ALA Executive Director’s Report to ALA Executive Board  
Prepared by Tracie D. Hall  
April 7, 2023  

GENERAL UPDATES AND HIGHLIGHTS  

As the American Library Association looks ahead to the first Annual Conference to be held in its headquarters city of Chicago since the COVID-19 pandemic began, it finds itself evidencing signs of promising recovery and need for continued adaptability as it seeks to not only fully recover its membership numbers but to push towards new, increased goals related to financial and operational performance.

Annual Conference. Almost two months away, this year’s Annual Conference will carry double weight. Along with its original slated target of 9,230 paid attendees, Annual 2023 (June 23-27) is being tasked with realizing an additional 1,800 registrants to make up for missed budget outcomes from the debut of its LibLearnX convening in January which, though extremely well-reviewed by attendees, ultimately met 76% of its registrant target and 41% of its exhibitor revenue target. Thus Annual 2023 is being asked to make up the gap for overall conference income, a requirement that requires coordinated effort across the enterprise and a more sophisticated marketing strategy that necessarily integrates careful content curation, greater social media visibility, and member to member messaging, all of which are in play. Currently off to strong numbers as the early bird registration period comes to an end, it will be critical to amplify the cost-savings available in group registration and the positionality of Chicago as a drive-to destination for cities across the Midwest and near south.

Though for now LibLearnX will continue to be the platform for robust in-person ALA Governance Institute offerings, Annual 2023 will allow for ongoing observation as to how this well-received new offering can be integrated into association officer onboarding. Attended by over 225 member-leaders, general audience members, and staff, the first AGI in New Orleans featured two 90-minute sessions, facilitated by experienced member leaders and ALA’s new parliamentarian and focused on strategic communications and financial analysis and stewardship, resulting in high survey marks and councilor’s referencing the AGI in subsequent sessions as a critical new tool in support of their preparation for service. Planning for the next installment of the institute in Baltimore next January will commence after Annual 2023.

ALA is also set to bring back its Community of Care program which launched at LLX. This initiative intended to serve as an embodiment of the Code of Conduct also debuted at LLX in January and yielded noted appreciation from conference attendees. Informed by practices emerging from the conference planning and public convening sectors, the Community of Care effort at Annual will feature an expanded team of members and staff and will continue to have the following elements:

- **Built Environment**: ALA will continue to identify conference programming settings and contexts that require higher security. Code of Conduct signage will feature prominently at the conference. New protocols have been put in place that require that vendors/exhibitors/and other conference participants sign the Code of Conduct agreement which applies to on- and offsite programming activations.
- **Social Network**: ALA staff and members will wear ribbons and that identify them as Community of Care team members able to connect conference attendees to mental health triage services and other resources and support. An ALA staff member will serve as Conference Ombudsperson and point-person for Community of Care response coordination.
- **Mental Health Support**: ALA will have a licensed mental health professional onsite or on call during the entire conference. As well, a Community of Care Quiet Room will be available throughout the conference.
Pivot Strategy Status Report

Reaching its midway mark, the ALA Pivot Strategy, created to span the fiscal years 2021-2026, still proves a salient framework for the coordination of strategy across ALA’s 30+ units and 8 divisions. As this report will show, though membership gains are slow – as to be expected in this inflationary economy in which library budgets have taken sharp hits – financial performance at the association continues to evidence discipline when it comes to spending and resourcefulness when it comes to developing new income streams and sources. There is currently over $8M cash on hand and the Executive Director and CFO are putting measures in place to create dynamic financial management systems to contain the revenue to expense ratio. Membership continues to hover at the 50,000 mark. There has been a slight (not fully 2%) decline in student membership numbers that has occurred as more MLIS programs go mostly remote. Anticipating the continuation of the trend, MRS and the Chapter Relations Office are starting to work together to strategize interventions that can create stronger connections between individual students and the association. Member-leaders can play an important role in this effort and we look forward to laying out a full plan in the next few months. Conference Services continues to expand its capacity to respond to increased expectations for hybrid offerings and to build virtual-only offerings. Navigating the two audiences is not as straightforward as it seems as ALA continues to be the convener of the largest, in-person library convening and tradeshow, and there is a well founded desire to maintain that standing as well as the benefits – professional networking, formal and informal mentorship, discovery, active idea exchange that evolves practice – that can often only be generated in a face-to-face setting. Yet, there is undeniable opportunity to expand conference markets outside the US and to deeper into the US LIS and adjacent sectors through our virtual offerings. This goal will be a priority until we have found a viable strategy for realizing this potential growth. Continued Education is still trying out new tactics to maximize its reach. Progress has been made in expanding the regional institution client base. As well, there is an effort to include CE offerings as an amenity for recipients of ALA grants, a benefit that can extend learning opportunities. The CE unit is also preparing to formally launch its brand, ‘ALA Learning’ before Annual 2023. This launch will make ALA’s online educational offerings even easier to find. Publishing and Media is working diligently to fight back against declines in overall book and product spending as library budgets constrict. Yet, there is solid evidence from the Avenue M study that members highly value the association’s publications, from American Libraries and Booklist to ALA Editions and Neal-Schuman titles. The “Free People Read Freely” sloganized merchandise is selling well as attention to censorship fights grow. Making it more available to the general public is an outcome to work towards as Banned Books Week arrives this Fall. Data, Design, and Research is on target for reaching one of its initial goals of standing up a data system that tracks and analyzes the association’s performance and strategic goal management data. The work of building and customizing a robust performance management system using the Association Analytics technology platform is making headway, with a goal of providing Executive Board members a preview at or before Annual 2023. Contributed Revenue persists in its solid performance with both the Development and Public Programs Offices leading major grant development, while the divisions are currently the locus of the most significant corporate or in-kind donations or partnerships. The Development Office has also delivered the anticipated results from the Feasibility Study authored by the Alford Group with an advisory team of members chaired by Executive Board member Christina Rodrigues, Past President Betty Turock and OverDrive CEO Steve Potash. The Executive Board voted to include a campaign and the creation of a member- and stakeholder led campaign cabinet as part of ALA’s 150th celebration activities.

Programmatic Priorities

Increasing access to literacy instruction for adults. Annual Conference will feature a mainstage program highlighting ALA’s ongoing commitment to Education and Access in the form of increasing access to literacy instruction for English and non-English speakers across the nation. In 2022, ALA joined a consortium of peer organizations led by the Barbara Bush Foundation for Adult Literacy, Coalition on Adult Basic Education, the Center for Family Literacy, the Mayor’s Office for Adult Literacy at Houston Public Library, and including the National Coalition for Literