development started receiving donations from it in mid-December, which we expect to continue through January.

Key Activities

1. At the beginning of this year, the Development Office was charged with raising \$2,500,000 in revenue as per the FY 2021 Budget. We are elated to report that we were successful in meeting that goal by the end of the first quarter.

- Foundation #1 granted ALA \$500,000 in General Operating Support
- Foundation #2 made a gift of \$1,000,000 to fund a COVID-19 responsive regrating program for libraries
- Foundation #3 approved a grant in the amount of \$2,550,000 to the American Library Association to support general operations.

2. Executive Director Tracie Hall, with the support of the Development Office and with the advice of the Philanthropy Advisory Group and others, has begun planning the multiyear "Let Our Legacy be Justice Campaign." This campaign aims to raise \$30 Million over 6 years with a target of \$15M for general operations and \$15M for ALA's endowment.

3. The Development Office provided support to at least 15 separate ALA Units in the past year for the Units' fundraising efforts. Support ranged from providing advice to identifying prospects, conducting negotiations, drafting proposals, and overseeing programs. In addition, nearly every division received data and data analysis reporting from Development Office member Remigio Torres. Development Office member Autumn Ni provided significant support to the Accounting Office during and after the termination of the EXL contract.

4. Development continued to manage the Library Champion program, the Legacy Society and the 1876 Club.

5. Development Office staff member Anne Manly worked closely with Philanthropy Advisory Group committee members on ALA's Gift Acceptance Policy.

6. The Development Office continues to manage or assist in the management of grants from donors such as Dollar General, Pokemon, Carnegie Corporation, and Acton Family Giving.

Select Future Activities and Events Through End of Quarter:

In the coming quarter, the Development Office will continue its work in donor prospecting, research, communications, and stewardship. The Office will continue towards the launch of the Let Our Legacy Be Justice Campaign. In addition, it will continue its role in gift processing. The Development Office recognizes the importance of increasing ALA's individual donor and major gifts capacity and will dedicate staff time towards building that area of revenue production. The Development Office is also committed to creating and promoting an internal ALA platform to track donor contacts.

GOVERNANCE OFFICE

Unit Manager: Sheryl Reyes

Budget Amount: \$627,000

Staff: 3

Revenue Stream(s) the Unit Supports: Membership

The ALA Governance Office supports the governing bodies, ALA Executive Board and ALA Council, consisting of about 190+ member leaders. The Office works with the appointing officer to appoint about 100+ volunteers to serve on over 35+ ALA Association and Council standing committees, as well as a number of other taskforces, working groups and finance committees. The work of these committees ranges widely in scope and member outreach.

ALA Governance has staffed the Steering Committee Organizational Effectiveness (SCOE) and now the Forward Together activities. Operations of the ALA Governance Office is defined by the needs and work of ALA's member volunteers and the potential changes ahead are like to have a considerable impact on the Office.

Key Activities this Quarter:

Due to the pandemic and the 2020 Annual Conference cancellation, the ALA Governance Office quickly and effectively pivoted and made history by facilitating the first-ever virtual Council meetings. Survey feedback from the ALA Council indicated satisfaction (4.3 out of a 5-point scale) with the Virtual Council Meetings. A [Council tribute resolution](#) of heartfelt appreciation honoring ALA staff was created and passed.

Highlighted ALA Executive Board Approved Action items, included:

- Approved, Loan from the ALA Future Fund in the amount of \$1.5 million in FY 2021 and \$ 1.5 million in FY 2022 for a total of \$3.0 million, to be repaid by 2030 at an interest rate of 1% (EBD #13.0)
- Adopted, Executive Order on Combating Race and Sex Stereotyping
- Approved, Final FY 2021 budget as listed in EBD #3.10
- Affirmed, adding LibLearnX, the Library Learning Experience to the Conference Services portfolio as an ALA member benefit as outlined in the conceptual summary, as amended.
- Approved, CD #52: Updated Forward Together Timeline

Highlighting Council Activities, included:

- Approved, the dissolution of four divisions of the American Library Association: Association for Library Collections and Technical Services (ALCTS), Library Information Technology Association (LITA), Library Leadership and Management Association (LLAMA) and Association of Specialized, Government, and Cooperative Library Agencies (ASGCLA)
- Approved, authorization of a new division of Core: Leadership, Infrastructure, Futures as a division of the American Library Association
- Approved, resolution on Protecting Privacy and Safety in Coronavirus-related Library Policy

- Approved, resolution Condemning Police Violence Against Black, Indigenous, People of Color, Protesters, and Journalists
- Approved, resolution on Developing Library Security Policies in keeping with ALA Policy

Council Orientation – Tune in Tuesday

In the past, the Council Orientation Committee convened only two in-person orientation sessions at the Conference for new and returning Councilors. This year we commend the work of the Committee in providing a series of informational web events centered around effectively onboarding Council.

Resolutions Committee

In the effort toward responsiveness and agility, pleased to report that the Resolutions Committee announced the new process in submitting resolutions year-round versus twice a year. The updated process will have a cascading effect on overall governance and association business.

Other Committees/Workgroups

The ALA Governance Office staffs many governance committees that continue the good work of the Association. Committees/working groups to highlight are:

- Forward Together Working Group held a series of listening sessions throughout the year to gather feedback from members on various topics in Forward Together. The workgroup will coalesce and review this information to guide Council in making updated recommendations.
- Operating Agreement Workgroup continues to hold monthly meetings since July 2020, to examine how the existing Operating Agreement is fulfilling the mission and values of the association as well as the financial structure that supports the joint and individual goals of the Association and Divisions and the relationship between ALA and the Roundtables. The workgroup established a [microsite](#) that features reports and background documents and a collection of meeting agendas and minutes.
- The Governance Office increased staff liaison training and engagement in an effort to promote more robust committee participation and effectiveness.

Future Activities:

- **Policy Monitoring Committee and Constitution and Bylaws Committee:** After sunseting of the Midwinter Meeting in 2022, current governing documents will need to be reviewed and possibly changed to reflect the future operations of Council.
- **ALA Affiliates Program:** Since the infancy of the ALA Affiliates Program, the list of benefits and fees remained relatively the same and has not accounted for inflation. As we continue to support our Affiliate groups, the current program, benefits, and affiliate fees are being reviewed to ensure the program and services are still relevant, valued, and sustainable. A recommendation will be brought forward to the Executive Board for consideration and approval.
- **Forward Together Resolutions Working Group:** The formation of the FT-RWG is underway and most of the work in the next 6 months is critical to the future governance of ALA, as resolutions will be brought to Council for consideration of changes to ALA’s Governance structure.
- **Drafting ALA Bylaws:** Per the Forward Together resolutions, drafting of new set of bylaws will be forthcoming.

INFORMATION TECHNOLOGY (IT)

Unit Manager: Sherri Vanyek

Budget Amount: \$3,162,709

Staff: 7

Revenue Stream(s) the Unit Supports: Conference Services; Continuing Education; Contributed Revenue; Membership; Publishing

Managing Priorities, Preparing for Change

Our current IT staff is focused on keeping operations going and project execution as time allows based on priority. The original Technology Investment Plan called for 15 IT positions and today there are only 7. As a result, IT is struggling to decrease our technology debt while trying to keep the day-to-day operations going. Replacing outdated technology will require investment, time, and additional resources. IT has requested additional investment dollars and 4 new positions in FY 2022 to focus on project work and reducing technology debt. Further, three additional resources will be required to make IT a revenue producing unit as called for in the ALA's Pivot plan. A business intelligence analyst is needed to assist with creating and managing data dashboards. A business Intelligence Administrator is needed to buildout, manage, and maintain a data warehouse or data lake. A data content analyst is needed to repackage content to sell. Failure to obtain more IT resources will result in not having the bandwidth to meet the association's goals.

Business Intelligence data dashboards will be defined, developed, and rolled out across the association to monitor unit-specific goals as well as those articulated by the Pivot strategy. IT has evaluated several products and selected the Power BI tool. Data dashboards will help units track trends and modify strategies in real time to improve revenue. The Pivot Plan calls for additional revenue for Continuing Education (CE). An updated Learning Management System and eLearning eCommerce system in FY 2021/FY 2022 will be needed to accomplish this. Other associations have invested significant resources in this area because of the increased need to do virtual conferences due to the Pandemic.

iMIS is our current Association Management System (AMS) for our membership database which contains dues, donations, subscriptions, orders, and committee volunteer activity records. An iMIS upgrade in FY 2022 provides us with additional time to figure out the best long term AMS solution. It also provides us the opportunity to simplify our complex business rules (i.e. New Membership Dues Model implementation). The iMIS system is heavily integrated with approximately 25 other systems. These systems exist both in our internal and external infrastructure (cloud-based). Due to its size and complexity, replacing the AMS is a multi-year project requiring an assessment, RFP, vendor selection, and implementation.

When we moved to the new headquarters office, we anticipated moving most of our infrastructure to the cloud. However, there was not enough time, resources, or money to move approximately 140 virtual servers and infrastructure to the cloud for the move. Instead it was decided to reduce the footprint at the new headquarters office and contract with a co-location facility for approximately two years to house our internal infrastructure. This DCAas design project in FY 2022 will lay out the plan to move the co-location services to the cloud as originally planned. Moving to the cloud will reduce the likelihood of network and server outages, will enable us to host our servers and network infrastructure offsite instead of paying for and maintaining our own, will provide 24/7/365 support without requiring costly overtime charges from consultants, will free up IT staff time for projects, and will allow staff to access the datacenter, view their dashboards, and run reports from anywhere at any time.

Our support for our version of Drupal (our Web Content Management System) for the main ala.org website and Drupal commerce sites ends in November 2021, which is FY 2022 for ALA. These upgrades will buy us time to move or replace these applications going forward and are necessary to provide security updates so the systems will not be breached.

Our Content Management System (CMS) and Website Strategy Assessment in FY 2022 will guide us in replacing or upgrading our main ala.org Drupal Web Content Management System to create the ability to organize content by topic with a focus on our external audience instead of organizing content by ALA's internal structure.

Key Activities:

The association is migrating its Sympa lists to the ALA Connect online community platform. The platform functions as a list serve, discussion, and document sharing platform. The migrations are scheduled to be completed in August 2021. The WordPress Blogs are being migrated to a new hosting company that will provide support and security updates.

A limited number of Business Intelligence data dashboards will be defined, developed, and rolled out across the association to monitor unit-specific goals as well as those articulated by the Pivot strategy. IT has evaluated several products and selected the Power BI tool. The data dashboards will help units track trends and modify strategies in real time to improve revenue. A Project Fact Sheet was developed to accompany the project status reports. The reports will be made available to staff via the support website.

All laptops are being reimaged to the latest version of Windows 10 with software updates. ShareFile was introduced to the units for transferring secure documents. Citrix remote communication servers were expanded to support remote access to applications for staff. Work is ongoing to turn on https (SSL) on the main ala.org websites.

Future Activities and Events Through End of Quarter:

- The association is migrating its Sympa lists to the ALA Connect online community platform. The platform functions as a list serve, discussion, and document sharing platform. The migrations are scheduled to be completed in August 2021.
- The WordPress Blogs are being migrated to a new hosting company that will provide support and security updates.
- A Business Intelligence dashboard will be defined, developed, and rolled out across the association to monitor unit-specific goals as well as those articulated by the Pivot strategy. IT has evaluated several products and selected the Power BI tool. The data dashboards will help units track trends and modify strategies in real time to improve revenue.
- A new VPN is being rolled out to replace the Citrix communication servers to allow staff to access remote applications.

INTERNATIONAL RELATIONS OFFICE

Unit Manager: Michael Dowling

Budget Amount: \$264,335

Staff: 1.5

Revenue Stream(s) the Unit Supports: Conference Services; Continuing Education; Contributed Revenue; Membership

International Membership

The global COVID pandemic and financial stress has impacted librarians around the world and is a major contributor to the drop in ALA members outside the U.S. by 9% from last year (1,756 to 1,638). More than half from Canada but ALA members still in 96 countries. Continued financial stress through 2021/22 challenges international members to continue ALA membership. Proposed restructuring of ALA membership categories would reduce personal international memberships which could make it attractive to more. Creating more institutional member benefits (staff attending ALA CE at member rate) can encourage more international organization members. Providing discounts to ALA institutional members for subscriptions to ALA products such as Choice and Booklist could encourage more members. Responsive bundling of ALA membership with attendance at ALA events (Annual, LiblearnX, ACRL, PLA, AASL). New ALA eLearning can provide combined marketing of multiple CE events to targeted international audiences.

International Product Purchases

Global financial stress has reduced purchases of ALA products outside the United States as it has done within.

Virtual events such as Midwinter and Annual result in reduced revenue through international registrations. Current distribution and payment challenges make it difficult for many markets to easily order and pay for ALA products and services. However, increased virtual activity that allow anyone around the world to participate in ALA webinars and events means more eyes on ALA services who can be turned into members or paying customers. IRO shares the goal of creating combined integrated database (Salesforce) of all ALA international contacts/members/customers. Revamped distribution and access to ease ordering and acquisition should increase purchases around the world.

Key Activities:

- **Sharjah International Conference/Forum** – IRO worked with the Sharjah International Book Fair and the Combined Book Exhibit, to pivot in September from a planned in-person conference to a virtual forum. The Sharjah Virtual International Library Forum expanded the normal regional event to a global one with 956 registrants (830 librarians and 126 exhibitor staff) from 52 countries. Registration was free of charge this year. Over 550 participated live over the course of the three-day event November 10-12. Overdrive was the Gold Sponsor. ALA President Julius Jefferson keynoted the Forum. Making the Forum free will reduce budgeted revenue by around \$5,000, but added new connections for ALA.
- **International Webinars** – IRO working in collaboration with the IRRT and IFLA hosted six international focused webinars in the fall. Some such as ALA-IFLA “Going from disaster to wonder - managing successful teams” and “International Work and Projects During COVID-19” provided knowledge and insight during these challenging times, while others provided information on international activities, “Reaching national impact in Kenya and Namibia: EIFL’s strategy for public library development.” The total registration for these webinars was 728 with 479 attending the session in person, with others then watching the recording when convenient for their time zone.
- **ALA IFLA Nominations** – IRO and IRC worked with multiple units of ALA to solicit and bring forward recommended members to the Executive Board to be nominated for IFLA Section Committees for 2021-2025.
- **IFLA Governance** – IRO Director Dowling has continued to serve on the IFLA Governing Board as it moves forward on its governance restructuring. A vote to modify IFLA’s governance will be on February 12. ALA President Julius Jefferson is the voting representative for ALA. The main recommended changes are to a smaller Governing Board (from 19 to 11), and elected treasurer, and adding more regional committees to help raise the visibility and engagement of library communities around the world with IFLA. There would be a new North American Regional Committee of up to 20 members from the U.S. and Canada (Mexico is part of the Latin American and Caribbean region.) The six regional committee chairs would form a new Regional Council with its chair serving on the Governing Board.
- **ALA UN Sustainable Development Task Force** – The ten-member task force chaired of Past-President Loida Garcia Febo partnered with the National Library of the Philippines, The Philippine Librarian Association Inc. (PLAI) to present "Philippine Libraries and Their Roles in the United Nations SDGs" on November 20. Registration exceeded 800. The Task Force added new resources for all types of libraries to highlight their activities related to the UN SDG’s. A Word version of the chart originally created by the Los Angeles Public Library can be used by libraries to copy in their activities to any of the seventeen SDG’s for display and promotion.

MEMBERSHIP RELATIONS & SERVICES

Unit Manager: Melissa Walling

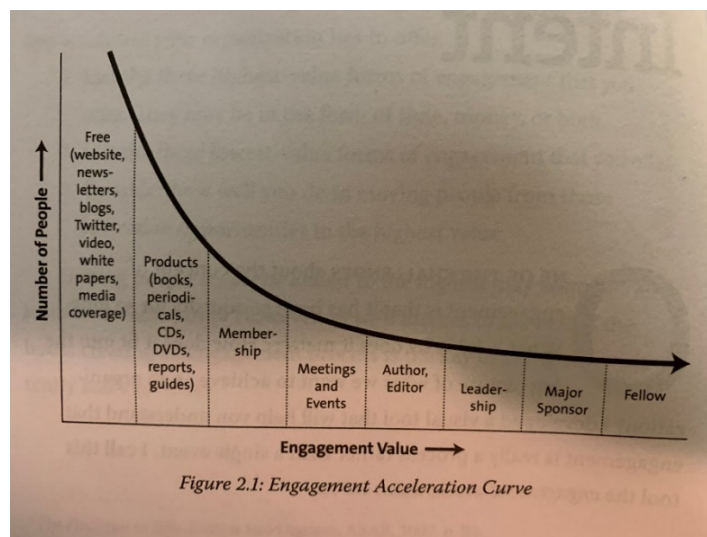
Budget: \$3,060,882

Staff: 7

Revenue Stream(s) the Unit Supports: Membership

Environmental Scan:

The pandemic has created some opportunities for membership and many associations pivoted, as we did, to providing information to the entire industry – not only members. This “Open Garden” approach instead of a “Walled Garden” approach resulted in high number of individuals engaging with our online learning, our content and our COVID recovery website. This was a great way to build affinity for the organization without requiring a financial investment on behalf of the attendee/customer. Analyzing the data of who attended these webinars or visited the recovery website could uncover that we have started (or rekindled) relationships with a number of library workers. The challenge facing all associations now is - how do we convert all these individuals within the “Open Garden” into members and ultimately drive revenue for the association. The concept of the engagement curve was introduced in 2011 by C. David Gammell, CAE in the book Maximum Engagement. This book outlines how associations can move “members, customers, and donors to ever-increasing levels of participation.” The basic concept is that associations have a large number of individuals who engage with the association in a low threshold manner. This would include those who engaged with our pandemic activities noted above, and also those who are followers on social media or even job seekers. ALA’s job is to keep fostering relationships with these individuals and supporting them to take the next step in the membership journey. Here is an example from the book:



New program support will help us focus on building the member journey along the engagement curve – and creating communications to encourage customers along the curve towards membership. This will allow us to open the door for building these engagement pathways and operationalizing our recruitment strategies. A dedicated focus on recruitment will be required to convert these individuals to members of ALA. These activities can be automated when the Informz account merger concludes so that these communications run automatically based on the activities someone engages in. We are finding ways to do ad hoc recruitment but that will not get us to accomplish the goals outlined in the Pivot Strategy.

Pivot Strategy Reflection:

There is significant expectation of growth starting in FY 2023. Eighteen percent market share is 70,000 members – bigger than we have ever been in ALA history. Sixteen percent of those engaging within a division is also about 10,000

additional memberships. These are very ambitious goals, but I believe we have the right tools to make an impact. Achievement of these goals will require a focus on retention of current membership and recruitment of non-members.

- **Communicating the value** that is being delivered to members and working across the organization to define and articulate member benefits.
- **Membership renewals** remain on track and these communications continue to highlight the semi-annual installment payments and the non-salaried membership price as members need flexibility when their employment outlook may be uncertain. We activated a new postcard reminder in December which was well received.
- A cross-organizational team is continuing work on developing a 12-month **membership onboarding campaign to include** emails, videos, virtual meet ups, and web pages to ensure that our new members learn about everything ALA membership can offer. Demonstrating the value proposition of membership is always important, and even more so during this economic downturn.
- The Mellon grant will allow us to bring additional resources to focus on **engagement and recruitment** which will be critical to success. We are also starting conversation with internal stakeholders about membership data and what data we should be collecting to help connect our members with resources and tools based on their interests and needs.

Member and Stakeholder Reach

- ALA's membership is at a 7% decline from 2019 and an 8% decline when compared to the same time in 2018. In December, our ALA membership counts usually decrease by approximately 300-500 members. It was a bit of good news to see a less than normal decrease of only 127 members (-0.2%).
- Division memberships currently totals 44,155 which is a slight decrease from last month. All divisions experienced a decline in membership ranging from 0.3% - 2.7% when comparing November to December. We cannot do year over year comparisons because of the Core merger.
- Round table memberships currently total 18,018 which is a slight increase from last month as well as an increase when compared to December 2019. There were eight round tables that help steady or increased their membership with FMRT growing 3.5%, NMRT growing 3% and RMRT growing by 2.5%.
- ALA's recent membership trend has been to see a decline in our Regular Members, and an increase in our Student Members. These trends have continued over the past year, and we expect them to continue. We are excited to see such growth and engagement in our Student Members, especially through our joint student membership program that we manage with ALA chapters; however, conversion of these Student Members to Regular Members will be essential to our long term success as an organization. Retaining Regular Members, our largest and highest paying personal membership category, is imperative.

Key Activities

- The most impactful activity this quarter has been our team's focus on membership renewals. While this is part of our normal business, this quarter has proved especially challenging due to the changes in accounting.
- In July, we resumed our renewal activities via email and it quickly became apparent that ALA had received a number of membership payments that had not been applied to members' records. This is because approximately 35% of our membership dues payments are not made online, which means that accounting needs to prepare and identify these payments for MRS to apply. This has proved no small task this year. Knowing the challenges facing our accounting unit, the Customer Service team identified and activated strategies that allowed us to bring revenue into this organization quickly and efficiently. Their innovation and dedication helped us deliver quality customer service, minimize member frustration with our accounting delays and drive revenue. Their work allowed us to resume collections and we are as close to our normal practice as we can be until accounting is back on track.
- Since April, we have collected \$2.6M in dues revenue which will be distributed across FY 2020, FY 2021, and FY 2022. While we projected a decline in revenue this year, if we had waited until accounting could provide us with

their usual level of service, we would've missed opportunities to capture this revenue. I'm very proud of the commitment the team made to our members during this challenging time internally.

- MRS typically sends 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).
- MRS 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.

Keeping members is always easier than capturing new ones, so our retention activities remain a top priority year-round. Late Q1 and all of Q2 are our busiest times of year with renewals as well. Our team has continued our focus on efficiencies and streamlining processes as we enter our busy season with only 70% of the staff that we had last year.

Select Future Activities and Events Through End of Quarter:

The second quarter is our busiest time of year in the Customer Service Center. Not only are the bulk of membership renewals taking place from November – February but all subscriptions that we support are up for renewal in December. This means that our reduced staff in Customer Service is focused entirely on supporting renewals.

- A virtual Midwinter is also creating an opportunity for our unit to host virtual member meet ups. In coordination with our student chapters, we are hosting a Student Member meet up and the Membership Committee is hosting a general membership meet up. NMRT is an expert at hosting orientation at conferences and we are supporting their event as our new member touch point. Our instinct is that our members will enjoy the virtual/casual networking opportunities and we expect to incorporate these events into our year-round calendar. Midwinter is a great platform to pilot these for our unit.
- An exciting project we are working on this quarter is the membership onboarding project. This is project we are working on in conjunction with CMO that we expect to launch in late spring, 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.

OFFICE FOR ACCREDITATION

Unit Manager: Karen L. O'Brien

Budget Amount: \$227,073

Staff: 2

Revenue Stream(s) the Unit Supports: Contributed Revenue; Membership

Rising ideas, practices, conditions for unit and constituencies:

OA is 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. Accreditation Working Group is making good progress with its analysis. 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.

Key Activities

- Published Fall 2020 of semiannual *Prism* newsletter
http://www.ala.org/aboutala/offices/accreditation/prp/prism/prism_current

- Oriented five new members (of the 12 total members) of the Committee on Accreditation
- Trained 65 members of the external reviewer pool for appointment to panels

Select Future Activities and Events Through End of Quarter:

- Spring Edition of Prism to be published April 15, 2021
- Spring CoA meeting on April 22, 2021 responding to each program's statistical
- [Special Reports and Biennial Narrative Reports](#)
- Conduct advanced reviewer training program on March 25, 2021 to prepare chairs for leading external panels

OFFICE FOR DIVERSITY, LITERACY AND OUTREACH SERVICES

Unit Manager: Kristin Lahurd, Interim Director

Budget Amount: -\$415,646

Staff: 5

Revenue Stream(s) the Unit Supports: Conference Services; Continuing Education; Contributed Revenue; Membership

An Imperative Opportunity

Two interrelated issues present both a pressing need and an imperative opportunity: the movement for racial justice and the diversification of the library profession, with a focus on both recruitment and retention. As news outlets summed it up, 2020 was "[the year America confronted racism](#)". Nicole Chavez writes for CNN: "the Covid-19 pandemic, which many had considered a 'great equalizer,' paralyzed the world and Black, Latino and Native American communities were among the hardest hit. Racist attacks against Asians in the US were also on the rise. Jogging, bird-watching or calling 911 while Black felt dangerous and George Floyd's killing by a police officer shook Americans out of whatever made them numb to racism and police brutality. No matter where you turned, you couldn't ignore reality. America was the epicenter of a racial reckoning."

And yet, for many institutions, confronting racism has taken shape in largely symbolic ways, often in the form of anti-racism statements or in renaming to remove Confederate connections. While statements can be key to organizations taking a clear, public stance and commitment, they themselves do not effect change, do not do the work of dismantling systems of oppression. This is the work of individuals, and it requires a commitment to surfacing and confronting the barriers, inequities, and power structures that include and privilege some and exclude others.

Likewise, diversification of the profession requires not only recruiting more people of color and other underrepresented groups to the profession but also addressing systems of oppression that drive people away from the profession—a dual approach that underscores our framework of social justice as both a goal and a process. As [Twanna Hodge and Jamia Williams write in *American Libraries*](#), "Librarianship is an overwhelmingly white profession, with most of its racial and ethnic diversity existing in paraprofessional, precarious, and part-time positions. As two early-career Black women with experience in multiple academic and health sciences libraries, we have experienced many barriers to existing and thriving in librarianship: tokenism, racial battle fatigue, cultural taxation, and emotional labor." Indeed, for too many Black, Indigenous, and People of Color (BIPOC) in librarianship who do stay in the profession, it is *in spite of* their experiences not because of them. At the same time, BIPOC library workers have expressed a struggle to find their place in ALA, pointing to a lack of visibility and pervasive microaggressions, and many are engaging more in grassroots efforts like [wehere](#).

Thus, it is in the areas of recruitment and retention, within a truly anti-racist, social justice model, that we have a responsibility to our members and to the profession as well as great potential for impact. And this applies not only to the institution of librarianship but to ALA as an institution. In terms of impact streams, direct opportunities lie in Continuing Education and Data and Research. We know that Continuing Education (CE) plays a clear role in opportunities for career mobility and leadership, generally; but CE related to equity, diversity and inclusion (EDI)—grounded in data and research – can play a key role in fostering a more equitable, inclusive profession. ALA has the opportunity to be the

leader in data-driven recruitment and retention to really move the needle in diversifying the profession in a sustainable way. At this point, we are reliant on external data sources, such as [Library Workers: Facts and Figures, AFL-CIO Department for Professional Employees, 2020](#), to confirm what we know is a persistent lack of racial and ethnic diversity. An updated Diversity Counts and a robust retention study, led by ALA, could have great reach and impact, bolstering support for our existing initiatives like Spectrum, channeling new funding opportunities and initiatives, and creating pathways for entry into the profession beyond the MLIS. Without an Office for Research and Statistics or similar structure, we are constrained in our capacity, but we have networks to leverage, including the National Associations for Librarians of Color, with a vested interest in and commitment to this work.

Greater coordination through the cross-functional teams and the new eLearning unit should facilitate ALA's leadership in Continuing Education as well. We have an opportunity to be seen as a go-to, critical space for conversations about attrition and retention and to join our peer associations who are providing these spaces (see: [ASERL's series Why I Left the Library Profession? - DEI Perspective](#)," ["Equity, Diversity, and Inclusion in Libraries: Progress and Promise"](#) from AMIGOS, and Denver PL's [Advancing Racial Equity and Inclusion in the Workplace Symposium](#)). We need clearer pathways for members to contribute content and for the process to be more nimble, responsive, and member led. All of these efforts – a national retention study, diversifying the profession through new pathways, EDI Continuing Education grounded in data and research – could contribute to the charge of an ALA Retention Task Force.

Member and Stakeholder Reach

Total: 8,324

Members = 5,727

Non-members = 350

Combined members and non-members* = 2,247

ODLOS liaises and coordinates activities with five ALA committees and their subcommittees, the EDI Assembly, three roundtables, seven interest groups, and nine affiliate organizations – including the National Associations of Librarians of Color (NALCO's) – in support of the goals of the ALA Strategic Direction on Equity, Diversity, and Inclusion and ODLOS's mission to create an association culture in which social justice is part of everybody's everyday work. ALA recognizes that its reach and impact require broad coalitions and a leadership commitment to EDI. To that end, ODLOS offers training of ALA's Council and Executive Board to provide an overview of initiatives across the association and develop a shared understanding of social justice. At the same time, the Office's robust continuing education portfolio – including workshops, webinars, and consultations – advances the broader profession's understanding of equity, diversity, inclusion, and social justice, with topics such as implicit bias, microaggressions, and privilege.

Through our member-led, free continuing education and resources like the [EDI Speakers Bureau](#), ODLOS centers diverse voices and enacts the commitment to ameliorating underrepresentation within the Association and the communities served by libraries. The Spectrum Scholarship pairs financial assistance with leadership development resources and community-building to address barriers to the recruitment and retention of BIPOC in LIS. Finally, through ongoing partnerships within and outside of the Association, such as the [Building Cultural Proficiencies for Racial Equity Task Force](#), ODLOS furthers our reach in supporting library and information science workers in creating responsible and all-inclusive spaces that serve and represent the entire community.

Key Activities

- In our continuing education efforts, the most significant undertaking – and success – during this first quarter was adapting our flagship training, ["EDIcon: Foundations of Equity, Diversity, and Inclusion"](#), from a half-day in-person training normally facilitated at conferences or staff in-service days to a series of three consecutive 1.5-hour virtual trainings. Starting in November and continuing through January, and in partnership with the Chapter Relations Office, we are facilitating this training for two groups, the NASA @ your Library team with the Space Science Institute and the San Mateo County Libraries. Our training portfolio also includes a series of "EDI Essentials" and individual sessions, such as "Implicit Bias," which we facilitated for the Kentucky Department for

Libraries and Archives in October. This quarter we trained more than 330 library workers, with more viewing the archive of the session.

- [Libraries Respond](#) continues to be a valuable resource for library workers at large. In this quarter, the Libraries Respond homepage received 6,170 pageviews; the top three pages were Drag Queen Story Hour; Immigrants, Refugees, and Asylum Seekers; and Combating Xenophobia and Fake News in Light of COVID-19.
- In September, ODLOS submitted a proposal to a funder who wishes to remain anonymous which has resulted in a \$170,000 grant in November that is providing an additional 20 scholarships as part of the 2020-2021 Spectrum Cohort. Recipients will join their cohort/be announced in January 2021.
- As part of the Community Catalysts project category of the Laura Bush 21st Century Librarian Program, ODLOS submitted a preliminary proposal in October to IMLS to fund another round of Spectrum Doctoral Fellowships. If invited by IMLS, ODLOS will submit a full proposal in February to fund 10 Spectrum Doctoral Fellowships and begin its support of a cohort of future LIS faculty committed to fostering racial equity through teaching and research. The grant would also involve building partnership models among degree programs to support new course development and cross-listing of courses in a social justice curriculum.
- Spectrum added the [BIPOC in LIS Resource Center](#) to its website which seeks to capture all of the support mechanisms routinely shared by Spectrum community members in our discussions and mentoring of one another more broadly with BIPOC professionals. The site includes graduate education funding, mentoring and professional development opportunities, online community spaces for BIPOC professionals, and social media accounts to follow.
- A strategic focus for ODLOS in 2020 was to facilitate opportunities for collaboration among ALA member groups, units, and affiliates to further the Association's and members' goals around Advocacy, Professional and Leadership Development, and Equity, Diversity, and Inclusion. A key initiative toward this goal has been a series of webinars with the National Associations of Librarians of Color and our "outreach" affiliates to highlight their work and to explore possibilities for new partnerships. In this quarter, we hosted two webinars with the affiliate organizations: "The American Indian Youth Literature Awards: Discussion and Reflection" with the American Indian Library Association and "Out-Doing Outreach in a COVID-19 World" with the Association of Bookmobile and Outreach Services.
- The [Building Cultural Proficiencies for Racial Equity Framework Task Force](#), a joint initiative of ALA (specifically the Association of College and Research Libraries, the Public Library Association, and ODLOS) and the Association of Research Libraries, continues the work of its charge: to create a framework for cultural proficiencies in racial equity that can be used in public and academic libraries through: scanning the environment, including review of relevant documents to identify literature and similar statements and frameworks related to racial equity; drafting the framework; seeking comment from stakeholders and the library community on the draft, and revising as needed. Two members of the task force, Kristyn Caragher and Tatiana Bryant, went through IRB at the University of Illinois at Chicago (UIC) and University of California Irvine (UCI), respectively, and released their "Racial Equity Task Force Survey" to assess public and academic libraries' racial equity efforts, employees' perceptions of those efforts, and employees' experience with racial equity and inequity within their library. Project facilitator Katherine Skinner convened the first of three working sessions (using a logic model process to develop the draft framework) on November 9.
- In September, with the dissolution of the Association of Specialized, Government, and Cooperative Library Agencies (ASGCLA), ODLOS welcomed the following interest groups: Bridging Deaf Cultures; Consumer Health Information Librarians; Library Services for Dementia/Alzheimer's; Library Services for the Incarcerated and Detained; Library Services to Persons with Print Disabilities; Tribal Librarians; and Universal Access. Each of these groups has a purpose that closely aligns with the ODLOS mission, and their work expands the Office's scope and emphasis on EDI, outreach, and engagement. Shuntai Sykes, Membership and Programs Specialist, joined ODLOS in September in a part-time position, serving as primary staff liaison for the interest groups.

Select Future Activities and Events Through End of Quarter:

- During the second quarter, we will facilitate 8 virtual trainings, including “EDIcon” and “Facilitating Critical Conversations” for the NASA @ your Library team; “Implicit Bias” and “Microaggressions” for the State Library of North Carolina; and “Implicit Bias” and “Privilege” for the San Mateo County Libraries.
- Also, in the second quarter, ODLIS is holding a virtual meet-and-greet for our new interest groups as an opportunity to get to know the OLDOS staff and learn about our projects, other member groups, and resources and to explore opportunities for collaboration.
- In December, we launch EDI & Social Justice Opportunities for Library Workers, a list of equity, diversity, and inclusion opportunities that are geared toward the LIS profession.
- During the second quarter ODLIS is organizing key events for the Midwinter Virtual Meeting:
- An experiential learning session on microaggressions in libraries, envisioned and sponsored by ALA President Julius C. Jefferson, Jr. and coordinated by ODLIS. This live session, a LibLearnX preview, is intended to be the first in a series of experiential equity, diversity, and inclusion sessions. It will be hosted by ALA President Jefferson and moderated by Alanna Aiko Moore, Past President of APALA, with breakout conversations facilitated by member leaders, including significant representation from ALA President Jefferson’s Advisory Committee.
- The 22nd Annual Dr. Martin Luther King, Jr. Holiday Observance and Sunrise Celebration will be held as a prerecorded program. The Celebration will feature a keynote address by Dr. V.P. Franklin, Distinguished Professor Emeritus of History and Education at the University of California, Riverside, and a Call to Action by the 14th Librarian of Congress, Dr. Carla Hayden.

OFFICE FOR INTELLECTUAL FREEDOM

Unit Manager: Deborah Caldwell-Stone

Budget Amount: \$434,504

Staff: 4

Revenue Stream(s) the Unit Supports: Continuing Education; Contributed Revenue; Membership; Publishing

The Office for Intellectual Freedom is monitoring several trends that threaten libraries' ability to provide diverse resources and ensure equitable and inclusive access to information for all members of the community. These include:

- Organized challenges to diverse materials and programming, brought by local groups supported by national organizations.
- State and local legislation intended to penalize libraries and library workers who select and provide diverse materials that these groups say are unsuitable for minors because the materials address LGBTQIA+ concerns or racial injustice.
- Organized advocacy by national organizations that is critical of ALA's core values and professional best practices intended to promote intellectual freedom; equity, diversity, and inclusion; and social justice.

OIF provides direct support and counsel to librarians and libraries addressing these challenges in their communities. We also work with other ALA units to provide guidance and support to state associations and other state and local advocates who fight censorship and defend access to diverse materials. While libraries and advocates often defeat these challenges, the censors' organized campaigns have become a persistent and ongoing threat that is now expanding to other states and communities. There is a need for a sustained advocacy campaign that identifies the false claims underlying these attempts to censor diverse materials, highlights the value of intellectual freedom, and promotes local libraries as welcoming and inclusive community institutions.

- Review of ALA's frequently banned and challenged book lists over the years shows that attempts to remove books and other resources from libraries and classrooms are now focused entirely on materials written for or provided to young people. This limited pool of challenges has fostered an unlikely competition among free expression advocacy groups: OIF now competes with the National Coalition Against Censorship and PEN America to provide challenge support to libraries and library workers and to serve as a collection point for censorship reports. We are carefully evaluating the impact of this development on OIF's ongoing data collection activities, member engagement, and fundraising opportunities.
- There is an ongoing conversation within the profession about the perceived conflict between the core values of intellectual freedom and social justice. OIF is working with the Intellectual Freedom Committee to develop messaging to reframe the conversation and to demonstrate that intellectual freedom and social justice are complementary principles that reinforce each other and are mutually dependent. Both are necessary to achieve inclusion, equity, and justice for all persons.
- After large technology companies removed Donald Trump from their social media platforms and denied hosting services to the Parler chat platform in the wake of the January 6th riot and insurrection at the U.S. Capitol, OIF received a number of communications from librarians and the public asking if ALA intended to address corporate decisions they equated with censorship. While a private corporation's decision on whether or not to host or publish content is not a First Amendment concern, such actions involve complex issues that should not be taken lightly, especially in light of these companies' power to moderate and direct the country's online discourse. These concerns are being taken up by the Intellectual Freedom Committee. These events can provide an opportunity for ALA members to participate in the larger discussion about corporate power over online discourse.

Member and Stakeholder Reach

- OIF provided support and consultation in 53 challenges or censorship cases.
- OIF's staff met regularly throughout the quarter with members of the Intellectual Freedom Committee, the IFC Privacy Subcommittee, the Committee on Professional Ethics, the Intellectual Freedom Roundtable, and the Freedom to Read Foundation. It also hosted a meeting for the 64 representatives to the State Intellectual Freedom Network (SIFNet) and met with the editorial board of the *Journal for Intellectual Freedom and Privacy*.
- 183 persons registered to attend or view the recording of "Surveillance in Academic Libraries?! A Search for Better Ideas," a privacy town hall hosted by OIF and the IFC Privacy Subcommittee. 160 registrants attended the live event.
- OIF's "Free Downloads" webpage for Banned Books Week attracted 30,720 page views.
- There are 2,830 subscribers to the weekly OIF Newsletter.
- Between October 1 and December 31, OIF's blog garnered 57,621 page views.

Most Impactful Unit Activities this Quarter:

- [Publication of the 10th edition of the Intellectual Freedom Manual](#), now available from the [ALA Store](#).
- Publication of Vol. 5, No. 1 of the [Journal of Intellectual Freedom and Privacy](#).
- "[Surveillance in Academic Libraries?! A Search for Better Ideas](#)," a privacy town hall hosted by the IFC Privacy Subcommittee on December 1.
- On October 20, OIF Director Deborah Caldwell-Stone discussed intellectual freedom in the school library and the United States' approach to free expression with the students enrolled in the "Children's Media and Librarianship" course at Oslo Metropolitan University in Norway.
- Caldwell-Stone joined Freedom to Read Foundation General Counsel Theresa Chmara on October 21st to present "Intellectual Freedom and the Law: Social Media, First Amendment Audits and the Library as a Public Forum," at the 2020 Virtual Annual Meeting of the Pennsylvania Library Association.
- In November, OIF Assistant Director Kristin Pekoll joined IFRT members in a virtual discussion of her 2019 book *Beyond Banned Books: Defending Intellectual Freedom Throughout Your Library*, published by ALA Editions.

- OIF partnered with Development, Membership, CMO, and FTRF to launch a novel fundraising partnership with Humble Bundle, a company that raises funds for charities and nonprofits through the sale of video games, e-books, and other media via a pay-what-you-want model. Between November 10 and February 8, [ALA and Humble Bundle are offering a one-of-a-kind e-book collection called “Be the Change”](#) that features books by authors and creators of color. Proceeds will benefit ALA, the Spectrum Scholars, and the Freedom to Read Foundation. Current proceeds to date are nearly \$70,000.

Advocacy and Policy Development

“[ALA Statement on Executive Order on Combating Race and Sex Stereotyping](#),” [was released](#) by the Executive Board on October 29, 2020. The Intellectual Freedom Committee drafted the statement for the consideration of the Executive Board. The statement responds to the White House Executive Order on Combating Race and Sex Stereotyping, which prohibits federal employees, contractors, and grant recipients from discussing or considering concepts such as critical race theory and white privilege as part of workplace diversity training

The Intellectual Freedom Committee approved the following guidelines and best practices, all available on the ALA website:

- [Library Privacy Guidelines for Students in K-12 Schools](#)
- [Library Privacy Checklist for Vendors](#)
- [Access to Digital Resources and Services Q&A](#)

The Office for Intellectual Freedom wrote to the members of Sullivan County School (PA) school board expressing support for an LGBTQIA+ display in the school library and praising the school librarian for her commitment to fostering an open, inclusive, and collaborative learning environment. The letter responded to a request for support after a school board member criticized the subject of the display and stated that it should be dismantled.

OIF also sent a letter to the superintendent of the Burbank Unified School District, urging him to retain five books in the curriculum that were challenged due to the books' use of racial epithets, even though many of the books are anti-racist or written by an African American author. The letter recommended improved diversity education and expanding the curriculum to include works by authors who are Black, Indigenous, or persons of color as an alternative to removing the five books from the list of works available for classroom instruction.

Banned Books Week

To kick-off Banned Books Week, OIF released the list of the [top 100 most banned and challenged books of the past decade](#), as well as an accompanying BuzzFeed quiz. The list was covered by major news outlets, including the Associated Press, CNN, *The Guardian*, and NBC News. OIF offered an array of online Banned Book Week resources, including [a detailed list of 40 virtual program ideas](#), the Dear Banned Author letter-writing campaign, #BannedBooksWeek in Action posts, and videos of [read-outs](#), [watch parties](#), and livestreams with banned author [Alex Gino](#) (organized by the Banned Books Week Coalition) and documentary director [Cody Meirick](#). The GNCRT, IFRT, and Image Comics also produced [a week-long webinar series](#) featuring conversations with creators and librarians. In addition, OIF offered ALA members new and exclusive access to [thousands of searchable public challenge entries](#)

Challenge Support

From June 1, 2020 to Dec. 29, 2020, OIF has tracked 75 unique cases involving censorship or privacy concerns or challenges to library policies. OIF provided support and consultation on 53 cases. The office has noted the following censorship trends:

- Challenges to anti-racist materials
- Challenges that involve Black Lives Matter
- Challenges publicly shared on social media

- Books - 50
- Graphic Novels - 5
- Films & Magazines - 3
- Programs - 4
- Displays - 3
- Social Media - 4
- Other (Databases, Filtering, Hate Crime, & Online Resources) -

PUBLIC POLICY AND ADVOCACY

Unit Manager: Kathi Kromer

Budget Amount:

Staff:

Revenue Stream(s) the Unit Supports: Membership

Keeping Libraries Front and Center in the Midst of Political Shift

As we approach the presidential inauguration on January 20 and ongoing impeachment process, libraries face competing priorities. The January 6 siege on Capitol Hill and continuing threats of violence will draw attention from other important issues facing libraries and the communities they serve. The new Congress and administration will be dealing with a worsening pandemic, along with extraordinary needs and demands from every sector of society.

- We anticipate the first 100 days of Biden administration will involve a high pace of activity. Neither major political party has a mandate, and with the margins being slim in both chambers, libraries need bipartisan cooperation to advance our public policy priorities.
- Like the federal government, state legislatures are facing deep budget cuts as well as a range of social issues that need to be addressed at the local and state level. Many states are also facing threats of violence related to the November 2020 election outcomes.
- Perceived competitors are facing the same challenges. Because they are smaller and more agile than ALA, it is easier for them to respond swiftly to crises.
- Moving forward, we cannot assume library, education, infrastructure, and workforce spending will be any easier in the 117th Congress.
- The security breaches on Capitol Hill will likely result in new protocols for in-person meetings. PPA is awaiting direction from the American Society of Association Executives, which has submitted a request to Hill for guidance on advocacy efforts moving forward.
- PPA has extended our strategic plan for continuity in these challenging times, as it was designed to allow us to respond to strategic opportunities.

Member and Stakeholder Reach

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

- ALA members and leaders, reached via
 - Three posts in The Scoop, one post on the PLA blog and two posts on the ACRL blog
 - Scores of posts on PPA, ALA and ALA division (incl. AASL, ACRL, PLA, UFL) social media accounts
 - Promotion of Census information through a dedicated newsletter, which closed in October
 - Contribution to fundraising efforts for the ALA Annual Fund campaign and on Giving Tuesday
- Library advocates (distinct from ALA members) via emails to through ALA's advocacy center: PPA has seen an increase in advocacy engagement with click-through rates significantly above industry standards.
- Library trade and other media, including a livestreamed post-election interview with Publishers Weekly

- Members of Congress
- Coalition partners
- Regular check-in meetings with other library organizations.

Key Activities:

- The advocacy efforts that started over the summer to push for library broadband funding in the next COVID relief package intensified in the last quarter of 2020, culminating in 36 hours of virtually round-the-clock collective action as PPA called on grassroots and grassroots advocates from key congressional districts. The goal was to keep the pressure on lawmakers to provide \$200 million to IMLS for libraries in expanded internet access through boosting Wi-fi signals or loaning internet capable devices such as hotspots. Libraries were also eligible for \$3.2 billion in funding slated for the FCC's E-rate program for similar purposes to support students and library patrons without home internet access. At the eleventh hour, library broadband funding was removed from the COVID relief provisions in the Consolidated Appropriations Act that was signed into law. While we were ultimately not successful, this hard work sets libraries up for action in the new Congress, as it is likely broadband will stay a hot topic with the new White House.
- Thanks to the work of ALA advocates, who faced-down the Administration's repeated [requests to eliminate funding](#) for LSTA, IAL and many other library-eligible programs, FY 2021 funding for the Library Services and Technology Act (LSTA) and Innovative Approaches to Literacy program received a [bump from Congress](#) for regular appropriations when the annual spending bill passed in late December, along with COVID relief funding, as part of an omnibus package. Library advocates were able to convince Congress to increase LSTA funding four straight years-an increase of \$22 million ([raising LSTA to \\$197.5 million](#)).
- On October 21, ALA hosted the pre-election webinar, [Advancing Your Library Agenda After Elections](#). The webinar included an all-star line-up of experts discussing strategies on how ALA members across the nation can use the months after the elections to help position the library agenda for success. ALA President Julius Jefferson moderated the panel which, included internet pioneer Larry Irving (credited with coining the 'digital divide'); Nikki Scarpitti, Director of Strategic Initiatives and Advocacy, Columbus Metropolitan Library; and Nick DeSarno, Director of Digital and Policy Communications, Public Affairs Council.
- As the transition between the 2020 elections and the start of the new Congress was a window of opportunity for library advocates to get to know new decision makers and get reacquainted with the ones reelected, in November PPA launched a web page: [A Transition Plan for Library Advocates](#). Along with the new web page, which included opportunities to Take Action, Stay Informed and Get Prepared for the 2021 legislative sessions, ALA issued an advocacy alert asking library advocates to show send a "congratulations" message to their elected leaders at every level and share how libraries serve their constituents and why libraries should be a priority.
- Legislation calling for \$2 billion in emergency library resources, the [Library Stabilization Fund Act](#), was introduced in the Senate by Sen. Jack Reed (D-RI), and in the House by Rep. Andy Levin (D-MI-09) in July 2020. The [legislation would provide](#) at least \$1.7 billion of emergency aid directly to state library agencies, \$45 million for Tribal libraries, and \$200 million in competitive grants related to COVID response. In response to an all-out effort by ALA members, the Senate bill secured 17 cosponsors while the House bill secured 68 cosponsors. PPA is working with Sen. Reed and Rep. Levin to reintroduce the legislation in 2021.
- On December 19, 2020, the Build America's Libraries Act (S. 5071) was introduced by Sen. Jack Reed (D-RI). The legislation would provide \$5 billion to repair and construct modern library facilities nationwide in underserved and disadvantaged communities. 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.

In addition to the standalone version of the Build America's Libraries Act, the same provisions were also included as part of the [Economic Justice Act](#) (S. 5065), which was introduced Dec. 18. The Economic Justice Act additionally creates programs that could be used to improve school and academic library facilities, provides \$12 billion in E-Rate funds for

libraries and schools to provide home internet connectivity, and ensures that tribal libraries are eligible to participate in the E-Rate program.

ALA is working with library champions in Congress to reintroduce a revised version in the 117th Congress.

Select Future Activities and Events Through End of Quarter:

- Numerous PPA panels at Midwinter, including advanced advocacy sessions and programs on the Libraries Build Business initiative.
- ALA kicks off our annual #FundLibraries campaign with release of President Biden's FY 2022 budget proposal.
- Dear Appropriations letter signing campaign.
- Possible release of several pieces of library-focused and potentially library-related legislation
- Highlighting 75th anniversary of PPA through online events and social media posts
- Small March event for strategic group of grasstops advocates

PUBLIC PROGRAMS OFFICE

Unit Manager: Deb Robertson

Budget Amount: \$289,271 (GF Admin); \$3,869,406 (Grants); \$289,341 (Donations and Earned Revenue)

of Staff: 10 (Eight of these staff members are supported via grant projects)

Revenue Stream(s) the Unit Supports: Contributed Revenue

National Library Programming Trends

Library programming across the country continues to be heavily impacted by the COVID-19 pandemic; many libraries moved to a virtual-only programming model in spring 2020 and continue to operate this way. The inability to host in-person programs has affected PPO's externally funded national programming initiatives, most notably the traveling exhibitions funded by the FINRA Foundation (Thinking Money for Kids) and the U.S. Holocaust Memorial Museum (Americans and the Holocaust). Exhibition partners and funders have been understanding, and PPO deputy directors worked with participating libraries to reschedule tours based on library needs. In some projects, PPO staffing budgets needed to be stretched over a greater period of time to accommodate lengthened tour schedules. PPO's roughly \$280,000 in funding from NEH CARES helped fill the gap; that funding ended December 31.

At the same time, PPO staff are seeing some opportunities arise. Due to a very negative forecast in the museum field — an estimated 33% are expected to be shuttered by the pandemic — the Smithsonian Institution Traveling Exhibition Services (SITES), the world's largest traveling exhibition service, has expressed a preliminary interest in partnering to bring exhibitions to libraries. PPO would likely collaborate with SITES to seek joint grant funding. We are watching this space and believe there is opportunity for post-pandemic libraries to become more active cultural hubs.

A shift facing PPO over the coming months will be to adjust to helping libraries return to in-person or hybrid programming as COVID cases wane. Throughout 2020 PPO was a leader in providing professional development and resources to help libraries make the necessary and rapid shift to virtual programming. Re-opening and providing safe programming options will again require PPO leadership.

Member and Stakeholder Reach

- Due to the often-federal funding model of 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.
- LTC: Focus on Small and Rural Libraries received more than 300 applications for the 200 available spots; all applicants were required to show membership in either ALA or the Association for Rural & Small Libraries (ARSL)
- 20,078 unique users visited PPO's Programming Librarian website in December 2020

- Membership in the Programming Librarian Facebook group has grown to more than 19,000 members

Key Activities:

PPO announced the first 200 recipients of its **Libraries Transforming Communities (LTC): Focus on Small and Rural Libraries** grants on January 5, while also inviting applications for a second funding round that will distribute an additional \$1.4 million to libraries. Up to 450 grants will be awarded in Round 2 of ALA’s community engagement funding initiative. Library workers may apply online for grant funding by March 4 at ala.org/LTCFocus.

Participating libraries will receive training in how to lead conversations, a skill vital to 21st-century librarianship. Library workers will complete a free ALA e-course on basic facilitation skills; host at least one conversation with community members on a chosen topic; and receive \$3,000 to support community engagement efforts. Grant funds may cover a range of expenses, including staff time and collections and technology purchases.

The first 200 grant recipients — public, academic, school, and tribal libraries — represent 43 states. Examples include:

- Stair District Library (Morenci, Michigan) will talk with residents about the recent loss of the community’s 150-year-old newspaper in a discussion series called Extra! Extra! Read All About It!...But Where?.
- Danville High School (Danville, Arkansas) will have an online conversation with students, school staff and residents about the importance of mask-wearing during the COVID-19 pandemic.
- Following a surge in suicides in their agricultural and mining town, staff at Duncan Public Library (Duncan, Arizona) will explore mental health through book and film talks and create an ongoing community support group called the Brain Support Brigade.
- Neligh Public Library (Neligh, Nebraska) will host online discussions about race for their predominantly white community. The series will kick off with a reading of a historical fiction title set in nearby Omaha after the 1919 lynching of African American resident Will Brown.

In September 2020, ALA announced plans to award nearly \$2 million to small and rural libraries in 2020 and 2021 to help them address issues of concern in their communities. Up to 650 U.S. libraries in small and rural communities will receive \$3,000 to tackle issues ranging from media literacy to COVID-19 safety to unemployment. The initiative is part of ALA’s longtime commitment to preparing library workers for the expanding role of libraries. LTC: Focus on Small and Rural Libraries is possible through the support of a private donor.

Other impactful PPO activities this quarter include:

- The announcement of 12 rural public libraries selected for the [STAR Net STEAM Equity Project](#)
- The release of an IMLS-funded practitioners’ guide and webinar series about [media literacy programming for adults](#)
- Applications are now open for the [Libraries Transform Communities Engagement Grant](#), a community engagement grant funded through seed money from past ALA president Nancy Kranich; the [Peggy Barber Tribute Grant](#), a new offering made possible by donations in Barber’s honor; and [the American Dream Literacy Initiative](#), offered with the Dollar General Literacy Foundation
- Publication of [“Ask Listen, Empower: Grounding Your Library Work in Community Engagement,”](#) edited by Mary Davis Fournier and Sarah Ostman, with a foreword by Executive Director Tracie Hall, in collaboration with ALA Editions.

Select Future Activities and Events Through End of Quarter:

- Onboarding for the first 200 LTC: Focus on Small and Rural Libraries grantees
- Kickoff of The Project to Address Diversity and Inclusion in Library Personal Finance Collections and Program: PPO is partnering with the Financial Industry Regulatory Authority (FINRA) Foundation to 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. The list will feature classic titles and new, contemporary, and current titles.

was approved in mid-December by the FINRA Foundation board. ALA will receive \$87,860 over nine months to support various project elements.

- Work with a task force of 12 library field leaders and research partner Knology to lay the groundwork for the creation of a curriculum for programming librarians; project is funded by an IMLS planning grant
- Publication of “Going Virtual: Programs and Insights from a Time of Crisis” by Sarah Ostman, in collaboration with ALA Editions
- Contracting with the Space Science Institute for Years 6-7 of the NASA @ My Library STEM programming initiative

PUBLISHING

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

Unit Manager: Mary Mackay

Budget Amount: FY 2021 Revenue: \$10,072,632/ Overhead: \$2,669,246/ Net \$416,153

Staff: 52

Revenue Stream(s) the Unit Supports: Publishing

Environmental Scan (Emergent Trends and Issues/Opportunities and Threats):

The market continues unpredictable in the face of the pandemic and the volatile environment as ongoing cuts are implemented in customers’ institutional and personal budgets. While we share and address ongoing challenges with the publishing and magazine industries, such as the preponderance of freely accessible content and the dwindling interest in print advertising, our greatest concern regarding FY 2021 revenue is the current state of the market in general. Overall, the new ALA Pivot Strategy is offering a framework for rethinking aspects of our work.

Emerging as a pattern since September is an exceptionally high returns ratio from book distributors. Anecdotally, book publishers in our space appear to be sharing our experience of fewer purchases, slow adoption of ebooks in the professional environment, and the turmoil in higher education that has included unexpectedly high returns of textbooks. ALA Editions/Neal-Schuman currently shows a 12% gap in revenue (partly mitigated by expense savings, tbd) as a result of these immediate challenges. We are focusing on a revised acquisitions plan for ALA Editions/ ALA Neal-Schuman to publish fewer books but ensure that more of them are considered essential, and that each covers more ground to reach wider audiences. Tight collaboration across ALA and related opportunities such as the upcoming decolonizing libraries project are proving not just beneficial but critical. Seeking a new vendor for product fulfillment, warehousing, and distribution allows 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). Like all publishers, we would like to offer more viable and affordable alternatives to purchasing through distributors, while maintaining net revenue, so we can better capture customer information and develop more direct relationships, while also controlling costs.

New products, licensing opportunities, and a collaboration with REM are pointing to opportunities for ALA Graphics. Licensing revenue and royalties from the virtual store show the potential impact of these models for future development of products that promote libraries, literacy, and reading, with lower financial investment up front. The long-time reliance on poster sales as the main driver of ALA Graphics revenue has been significantly challenged in recent years, both related to building design and tight budgets with posters are seen as non-essential. High fulfillment costs for these products create very narrow margins, hence the investigation of licensing and on-demand models.

Library Journal and more recently *Publishers Weekly* have carved out space in the sponsored webinar environment addressing library best practices, trends, and challenges. These events attract significant registrations, appear to be well resourced, and are on a platform that sponsors tell us they find user-friendly. Centralizing CE across ALA and developing

a stronger platform for virtual events will help us better strategize and message competing events as ALA builds a more compelling overall program.

As publishers and other vendors seek alternative channels to reach the ALA audience without face-to-face conferences, *Booklist* and *American Libraries* in particular are focusing on how to provide those channels, 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. The cancellation of BookExpo led to several organizations quickly filling the gap for 2021, but if ALA can move fast, there may be a long-term opportunity that would be positive for *Booklist* among Publishing units.

Digital Reference/RDA is working on closing loops and tightening licensing requirements to stop RDA users in some countries from creating workaround products that allow them to apply aspects of the standard without subscribing to RDA Toolkit.

Member and Stakeholder Reach

As ALA becomes more focused on measuring engagement, especially among members/ non-members, we look forward to working with membership and IT on possible ways to capture relevant data and will investigate ways to better tailor related reporting. (Measures we may add—email open/clicks, website sessions.)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

7,816 print subscribers
59 institutional digital subscriptions
332,474 Booklist newsletter subscriptions (overlap—top single newsletter is around 100,000)
4,884 active profiles, Booklist Online
41,600 Twitter followers; Facebook 16,139; page followers, 14,530; YouTube channel subscribers 291
8,558 listens for 12 podcasts,
32,397 registrants for 21 webinars,

AL and AL Direct

50,816 recipients AL print (Sept/Oct and Nov/Dec)
35,888 average recipients weekly AL Direct
13,467 podcast listens
89,265 Twitter followers; 17,024 Facebook page followers

Digital Reference/RDA

2,238 Toolkit subscribers
9,586 users
21,388 newsletter subscribers
3,661 RDA-L email subscribers

eLearning Solutions

1,182 registrants, 30 events

ALA Graphics

968 orders
5,806 products purchased

ALA Editions/ ALA Neal Schuman

1,773 orders

13,043 units purchased (after returns)

50,241 print catalogs mailed

Key Activities:

Booklist:

- Convened the new Booklist advisory board <https://www.booklistonline.com/staff#advisory> and initiated three 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.
- The staff and the new Board together drafted and approved a Booklist mission statement.
- Increased or added collaborations with AASL, CMO (ilovelibraries.org), and the Graphic Novels and Comics Round Table (GNCRT).
- Made the Booklist 2020 Starred Review issue free and open to all as a service to library workers and all readers.

ALA Editions/ Neal-Schuman and ALA Graphics:

- Secured a consolidated military order for ALA Editions/ Neal-Schuman (\$104,013) and ALA Graphics (\$11,376)
- Published a total of 13 book projects in Q1. Important collaborative book projects with ALA units included [Ask, Listen, Empower: Grounding Your Library Work in Community Engagement](#), with PPO; [Pivoting during the Pandemic: Ideas for Serving Your Community Anytime, Anywhere](#), with PLA; [Intellectual Freedom Manual, Tenth Edition](#), with OIF; and several titles with the former ALCTS (now Core).
- ALA Graphics 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.
- ALA Graphics collaborated on a REM Read Poster Puzzle, with REM carrying all expenses and splitting proceeds of the sales between ALA and Books for Keeps in Athens, GA. Collaborated on promotion with CMO, ilovelibraries.org

American Libraries:

- Began the process for implementing a new column featuring rotating columnists of color.
- Renamed its popular podcast from *Dewey Decibel* to *Call Number with American Libraries* to distance itself from the problematic legacy of Melvil Dewey.
- Updated its 2021 media kit, which the advertising rep used to sell ad packages for the calendar year. (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 brings 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.
- Sales initiatives included the introduction of multiyear subscriptions for LIS, discounts tied to new ALA and CILIP memberships, and publication of print RDA Glossary. Marketing and outreach activities included new RDA-L platform to support community, and promotion and support of elearning RDA Lab Series.

eLearning Solutions

- Entered into a contract with the California Library Association to provide bulk rates for purchases of several ALA eLearning events. This partnership will generate over \$40,000 in revenue for ALA in Fiscal Year 2021.
- In partnership with Digital Reference, launched the second iteration of the RDA Labs series. This iteration, focused on the international market, will offer two times, one suited to customers in Europe, the other to customers in Asia and Oceania.

Entered into a partnership with Core to assist in the promotion of their eLearning events to help to boost Core’s sales, raise the profile of this new division, and result in additional revenue for eLearning Solutions.

Select Future Activities and Events Through End of Quarter (Q2):

Planning is underway 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. This will allow ALA to better capitalize on the breadth of content, expertise, and opportunities from the whole association. Q2 tasks include working with external consultants on an RFP for a consolidated platform to centralize discovery and registration. eLearning Solutions continues its ongoing revenue-generating activities, including production of the RDA Lab Series and launching a campaign with MRS to offer bulk sales to organizational members at special rates as a member benefit.

ALA Graphics has licensed new merchandise to Out of Print, due to launch in Q2. Marketing efforts will be coordinated with ALA Graphics and CMO, leveraging the reach of ilovelibraries.org.

Both *Booklist* and *American Libraries* will continue their work on custom content projects with sponsors, while seeking enhanced and additional opportunities.

Research will start on *Booklist* new patron-facing product(s) thanks to the Mellon grant. ALA Editions/ALA Neal-Schuman continues discussions with Core about what their integrated publishing program will look like, responding to specific proposals as they are shared.

Digital Reference expects to implement a new licensing and permission policy that will better protect copyright while generating additional revenue and is developing a proposal for a new optional customer service for RDA Toolkit subscribers.

Units across the department continue to engage with Membership Development on leveraging each other’s work and channels to better benefit ALA and will include investigating a “Membership Plus” concept. Extensive staff time and attention must continue to be dedicated in Q2, 3, 4 to ensure a smooth transition to new vendor(s) for product fulfillment, warehousing, and distribution.

REPORTS OF ALA DIVISIONS

AMERICAN ASSOCIATION OF SCHOOL LIBRARIANS

Division Executive Director: Sylvia Knight Norton

Budget Amount: Revenue \$422,090/ Expenses \$704,277/ Net -\$282,667

Staff: 5

Division Membership: 6,886 (as of April 2020)

AASL has continued work aligned with our mission yet adjusted tactics as the pandemic has impacted K-12 education, school librarians, and our communities.

Digital Literacy

AASL joined a number of other associations to form the National Association for Media Literacy Education (NAMLE) announced in June 2020 with a goal “in order to understand promising practices and fine-tune scaling efforts by working together across disciplines”. Through NAMLE, AASL joins association executives from the International Society for Technology in Education, National Council for Social Studies, National Writing Project, Public Broadcasting Service and others to support the need for media literacy and better track and analyze the practice across the country. The group

was unable to meet as scheduled and efforts have been impacted by the pandemic. The purpose and resolve are maintained with world events reinforcing the need for an informed and literate citizenry with the critical thinking skills necessary to navigate the media.

Virtual Conferences

Meetings with the executive directors in the NAMLE group also enabled an exchange of how other organizations were adjusting operations amidst a pandemic, most notably a shift to virtual conferences. AASL is following these conversations and details while planning for an in-person October 2021 national conference in Salt Lake City. Whatever the future scenario, AASL is committed to providing strong professional development at that time. The NAMLE discussions ranged from choosing software to revenue, attendance, the reduced registration rate, and examples of effective member engagement. The National Council of Teachers of English members have similar interests to AASL members for reading, books, and intellectual freedom. In fact, NCTE holds an annual fall conference which means AASL often competes for exhibitors in the fall of the every-other-year AASL National Conference. NCTE reported half of the usual attendance at a highly reduced registration for the value but used every aspect of the conference software for an effective networking lobby and member connections that led to a new interest group. NAMLE members did note the zoom fatigue of many educators and the difficulty of attending virtual events during a school day. However ISTE, a very visible technology education association with numerous school librarians as members, held a successful virtual conference in the fall to replace their usual June conference which should be noted as a conflict AASL members have each year for its timing during ALA Annual. Each year a number of AASL members, even member leaders, choose ISTE where the access to technology vendors is renown. AASL members have turned down presenting or being on a board that will meet during AASL Annual because they will be at ISTE. ISTE had a successful virtual conference and think that their experience last fall has led to plans to have a hybrid conference next June.

Job Market for the Profession

AASL continues to watch the job market for education. The predictions last spring for fewer school librarian jobs were not realized to the extent that was expected as schools reopened this fall. A number of school librarians were required to switch to classroom teaching positions, but overall, the ‘chatter’ about the loss of jobs has died down. AASL was proactive in sending a letter to the NEA last summer to remind them about their school librarian members in this COVID environment after the NEA guidelines described closing the school library or using it for social distancing space. The school librarian has roles as teacher, instructional partner, leader, informational specialist, and program administrator that can be used outside of the school library facility. AASL developed a resource for those roles in physical, virtual and hybrid learning environments. NEA quickly revised their guidelines with reminders of the school librarian role. Overall, the number of school librarian positions have had some impact this year with some cuts, but the administrators in the AASL School Leader Collaborative also report the leadership of their school librarian has been integral and key to the success of remote learning. That value will need to be evident as municipalities look this spring at local budgets and priorities for the next school year.

Member and Stakeholder Reach

During the first quarter of FY 2021, AASL has engaged members, non-members, and stakeholder as we planned events and communications:

- AASL ramped up promotion of the AASL National Conference to be held October 2021 in Salt Lake City and opened registration in December. Members are already posting to social media their enthusiasm for the conference’s professional development and networking. Membership numbers for AASL tend to seesaw with the timing for this every-other-year AASL National Conference. The April 2020 personal membership numbers are similar to the same time period in April 2018 after the National Conference held in the fall.
- Established the *AASL Friday Forecast*, a weekly email to members listing the various meetings, professional development opportunities and AASL events for the next month. Hyperlinks provide additional details for events or continuing education. Members have responded with enthusiasm for the easy-to-find in one place message that links back to press releases and other vehicles of communication about coming events for the next

few weeks. Committee members have liked the reminder of upcoming meetings and others have noted the evidence of volunteer effort and meetings that are needed for the association to meet its mission.

- Working closely with AASL Chapters (48 AASL-affiliated school library state-level associations of which only 9 are within ALA Chapters), AASL formally commended seventeen outstanding programs, events, and products as put forward by the AASL Chapters for their support of the school librarian profession and the learners the profession serves.

Key Activities:

AASL has continued in this first quarter to engage members after bringing the community together in March when COVID hit last spring and schools closed their doors and moved to remote learning. AASL launched the beginning of what would be 10 weekly events, the *AASL Town Hall: The Show Must Go On(line)* for an open conversation. Attendance at the events ranged from 75 to 500 participants with active engagement in the chat or in audio/video opportunities for individuals to be recognized and share their story or ask a question of the group. First established to build community during the uncertainty of the COVID-19 pandemic, the AASL Town Halls in the first quarter of FY 2021 became monthly events for school library professionals to network and brainstorm around a central theme. Facilitated by AASL leadership, school librarians at the AASL Town Halls: Leading Learning share successes, solicit ideas, and strategize the best ways to meet the needs of learners. The shows are archived and available on the AASL website.

Once established as forums with central themes, the Town Halls have looked at the re-opening of schools, how we continue the usual planning efforts amidst uncertainty, and leadership roles. The leadership aspect was the most talked about by members with numerous posts to social media. It was held as the November Town Hall and featured six of the seven members of the AASL School Leader Collaborative, an AASL initiative sponsored by OverDrive Education to connect with school administrators. The Collaborative began in the summer of 2020 with superintendents and principals nominated by their school librarians for their support and selected for a diverse group of positions and geography. These administrators have worked closely with AASL to provide feedback on messaging and materials that resonate with their peers. They also presented a workshop for 50 administrators during the last AASL National Conference. As well informed and supportive leaders, they answered questions and listened to the almost 400 school librarians who attended the Town Hall.

The response by members and recognition of the critical importance of our working with these decisionmakers has been notable and provide an impetus towards future efforts. The planning for the AASL National Conference includes programming which may appeal to the school administrators who also attend. AASL provides complimentary registration to those administrators attending with their school librarian, a benefit the administrator for the principal of the AASL President that was deemed as professional development worthy of asking other administrators to attend the AASL National Conference to be held next fall.

Select Future Activities and Events Through End of Quarter:

- Future activities and events for the second quarter of FY 2021 have a strong focus on the continued planning for the AASL National Conference. The concurrent proposal submission deadline is February. The AASL 2021 National Conference Committee meets regularly and will finalize keynote speakers and continue the efforts to engage with members and the profession during this event.
- The submissions for AASL Awards end in February with 20 committees scheduled to review applications and select winners. A recent gift from a member donor will also continue special awards to support collections, replace resources, and help school libraries offset the impact of COVID.
- The AASL Standards Portal will be launched after an extensive revision to reflect the findings from last year's report from a research firm evaluating the National School Library Standards. The findings were used to revamp the site for the websites' approach for providing gateways introducing, applying, and transforming learning through the *National School Library Standards for Learners, School Librarians, and School Libraries* (2018).

ASSOCIATION OF COLLEGE AND RESEARCH LIBRARIES

Executive Director: Kara Malenfant

FY 2021 Budget Amount: Revenues \$3,929,775/Expenses \$4,470,639/Net -\$540,864

Staff: 13

Division Membership: 9,006 approximately

Impact of the Pandemic on Academic Libraries

According to the American Council on Education, the money provided in the recent second stimulus bill passed by Congress "... will provide some limited relief, which is welcome news to struggling students and institutions. But it is not going to be nearly enough in the long run or even the medium term. The financial impact of the pandemic and its economic fallout will be enormous, with more than a half a million job losses on campuses already."

The Council also states that "The situation currently facing America's colleges and universities is a crisis of almost unimaginable magnitude. Colleges and universities have already pushed their financial capacities to the limits in addressing this crisis. As detailed above, campuses are now dealing with a massive, accumulated loss of revenue that is likely to grow worse in the near future, and in most areas will persist for several years. This is taking place at a time when nearly all operational costs have significantly increased, to a degree beyond what could have been reasonably expected. The result of this has been devastating and widespread: programs have been closed; schools have drained what reserves they had and most troublingly for institutions, according to the Bureau of Labor Statistics more than 484,000 higher education employees have been laid off since February, more than 12% of the overall workforce."

This impact of the pandemic touches academic libraries as well, with the possibility of reduced funding for programs, services, and positions likely over the next several years. This may mean less money available at libraries to spend on professional development opportunities such as conferences and webcasts, along with the potential for reduced collection development funding to purchase professional materials such as books. A continued reduction in academic library hiring may negatively impact revenue from ALA JobLIST as fewer jobs are posted along with potentially negatively impacting membership as individual librarians feel the financial impact on a personal level.

While these trends are ominous, they also present an opportunity for innovation. ACRL staff are meeting regularly to brainstorm potential new revenue ideas to help address the shifting landscape and maintain the financial stability of the division while continuing to meet our mission as the higher education association for librarians. Staff have redesigned the membership and donation pages on the ACRL website to increase appeal. Additional donation touchpoints have been added across the division website to capture mission-centric donations at the point of use, such as on the ACRL Standards, Guidelines, and Frameworks page. Staff will continue to monitor the environment and adapt/develop new revenue ideas.

Member and Stakeholder Reach

- Paid E-Learning attendance: 183 individuals and 70 groups
 - ACRL Presents free webinar registrants: 584 individuals
 - Newsletter total opens: 55,311
 - Print books sold: 743
 - Journal website total views (C&RL, C&RL News, RBM): 768,233
 - C&RL News total print circulation (3 issues): 26,170
 - ACRL website total visits: 209,152
- While we are waiting for more detailed membership data, an informal update from the ALA Member Relations and Services Office for December 2020 showed ACRL membership experienced a 1.5% decline from November 2020. 644 members either joined, renewed, or reinstated their membership in December 2020.

- In November, the ACRL Board of Directors approved up to \$10,800 to fund 50 ALA and ACRL memberships for BIPOC library workers serving underrepresented groups in FY 2021.
- ACRL's e-Learning program offered five live webcasts during this report period. 183 individuals and 70 groups participated in e-learning focusing copyright and course reserves, interim leadership, and the research process. Upcoming topics for the ACRL e-Learning program include makerspaces and technology services, scholarly communication, digital scholarship partnerships, and open educational resources. ACRL also offered three free "ACRL Presents" webinars during this report period. Nearly 600 individuals registered for the webinars focusing on reopening campus, equity, and inclusion in scholarly communication, and fostering change.
- Five new ACRL books were published during the quarter and were promoted for purchase to members and other stakeholders. ACRL print books sold 743 copies in the first quarter.

Key Activities:

ACRL 2021 Conference:

ACRL 2021 Conference Going Virtual Due to COVID-19: <https://acrl.ala.org/acrlinsider/archives/20314>

- The move of the ACRL 2021 Conference to an all-virtual event was announced in October 2020. Staff worked to identify a platform for the virtual conference over the course of the fall. The scholarship application deadline was extended due to the change in format, with application due at the end of October. Notifications for contributed paper and panel proposals were sent in December 2020. Registration for ACRL 2021 virtual is expected to open in January 2021 with the conference taking place April 13-16, 2021, offering a mix of semi-live and on-demand programs. Keynote speakers Tressie McMillan Cottom and Mona Chalabi have agreed to present virtually.

General

- 2021 ACRL Board of Directors Candidates: <https://acrl.ala.org/acrlinsider/archives/20385>
- ACRL Statement on Equity, Diversity, Inclusion, and the Print Collecting Imperative: <https://acrl.ala.org/acrlinsider/archives/20355>
- ACRL Joins Ahmad v. University of Michigan Amicus Brief Filing: <https://acrl.ala.org/acrlinsider/archives/20329>

New Publications:

- Student Wellness and Academic Libraries: <https://acrl.ala.org/acrlinsider/archives/20530>
- 2019 Academic Library Trends and Statistics: <https://acrl.ala.org/acrlinsider/archives/20478>
- The Library Outreach Cookbook: <https://acrl.ala.org/acrlinsider/archives/20434>
- Fostering Change: A Team-Based Guide: <https://acrl.ala.org/acrlinsider/archives/20428>
- Reflections on Practitioner Research: A Practical Guide for Information Professionals: <https://acrl.ala.org/acrlinsider/archives/20205>
- ACRL e-Learning Webcast Series: Research Process, Methods, and Relationships for Academic Librarians: <https://acrl.ala.org/acrlinsider/archives/20446>

Select Future Activities and Events Through End of Quarter:

- Nominations Sought for ACRL Board of Directors: <https://acrl.ala.org/acrlinsider/archives/20656>
- Volunteer for ACRL Division, Section, or Representative Appointments: <https://acrl.ala.org/acrlinsider/archives/20664>
- Applications, Nominations Invited for C&RL Editor: <https://acrl.ala.org/acrlinsider/archives/20637>

ASSOCIATION FOR LIBRARY SERVICE TO CHILDREN

Division Executive Director: Aimee Strittmatter

Budget Amount: \$1,500,000

of Staff: 8

Division Membership: 3,852 (estimate as of November 2020)

Reimagining Serving Youth and their Families

The impact of COVID-19 has played a significant role in motivating major shifts in activities, practices and conversations among library professionals and other groups serving children and their caregivers. Several areas of interest have been points of discussion on the ALSC blog and social media, ALA Connect, ALSC Discussion Lists, webinars and national media, as people try to make sense of the immediate need to pivot work flow processes we have come to take for granted. Ultimately, this creates a greater need to reimagine public libraries and their spaces and programming serving youth and their families. Below are some discussions topics that ALSC has engaged in and has been addressing or plans to address with our membership.

Virtual Programming Training – In response to the shelter-in-place order in March 2020, most libraries closed their buildings to their communities and have not resumed normal, in-person services. As a result, libraries have worked to quickly shift their programming to virtual spaces, so their young patrons continue to have access to high-quality programming such as storytimes that support early literacy, as well as summer learning programs and STEAM activities that supplement out-of-school-time learning for school-age children. These programming shifts required library professionals to acquire new equipment and learn new skills to provide live and recorded virtual programming.

ALSC, recognized how virtual programs help youth services library professionals connect with their communities during a crisis and in collaboration with Colorado Libraries for Early Literacy (CLEL) developed the [Virtual Storytime Service Guide](#) as a resource for those seeking to offer or improve storytime services from afar. The guide includes resources and suggestions for virtual storytimes, and other online library experiences and it identifies technology tools, copyright information, and considerations for serving diverse children and families. These areas continue to be opportunities for learning across library systems. ALSC is considering ways to expand the resources and training opportunities to support library professionals as they address these ongoing programming needs.

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 are in need of 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 will be developing a presentation for the next ALSC Community Forum that will address how to support and advocate for furloughed and laid off library workers. Content will utilize the [ALSC Championing Children’s Services Toolkit](#) and advocacy resources from the ALA Public Policy and Advocacy Office.

Continuing Education and Virtual Spaces – Since March 2020, in-person events and conferences largely have shifted to virtual spaces. These shifts brought challenges in developing virtual learning spaces that offered the benefits of in-person events such as networking with other colleagues and visiting local libraries in the host city. However, based ALSC 2020 Virtual Institute survey results the affordability of virtual education enabled out-of-work, furloughed, and professionals with no employer-sponsored continuing education monies to participate in Institute programming. Additionally, 25-30% of attendees received no funding from their employer to attend Institute. When asked what they liked best about Institute, overwhelming key takeaways were: virtual nature, affordability, on-demand access to content, and the content (specifically diversity-based programming). These benefits will need to be considered in future continuing education opportunities.

The Impact of COVID-19 on Education and Student Success – Even as libraries have worked 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 children in schools (in-person, virtually, or hybrid) these efforts are not enough to reduce the growing gaps in education for children whose educational experiences are varied, inconsistent and often inaccessible. Students of color are most often those who also are experiencing economic hardships that impede the ability to be set up to succeed. Libraries are working to continue their efforts to support education but are limited in their resources, staffing and funding.

Youth and Family Trauma – Our nation is in the midst of a global pandemic that has resulted in our 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 will be seeking feedback on from members to develop continuing education opportunities that will help library staff provide trauma-informed exchanges and resources to their library communities.

Member and Stakeholder Reach:

In Q1:

- 3,852 Members
- 354.1k – Impressions on Twitter made
- 80,591 – Reach of our Facebook posts
- 40,625 – Recipients of emails
- 868 – Institute attendees

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

Compared to November 2019, ALSC is experiencing a 2.18% decline in overall membership. This is likely due to the impact of COVID-19 on members and operations. Although there has been a decline in overall membership, there has been high engagement across ALSC's online platforms and events. Additionally, ALSC's advocacy, equity, diversity, and inclusion efforts have been well received by members and the community at-large.

- Over 354.1k total Twitter impressions earned in FY 2021 Q1, a 130.5% increase compared to FY 2020 Q1. This sharp increase due to the announcing of the Relief Renewals for BIPOC ALSC Members opportunity; ALSC and BCALA's partnership with Netflix on the Bookmarks: Celebrating Black Voices series; and the segment on Good Morning America, highlighting ALSC's #LooktoLibraries public awareness campaign.
- 2020 Virtual Institute brought 868 attendees, approximately half of which were non-ALSC members.
- Individuals who attended the ALSC Virtual Institute who identified as non-members, received a follow-up message detailing the value of joining and engaging with ALSC and ask to join.
- Engaged 420 members and non-members in four ALSC hosted webinars in Q1 on topics related to building literacy in the library and managing youth services.
- Engaged 153 members and non-members online in public Notable Children's Books discussions, which are usually held in-person at Annual conference.
- Approximately 64 ALSC members applied for one of ALSC's 4 professional awards offered in Q1.

Key Activities:

#LookToLibraries - ALSC launched #LookToLibraries in August 2020, offering free access to media mentoring tools and resources to support library professionals in all types of libraries and caregivers as they assist children with understanding and healing from challenging situations. Resources include booklists and a compilation of web resources from expert sources, such as the Centers for Disease Control and Prevention, to provide guidance on talking with children about sensitive topics, COVID-19, and managing stress, and keeping children healthy while school is out.

ALSC and ALA's CMO are promoting the value of children's library professionals as youth media mentors through #LookToLibraries across ALA and through national media channels and sharing these resources to support advocacy efforts.

In September 2020, ALSC President, Kirby McCurtis appeared as a guest on "Pandemic: What You Need to Know," a new ABC Network program as part of Good Morning America. This national news segment focused on #LooktoLibraries. In December 2020 an article from Kirby McCurtis was published as part of a *USA Today* magazine insert on the "Future of Education". ALSC leadership also participated in a series of #LooktoLibraries interviews with print and radio outlets including Publishers Weekly and FOX Radio Network.

Media Mentorship - ALSC is currently serving in an advisory role on a project with New America and backed by a McCormick Foundation in Chicago grant to reach librarians nationwide through a book study featuring the ALSC-published *Becoming a Media Mentor*. New America hosted a national forum in December 2020 featuring several ALSC members as presenters and panelists.

Netflix Partnership – ALSC partnered with Netflix on the 12-episode series, Bookmarks: Celebrating Black Voices project to encourage families and caregivers to read books by Black authors and illustrators with children and give ALSC the opportunity to share supplemental resources like its Supporting Diverse Communities Toolkit, Booklists Created by ALSC Library Professionals, and #LooktoLibraries. The collaboration aligned with ALSC's commitment to working toward social justice and racial equity.

The Black Caucus of ALA also partnered with Netflix on the project by providing an age-leveled book list and family activities. The series is available on the Netflix platform and for free without subscription on the Netflix Jr. YouTube channel. All videos and supplemental resources are accessible on the Bookmarks Microsite at [Netflixbookmarks.com](https://netflixbookmarks.com). There series premiere was followed by a Bookmarks panel discussion on race, identity, and social justice in children's literature. Promotion for the panel received over 18,000 combined impressions across ALSC's social media channels. The panel received roughly 500 engagements on Facebook. The resource page on the Bookmarks website is the second most visited page next to the series landing page and users are returning to the site to engage.

2020 Virtual Institute - On October 2-3 ALSC held the 2020 Virtual Institute - Dive In: Engage, Amplify, Activate providing attendees an opportunity to develop themselves as library professionals serving children and families. Due to the Covid-19 pandemic, this Institute shifted to a virtual environment with low-cost registration, resulting in the highest Institute registration to-date, with 870 attendees, including more than 350 non-ALSC members. Programming included six general sessions, with speakers ranging from nationally celebrated authors and illustrators, to thought leaders and practitioners in child development, to librarians on the frontlines of working and serving communities in today's world. Two of the general sessions had more than 450 participants attend in real time, representing more than half of total registrants.

ALSC worked to create a revenue-positive, dynamic, professional development opportunity, as well as to promote the value of membership in ALSC . To ensure a revenue-positive event, \$8,000 in fiscal sponsorships were secured and the ALSC Board approved the use of William C. Morris Endowment funds to play a larger role in funding the Institute. Typically, the Endowment only covers costs associated with the Breakfast for Bill panel. In a follow up survey, attendees identified that they liked best, the virtual nature, affordability, on-demand access to content, and the content (specifically diversity-based programming).

This pilot virtual Institute allowed ALSC to gauge the impact, cost, receptiveness, and viability of future virtual-only programming, specifically as it relates to ongoing ALSC Continuing Education revisioning. Additionally, to demonstrate the value of an ALSC membership, non-ALSC member Institute attendees have received messaging with an invitation to join ALSC and to view a limited amount of member-only content. As Institute recordings and live winter webinars become available, these individuals will be contacted again to continue engaging them with ALSC's work.

ALSC 2020-2023 Strategic Plan – ALSC's board developed and approved the three-year strategic plan that began on September 1, 2020. The resulting strategic plan ensures its relativity to a post-pandemic environment and is ALSC's framework to direct how ALSC will invest its valuable and limited resources in meeting the future needs of its members while influencing the evolution of the profession. The plan includes three priority areas: **Equity, Diversity & Inclusion (EDI)** - ALSC will become more diverse and inclusive, acting to promote these values in all aspects of library service to children; **Advocacy** - ALSC will champion the value of library service to children and the resources necessary to deliver on our vision; **Learning & Development** - ALSC will actively develop new generations of leaders.

Specific activities to support the plans goals were developed, including a request that all ALSC committees develop an EDI goal related to their committee work to embed EDI in all the work produced within the division. Activities of the strategic plan are off to a strong start providing guidance for the work of the division. Progress is identified in quarterly [Strategic Plan Implementation Progress reports](#).

Select Future Activities and Events Through End of Quarter:

- Diversifying Revenue Streams Task Force – The task force has evaluated viable new, and changes to existing, revenue streams for ALSC with an objective of recommending avenues to pursue that create, strengthen, and diversify the organization's finances, consistent with the organization's mission and vision. Recommendations will focus on high value, high interest, proprietary content, and create an entrepreneurial culture among members and committees. Final recommendations will be reviewed by the ALSC board at their Midwinter Board meeting.
- 100th Anniversary of the Newbery Award- The Newbery 100th offers ALSC members and supporters an opportunity to celebrate, reflect and build on 100 years of excellent award-winning books. A task force is developing an action plan for the anniversary to be celebrated July 2021 – June 2022 and is considering opportunities that create revenue to offset development expenses and help contribute to ALSC's operating budget.
- 25th Anniversary of the Pura Belpré Award - The Pura Belpré Award is presented annually to a Latino/Latina writer and illustrator whose work best portrays, affirms, and celebrates the Latino cultural experience in an outstanding work of literature for children and youth. Development of the 25th anniversary celebración is underway as a joint effort between members of ALSC, REFORMA, and YALSA.
- 25th Anniversary of [El día de los niños/El día de los libros - Children's Day/Book Day \(Día\)](#) – Día emphasizes the importance of literacy for children of all linguistic and cultural backgrounds. FY 2021 marks the 25th anniversary of Día. ALSC will coordinate messaging and graphics with Día champions and similarly focused organizations. Booklists for children ages birth through 14 will be available for free download on the [dia.ala.org](#) website. ALSC continues to integrate the values of Día by building upon the growth of the Día National Program Registry and encouraging the use and sharing of resource materials to increase awareness of the initiative.

CORE

Division Executive Director: Kerry Ward

Budget Amount: \$1,000,000

Staff: 7

Division Membership: 6189 (estimate as of December 2020)

Core Begins the Strategic Planning Process

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 FY 2022, 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.

Member and Stakeholder Reach:

Through Core CE, approximately 1,550: 660 individuals, 100 groups (representing many hundreds more participants), 790 students.

Additional notes:

- **Membership:** lower than anticipated Core membership dues in FY 2021. ALA personal membership has declined. The extent is not certain yet, but 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.

Key Activities:

- As noted, Core is in its transitional year so activities, except for CE, are focused on operational ramp up of a new organization:
- Election of a 2020-21 President and President-elect
- Appointment of Nominating Committee and recruitment of candidates for 2021-22 President-elect
- Initial Board meetings
- Creation of division level committees/charges and recruiting new volunteers
- Creation of section and recruitment for section level leadership teams
- Creation of section level committees/charges and recruiting new volunteers
- Creation of new Interest Groups and chairs
- Creation of new membership messages and platforms:
 - [CoreNews](#) blog
 - [Twitter](#)
 - [Instagram](#)
 - [CoreTV](#)
- Development/coaching of staff in new roles
- Development of leadership orientation materials
- Moving Core publishing to ALA, except for those already in the pipeline elsewhere
- Creation of [a unified Core catalog of monographs](#) from past ALCTS and LITA publications
- Creation of [a unified, embeddable calendar of events](#) and [a CE calendar](#)
- Migration of the LITA Jobs Site to [the Core Jobs Site](#)
- Implementation of SQL and Informz groups for joins, renewals, drops, and reinstates plus marketing messages for each one
- Creation of a new CE format, “Core Classrooms”
- Migrated monthly ALCTS e-Forum format to Core and expanded topics to all of Core’s areas of focus

Select Future Activities and Events Through End of Quarter:

- The first Core Preservation Week
- Continued development of the CE program, both webinars and courses
- Planning for a fall Forum, originally an in-person conference but now TBD
- Recruitment for all committees
- Continued development of member communication, including town halls
- Development of EDI initiatives and communication
- Continued orientation for new/continuing members of Core
- [Appointments for 2021-22](#)
- Development of strategic actions to guide the remainder of FY 2021 and the planning for FY 2022
- Development of the full publishing program
- Production alignment for the three journals (all will remain independent)
- [Further automating rote and administrative tasks](#)
- [Creating data dashboards for the Core Board and members](#)

PUBLIC LIBRARY ASSOCIATION

Division Executive Director: Mary Hirsh (Interim)

Budget Amount: \$4,440,564

Staff: 13

Division Membership: 8995

Heeding the Call for Change

2020 saw COVID-19 and renewed calls for racial justice in communities across the US. Public libraries, serving at the intersection of vibrant communities and a strong democracy, responded quickly. In turn, PLA repositioned its services. The effects of both events are ongoing will reverberate through 2021 and beyond, surfacing four, interconnected trends to respond to.

1. [Budget constraints and the need for increased advocacy efforts.](#)

Public library budgets will be negatively impacted as municipal budgets absorb pandemic-related losses. The incoming Biden Administration [may extend federal relief](#) to state and local governments, which could mitigate some of this pressure. Libraries will look to ALA and similar organizations to advocate on their behalf and provide tools for local use. PLA and PPA have a successful partnership and will continue to work together to support national-level advocacy. Providing real-time advocacy resources for library use is an area of opportunity for PLA. PLA has many useful existing resources, such as [Project Outcome](#), [Turning the Page](#), and COVID-related templates that can be revised and remixed to meet the current need.

2. [The building is closed, the library is open.](#)

COVID restrictions vary from place to place, which means there is no one size fits all approach to delivering library services. While many library buildings are closed, they continue to offer services such as curbside pick-up and digital programming. This echoes broader societal trends related to [increased adoption of technology and growing reliance on ecommerce](#). Public libraries have been very creative in experimenting with digital tools. But this is not without challenges. Libraries that rely on door counts and circulation numbers as vital budget statistics will need to re-think how to measure impact and value. Staffing and determining who can work from home and who must be on site presents labor issues. Reaching patrons who do not have access to broadband or other digital tools highlights issues of equitable service. PLA will support public libraries shifting service models by leveraging its national platform to [share local innovations](#). As above, advocacy resources will be deployed that enable libraries to demonstrate current impacts. PLA will continue to support Digital Content Working Group activities that lead to better access to digital products and tools.

3. [Public libraries as centers of more inclusive, equitable and just communities.](#)

The Black Lives Matter movement and COVID-19 pandemic both called attention to inequities. While libraries are free and accessible spaces, they are not totally equitable. The move to online life has exposed serious gaps in who has the tools, skills, and resources to engage. Vulnerable populations who rely on the library as a safe space may be excluded from closed building. More abstractly, libraries are very white spaces, both in terms of staff make up and the policies and practices they implement. To their immense credit, libraries have been working to address these issues and the last year has accelerated and spread activities. PLA will continue to enable the work of its [Equity, Diversity, Inclusion and Social Justice Taskforce](#) by making space for [learning and difficult conversations](#). PLA will also work to continue the efforts of the [Inclusive Internship Initiative](#), which brings students from underrepresented backgrounds into library work for the summer.

4. [The imperative to partner](#)

Public libraries have long partnered with other organizations to deliver services and reach specific populations. The need to partner will deepen as resources become more constrained while individual needs expand. Libraries are in a unique spot to work with other groups on such pressing issues as health, workforce development, and supporting out-of-classroom learning. [PLA's Leadership Academy](#) content stresses the importance of working within community-based partnerships. This content will be delivered to a new audience in a new format during our

Leadership Lab series. PLA itself has expanded its partnerships to better serve libraries, including working with Microsoft to help bridge the digital divide and with [Community Catalyst](#), [the Robert Wood Johnson Foundation](#) and the [National Library of Medicine](#) to increase health outcomes in communities.

Peer organizations like [OCLC/Webjunction](#) at [ULC](#) face the same challenges. Like PLA, they are exploring more virtual offerings on emergent topics. The ability to again gather in person remains an unknown; IFLA has cancelled its 2021 Congress and is using this time [to reevaluate how it meets](#).

PLA is nationally known for providing the highest quality CE to public library workers, matching the pivot strategy goal of continuing education. We will continue to look to provide opportunities for our audience to connect, share and learn from each other. PLA also has a successful track record of generating grant and partner funds. As more organizations look to libraries as partners in recovery, PLA will work to maintain or expand our contribute revenue streams.

Member and Stakeholder Reach:

PLA membership trends on a two-year cycle, aligned with national conferences. Compared to December 2018, PLA membership is down 2% in December 2020, from 9176 to 8995. Given the current circumstance of the pandemic, PLA is not too concerned about this drop. We maintain a healthy membership base and financial position.

PLA added a new member benefit in in October 2020 called [Learning Tapas](#), tutorial videos and guidebooks that introduce “bite-sized” learning to topics such as “Effective Networking Skills” and “How to Find a Mentor or a Coach,” which are stored in the PLA Connect Member Library. The *Learning Tapas* have been viewed 201 and downloaded 72 times since launch.

Since September 1, PLA has offered 6 live webinars (3 free and 3 paid) that have reached a total of 3,076 registrants and PLA on-demand webinars have been viewed 6,656 times during the same period.

Key Activities:

Despite COVID-19, PLA has continued and expanded its **continuing education program**, reaching an increasing number of public library staff with high quality programs. In December 2020, PLA completed the first [Advancing Family Engagement in Libraries](#) professional development series, which engaged 60 staff from 30 diverse libraries in an 8-part exploration of PLA’s family engagement framework. PLA presented five webinars to 3,076 attendees: [Managing Student Loan Anxiety and Coping Financially During COVID-19](#) (October 2020), [The ACA and Advancing LGBTQ Health](#) (October 2020), [Providing Library Senior Services in a COVID-19 World](#) (November 2020), [150 Million New Technology-Oriented Jobs and the Skills Needed to Get Them](#) (November 2020), and [Representation in the Library of Congress Collections: Complicating the Narrative](#) (December 2020). PLA on-demand webinars have been viewed 6,656 times during the same period. Throughout 2020, PLA’s paid webinars generated higher revenue than budgeted.

In Q4 2020, PLA’s special initiatives on **health insurance enrollment** and **digital access/skilling** made significant progress. The third year of the initiative [Promoting Health Communities: Libraries Connecting You to Coverage](#), sponsored by the [Robert Wood Johnson Foundation](#) and [Community Catalyst](#) kicked off with the open enrollment period in November 2020. Twenty-one libraries were awarded funds to become [Certified Application Counselor Designated Organizations](#) (CDOs), and education and materials were provided to them and PLA members nationwide to promote ACA enrollment generally. The [PLA and Microsoft Public WiFi Access Micro Grant Program](#), to provide WiFi access points to rural libraries to extend their signals, confirmed 57 individual access point locations were up and running. Nearly 50 additional library branches are in process of setting up their signals. PLA and Microsoft also launched a new collaboration, [Skilling for Employment Post COVID-19](#). This initiative will help libraries identify existing and new tools for helping community members gain skills for jobs that are well positioned to grow in the future. Libraries nationwide are being provided with training and links to free and discounted resources on LinkedIn, GitHub, and Microsoft Learn, and four large urban libraries will receive special funding for skilling programs as well as 400 tablet computers to distribute to families impacted by COVID-19.

PLA's publications program released four new products: the 2021 [Early Literacy Calendar](#), the book [Pivoting during the Pandemic: Ideas for Serving Your Community Anytime, Anywhere](#), and the Learning Tapas series videos and guidebooks on [Effective Networking Skills](#) and [Finding a Mentor or a Coach](#). PLA continued to explore **partnership opportunities** with many groups including the AT&T ScreenReady program, REI and the Recreate Responsibly Coalition, Special Olympics, the Institute of Electrical and Electronics Engineers, WGBH Boston, Next Century Cities, the National Network of Libraries of Medicine, TechSoup, and the National Association of State Workforce Agencies.

The PLA **Board of Directors** continued to meet monthly, due to the need for additional time to discuss the PLA Executive Director search, a revised PLA strategic plan, and various ALA efforts including SCOE, Forward Together, the Operating Agreement revision, and the pivot strategy. A consultant to create the **new PLA strategic plan** was hired in December 2020. Candidates for the 2021 PLA election were confirmed in December 2020 and include (for President) [Richard Kong](#) of Skokie, Ill. and [Maria Taesil Hudson McCauley](#) of Cambridge, Mass., and (for Directors-at-Large) [Candice Wing-yee Mack](#) of Los Angeles, Calif., [Lois Langer Thompson](#) of Marysville, Wash., [Erica Freudenberger](#) of Saratoga Springs, N.Y. and [KennethWayne Thompson](#) of La Plata, Md.

Select Future Activities and Events Through End of Quarter:

PLA excited about a busy next quarter, which will feature [three programs during Midwinter](#), [monthly webinars](#), a new [Leadership Lab](#) series, and the kick off of the second [Family Engagement](#) learning series.

REFERENCE AND USER SERVICES ASSOCIATION

Division Executive Director: Bill Ladewski

Budget Amount: Revenue - \$334,783, Expense - \$378,717

Staff: 3.1 (Staff divides time between RUSA, ASGCLA & ODL0S)

Division Membership: 2682 as of March 2020

A Period of Rapid Adaptation

The work of reference and user services has been affected by the current pandemic and has required rapid adapting by our members to perform their roles and responsibilities in this current environment. RUSA this month will convene a member Town Hall featuring each of its six sections describing how sections, section members, and their organizations have responded to operating during the ongoing pandemic. Topics covered during the Town Hall will include, Resource Sharing During COVID 19, On the Front Lines: Reference Services during the Pandemic, Bridging the Digital Divide During the Pandemic, and Addressing Textbook Access Issues and Student Success by Pursuing Institutional Access to e-Textbooks.

RUSA is also currently engaged in updating the "definition of reference". RUSA is examining the current definition of reference, how it compares to the current practice of reference, and what would be needed for a reaffirmation or redefinition of reference. Question raised and addressed in this examination have included, the extent to which our current definition is relevant to your library, what role might the definition of reference play in how we talk about reference, and how might the definition contribute to RUSA's aim to "advance the evolution of the profession and better serve users in a continuously changing information society". The task force leading this work hosted a RUSA Town Hall in December and will also present as a discussion group during the upcoming ALA Midwinter program. The goal is to conclude this work by ALA Annual 2021.

In addition to adjusting for our current programming to support our members with the issues they now face due to the impact of the continuing pandemic, and also working to advance the profession through the definition of reference work, RUSA continues to look for new revenue streams to help cover current operating costs. RUSA membership, our main source of

revenue, has decreased slightly over the past year. However, with the dissolution of ASGCLA becoming official on September 1st, RUSA took in three former ASGCLA groups. These three groups comprised roughly 300 new members for RUSA. We anticipate these new members from the former ASGCLA will positively impact our membership numbers and revenue.

RUSA Continuing Education is our second largest revenue generator and we have been encouraged by the growth shown in this area. RUSA CE exceeded budget expectations last year by over 30%. So far through the first quarter of FY 2021 this output in CE appears sustainable. Through the increase in CE revenue and the influx of 300 new ASGCLA members, it is our hope that revenue levels in RUSA will be enough to offset expense in FY 2021.

Because RUSA is and has been operating in a very fragile financial state, the RUSA Board appointed a RUSA Futures Task Force last year to investigate and recommend a course of action to bring RUSA to a state of financial sustainability. The work of the Task Force has been ongoing. A recent action by the Task Force, which was approved by RUSA Board in November, was to cap the budgeted expense for the RUSA journal RUSQ at \$8500, which is approximately a 70% decrease from what it previously cost. The Task Force is currently looking at the RUSA awards and the costs associated with administering those to see where changes may be able to occur.

The RUSA Futures Task Force will also serve this year as RUSA's Budget and Finance committee. RUSA's plan is to begin implementing a pivot strategy in our budget planning to better align RUSA revenue with expenses. RUSA has operated at a deficit for roughly the last 10 years which is what has brought it now to the brink of insolvency. We anticipate this pivot strategy of RUSA's will work to best align with the aspects of the ALA pivot strategy. RUSA is hopeful it can work through a three-year pivot strategy. We have completed year one. We hope to continue to stabilize our financial standing in year two and by year three we are hopeful to have both established and new revenue streams generating revenue greater than our expenses.

Member and Stakeholder Reach:

- 41,000 individuals reached

We have seen continued strong performance of RUSA CE programs. Our December Town Hall on the Definition of Reference also had a strong showing with nearly 400 total registrants. We have been unable to determine our current membership numbers unfortunately but hope to be able to do that soon as ALA Membership and Finance work to bring reporting back on schedule.

- In the first quarter of FY 2021 RUSA CE has presented 4 e-course and 2 webinars totaling 213 participants. Additional confirmed upcoming CE programming consist of 5 e-course and 4 webinars. RUSA CE is currently on pace to match its output of FY 2020.
- RUSA will be holding three Discussion groups at the upcoming ALA Midwinter program, "***Tips and Techniques for Continuing Education Proposals***", "***STARS ILL Discussion Group***" and "***Definition of Reference Discussion Group***". In addition, RUSA will also hold its Book & Media Awards as a virtual program shortly after Midwinter. Our Book & Media Awards program has historically draw over 200 attendees and we are hopeful that will continue as we transition to a virtual program this year.
- The RUSA Achievement Awards submission sites are also now open. Submissions will be accepted through February 12th. RUSA currently presents a total of 25 Achievement Awards.

Key Activities:

As mentioned previously, RUSA has grown its member base this quarter with the onboarding of three former ASGCLA groups, the Federal and Armed Forces Libraries Interest Group (FAFLIG), Physical Delivery Interest Group, and the Accessibility Assembly. These three groups represented approximately 300 new members to RUSA. RUSA leadership prioritized the onboarding of these three groups so that any disruptions to their ongoing work and methods of operating were kept to a minimum. The onboarding has been smooth and satisfaction of these groups to their new RUSA home has been positive.

Since coming to RUSA, FAFLIG has updated its administrative structure and approved a new operating manual. FAFLIG members meet on a consistent basis and are a very active group within RUSA.

The Physical Delivery Interest Group was added to the RUSA section Sharing and Transforming Access to Resources Section (STARS). In addition to increasing RUSA membership, this inclusion into STARS also increased the section membership. In December, the Physical Delivery Interest Group held a popular open discussion where they were able to both introduce themselves and share examples of their current work with all of RUSA.

The Accessibility Assembly continues its commitment to diversity and to accessibility of library and information services for all, including people with physical, sensory, or mental disabilities, as reflected in the ALA policy on library services to people with disabilities. The Accessibility Assembly recently updated its webcast tutorial *“Positive Interactions: Making the Library a Welcoming and Empowering Place for People with Disabilities”*, the sales of which have helped increase RUSA’s overall revenue.

Although not yet confirmed as of this writing, there are plans to showcase the three new former ASGCLA groups at our upcoming RUSA Town Hall in February. The Town Hall will be an opportunity to formally welcome all three groups to the full RUSA membership and allow them the chance to both share the work they specialize in and encourage other RUSA members who might be interested to now join them.

Another impactful activity this quarter has been the ongoing work of the task force addressing the Definition of Reference. The current definition of reference approved by RUSA Board dates to January 2008. In December, the task force continued their work by leading a Town Hall discussion. These attendees of the Town Hall were made up of both RUSA and non-RUSA members. The goal of the task force has been to be as broad as possible in soliciting feedback and ideas around this work.

A timeline for the completion of the work is to hopefully get final Board approval of the new definition of reference at ALA Annual 2021. In the coming months, the task force will present again at the ALA Midwinter Conference, continue to solicit feedback from across ALA through surveying and more targeted discussions with individual groups and stakeholders, and present the completed work at ALA Annual 2021.

Finally, the continuing work of the RUSA Futures Task force has had direct impact on different areas of RUSA operations. Work has begun on reviewing alternative production options for the RUSA journal RUSQ to meet the adjusted spending cap of \$8500 which was approved at the November RUSA Board meeting. The Futures Task Force has been primarily focused on RUSA expenses since it began its work, looking to see where expenses could be reduced without eliminating or drastically reducing member services and resources. The Task Force will soon expand its review into RUSA revenue streams to look for growth opportunities in current revenue areas and where new revenue streams can be created.

Select Future Activities and Events Through End of Quarter:

RUSA will be hosting in early February our very popular event the Book and Media Awards. This year the award program will be virtual, and we anticipate strong attendance similar to what we have experienced in the past when the event was held at the ALA Midwinter program. At the Book and Media Awards we unveil the year’s best in fiction, nonfiction, poetry, audiobook narration, and reference materials.

Included with the Book and Media Awards will be the announcement of the Andrew Carnegie Medals for Excellence in Fiction and Nonfiction. Winners are hand-picked by our expert selection committees that work closely with adult readers. Their tireless efforts narrow down hundreds of finalists to curate the highly regarded “Best of” lists used by librarians, publishers, and booksellers nationwide.

In February RUSA will also close submissions for our Achievement Awards and the different achievement award committees will begin to convene to select this year’s winners. RUSA’s Achievement Awards honors the best in reference librarianship and its many specialties and recognize and honor the outstanding professional contributions and achievements of members. RUSA awards 25 different Achievement Awards. Winners are typically honored at the

president's program at ALA Annual and recently we have incorporated developing podcasts where the winners can share highlights of their winning work.

Finally, RUSA is excited to be hosting three discussion groups at the upcoming Midwinter program. The discussion groups will cover timely topics of interest for RUSA and we anticipate the programs will be very well attended and received.

UNITED FOR LIBRARIES

Division Executive Director: Beth Nawalinski

Budget Amount: \$346,093

Staff: 2.8

Division Membership: 4,050

The pandemic brought new challenges to library boards of Trustees, Friends groups, and Foundations. Pre-pandemic, United served members through a bi-monthly print newsletter, an in-depth digital repository of tip sheets, toolkits, publications, on-demand and live webinars, and conference programs. Our listservs have enabled those who govern, fundraise, and advocate for libraries to connect with peers around the country. As the pandemic grew, United moved swiftly to deliver much-needed training, resources, and peer connection focused on the specific needs of our members and constituency.

Boards of Trustees continue to face closure and reopening decisions; outdated or ill-equipped policies; understanding their role in the face of a pandemic in relation to the library director, local/state law, and local government; navigating and fulfilling responsibilities within limits of the board (governing/advisory); significant budget cuts; transition to virtual meetings, and more.

Historically the mainstay of fundraising for Friends groups, the traditional used book sale, bookstore, and pop-up used book sales quickly phased out, and most have not been reinstated. Many groups were not prepared for this shift, and the loss of the used book sale as a core event and fundraiser for Friends has left some groups struggling with their identity and new role. Encouragingly we are seeing an upward trend with Friends groups and Foundations reinventing themselves and shifting from in-person programs, author events, and fundraisers to engaging members, supporters, and donors virtually. Foundations have seen a moderate to significant increase in the number of donors and the total amount of donations, often from individuals who have not donated in recent years.

To retain – and grow – membership, United must be relevant to our members and constituents with peer engagement, resources, and training to equip Trustees, Friends, and Foundations to effectively advocate for the needs of their libraries and provide training and resources to enable Trustees to fulfill their role, and help Friends and Foundations reinvent themselves in this changing environment.

State libraries, consortia, and regional cooperatives have depended heavily on in-person training for library Trustees and Friends. Ten years ago, United partnered with just two states to provide online digital training to boards, and it was primarily viewed as supplementary to in-person training. Over the past decade we have expanded and built a rich repository of on-demand training, live webinars, and downloadable tools for boards. Participation in, and demand for, United's online training and resources has grown significantly because of the pandemic due to (1) lack of in-person opportunities; (2) board members who have never taken online training joining our webinars and seeking more opportunities; (3) board members seeking connection with their peers, and (4) state libraries needing to pivot to virtual training. Today we partner with 19 states providing statewide group membership or access to training, including renewing all statewide partnerships up for renewal, bringing on two new states, rejoining one state, and securing a

consecutive year partnership with another state that rotates annually between United's training and their own in-person institute – all in the midst of the pandemic and budget cuts to state libraries.

Our primary competitors for on-demand training include Niche Academy, PCI Webinars, and InfoPeople. To be more competitive, United moved our training access to the Teachable platform, developed a reporting dashboard via Airtable to meet the needs of state libraries, and automated registration. These improvements implemented in early 2020 positioned United to effectively handle the significant increase in demand for training resulting from the pandemic.

Competitors for membership include state Trustee and Friends organizations. These organizations have direct access to boards, are better known to library directors and boards, and are typically promoted by state libraries. United has overall good relationships with these organizations, but there is significant opportunity for partnership and promotion. In the second quarter of FY 2021, a task force of United staff and board members will convene representatives from statewide Friends organizations for roundtable discussions about their specific needs and partnership opportunities.

Opportunities for membership and revenue growth include:

- Growing a new revenue stream through an annual virtual conference building on the success of United's first virtual event in August 2020.
- Increasing member engagement by reinstating monthly member forums started in September 2019 and put-on hold in April 2020 as United changed focus to partner with Chapter Relations and State & Local Advocacy for a series of COVID related webinars.
- Marketing and promotion of the [Action Planner PLUS+](#) package for United's recent publications with ALA Editions, including sales to individual libraries/boards and negotiated discounts for statewide purchase.
- Developing a clear value proposition for membership targeted at libraries and boards in states that purchase statewide training to encourage individual Trustees and boards to join ALA and United for Libraries.
- Marketing to the 53% of Trustee members of ALA who are not currently division members of United for Libraries.
- Cultivating and developing partnerships with statewide Friends and statewide Trustee organizations.

Member and Stakeholder Reach

- 20,000+

United's virtual conference in August 2020, which included one free registration per individual/group member, provided an incentive for lagging individuals/groups to renew. We currently have 1042 personal/organizational members, 2477 statewide group members, and 597 self-joining group members for a total of 4050 members. Each group represents a board of Trustees, Friends Group, or Library Foundation comprised of 7-10 (or more) individuals.

The number of libraries reached through statewide partnerships includes 1733 (statewide group membership) and 1753 (statewide training). A total of 16414 individuals are currently registered for one or more of United's on-demand webinars or training through our Teachable platform. Of those, 8401 are from the 19 states currently partnering with United for training or membership, and 8013 are from remaining states or other countries. To increase registration and engagement, in the second quarter of FY 2021 a task force comprised of United staff and board members will develop a toolkit for state libraries to use in marketing and promoting United resources in their state.

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. United staff is working with ALA's membership director to identify libraries in these states with no current ALA membership

(personal, organization, and/or group) and to develop marketing communication to encourage those libraries to establish a membership relationship with ALA/United.

Key Activities:

United hosted its first [virtual conference](#) for Trustees, Friends, and Foundations in August 2020. On-demand access to the four keynotes and seven programs was released in September to members and to individuals in some states with training partnerships. The [keynote](#) with Simon Sinek is available on Facebook and continues to be viewed regularly. Another keynote featured ALA Executive Director Tracie Hall speaking with Beth Burns and Ted Davis of The Friends of the Saint Paul Public Library about how their organization is simultaneously attempting to change how city leadership thinks about library funding and reckon with their own need for a more inclusive, community-centered approach to advocacy. Access to that keynote, [Heal, Recover, Grow: Re-Framing Library Advocacy to Meet Our Community's Greatest Needs](#), is available free. Viewing of both keynotes is highly recommended.

United and Chapter Relations hosted [Responding When COVID Comes to Your Library: Learning from Real Stories](#) on September 28, 2020. The webinar was the fifth in a series of COVID-19 webinars sponsored by United, Chapter Relations, and State & Local Advocacy (PPA). PLA, AASL, and ACRL also partnered for one or more of the webinars in this series. In this webinar, three public libraries shared how they responded when confronted with a positive case situation. Advance registration totaled 1182 with 710 people attending live. All registrants received on-demand access and several hundred additional people registered after for on-demand access. Between April and September of 2020, United sponsored or co-sponsored a total of nine COVID related webinars with a combined total of more than 25,000 registrations for the live events and thousands more for on-demand access. Additionally, more than 8,000 people have direct access to all nine webinars through statewide membership/training with United.

United was a Platinum sponsor of the [2020 Association for Rural & Small Libraries Conference](#), which was held virtually with more than 2,300 attendees in late September. In addition to being a conference sponsor, United presented a [keynote author panel](#) (live attendance: 500+) [moderated by Booklist's Donna Seaman](#) and featuring three authors from United corporate sponsor publishers. A United-sponsored panel, "Community Support for Your Library During COVID-19," (attendance: 475) featured librarians from small/rural libraries discussing how to work with Friends groups and Foundations, and a presentation selected by the conference programming committee, "Proving Your Library's Value: Persuasive, Organized & Memorable Messaging Using The E's of Libraries[®]," (attendance: 1016) showcased the ALA Editions title of the same name. Another selected program, "All Ages Welcome: Recruiting and Retaining Younger Generations for Library Boards, Friends Groups, and Foundations" (attendance: 733), was presented by United's 2018 ALA Emerging Leaders team and featured the ALA Editions title of the same name. United had more than 1,000 engagements in its virtual conference booth.

Friends of the Library groups around the country marked the 15th annual [National Friends of Libraries Week](#) October 18-24. Even while facing the challenges of their library buildings being closed, or open for limited hours, Friends groups continued to advocate for their libraries by promoting their groups, hosting virtual events and fundraisers, and showing appreciation for library staff and boards. Of particular note, Friends of the Queens (New York) Public Library received a [thank-you letter for National Friends of Libraries Week from Rep. Alexandria Ocasio-Cortez](#), and [several more elected officials](#) showed their support of the library as well. Friends of Tennessee Libraries hosted a [video series](#) designed to encourage and educate Friends groups who were stalled by pandemic restrictions. New videos were posted each day of the commemorative week. Denver Public Library Friends Foundation hosted a [virtual edition of their "Booklovers Ball"](#) featuring guest speaker author Kwame Alexander (*The Crossover*), an online fundraiser, and words from elected officials. Additional events in celebration of National Friends of Libraries Week are posted on Facebook and Twitter under #NationalFriendsofLibrariesWeek and #NFOLW20.

United soft launched a new product in partnership with ALA Editions. A new Action Planner PLUS+ package is now available for two recently released "Action Planners" – [Proving Your Library's Value: Persuasive, Organized, and](#)

[Memorable Messaging](#) and [All Ages Welcome: Recruiting and Retaining Younger Generations for Library Boards, Friends Groups and Foundations](#). ALA Editions manages the distribution and sales of the print and ebook versions of both publications. United for Libraries manages an enhanced Action Planner PLUS+ package for library boards of Trustees, Friends Groups, and Foundations that includes (1) eBook with hands-on worksheets, brainstorming activities, checklists, and expert advice; (2) eCourse with introductory one-hour webinar hosted by the authors, case studies and practical tips, and additional eLearning opportunities, and (3) ePlan with customizable implementation and learning plan to help the board get started and take action. United and ALA Editions will jointly evaluate the offerings toward the end of FY 2021 to provide guidance and direction in developing future “Action Planners” for library boards, Friends Groups, and Foundations.

Select Future Activities and Events Through End of Quarter:

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. Libraries (and their Friends/Foundation) will be encouraged to use the event as part of their own virtual programming. United is working with the Communications and Marketing Office and the Public Policy and Advocacy Office on the messaging for Mr. Rather’s social media blasts for late January/early February. The public event will be held in early March with Booklist’s Donna Seaman interviewing Mr. Rather.

United will be launching a new series of microlearning focused on integrating advocacy into board culture for Trustees, Friends, and Foundations. The series builds off the format and structure of United’s highly successful Short Takes for Trustees training series and will be offered for purchase by individual libraries and negotiated discounts for statewide purchase. The series, *Making Our Voices Heard: Creating Board and Community Champions*, will include short training videos and accompanying resource guides.

United staff will work with a board task force to audit and assess United’s website, resources, and training opportunities as part of an overall SWOT analysis of current benefits, needs, and opportunities for statewide partnerships and membership growth. The task force will also develop a toolkit for state libraries to use in promoting/marketing statewide access to United’s digital products and/or statewide group membership benefits.

YOUNG ADULT LIBRARY SERVICES ASSOCIATION

Division Executive Director: Tammy Dillard-Steels

Budget Amount: Operating Expenses - \$641,162

Staff: 4.5

Division Membership: 3600 (approximately)

Equity Diversity and Inclusion in Focus at YALSA

Addressing Equity Diversity and Inclusion (EDI) concerns and perceptions is a priority with YALSA. In the YALSA interim strategic plan, one strategy is that EDI concepts are infused into all programs, products, activities, and education to address the cultural mismatch between today’s increasingly diverse teen population and the librarian workforce remains overwhelmingly white and female. The goal is that 100% of all programs, products, events, and education will support YALSA’s EDI statement.

YALSA scanned the internal practices of other divisions such as ALSC and ACRL to identify their patterns with recruiting volunteers, Award and List selection. The Board is working with committee chairs to examine their guidelines and process of infusing EDI in their orientation.

At the Mid-Winter Board meeting, the objective is to receive approval to create a Taskforce to analyze the survey results and generate universal guidance for all committees to incorporate EDI into their process.

Member and Stakeholder Reach:

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

During the first quarter of FY 2020, YALSA's monthly webinars attendance under the newly established Education Advisory Committee garnered over 600 registrants.

Key Activities:

YALSA's most impactful activity was TeenTober. A new, nationwide celebration hosted by libraries in October aims to celebrate teens, promote year-round teen services and the innovative ways teen services help teens learn new skills, and fuel their passions in and outside the library. TeenTober replaces YALSA's previous Teen Read Week™ and Teen Tech Week™ celebrations, allowing libraries the flexibility to celebrate all types of literacies according to their library's schedule. Library staff is encouraged to utilize this new celebration to advocate for and raise awareness of the importance of year-round teen services in libraries.

Libraries ordered TeenTober posters and bookmark digital files from the ALA Store; view and download the TeenTober Toolkit and download the free web graphics!

Select Future Activities and Events Through End of Quarter:

- **YALSA Webinar: January 14, 2020; Thursday, 2PM Eastern
How to Engage and Program for LGBTQ+ Youth**
In this webinar, learn how to better engage LGBTQ+ youth, how to program for them, and how to connect and develop relationships with them in the library. There will also be a focus on a trauma lens viewpoint to better understand LGBTQ+ youth and what they may be going through. [Learn](#) more.
- **Youth Media Awards – January 25, 2021**
Announcement of YALSA's [book award](#) winners including Alex Awards, Edwards Award, Morris Award, Nonfiction Award, Odyssey Award, and Printz Award. YALSA will also be announcing its selected book lists on its blog, [The Hub](#) in mid-January.
- **2021 Teens' Top Ten Nominees Announcement - April**
The nominees of YALSA's 2021 [Teens' Top Ten](#) book list will be announced in April during National Library Week.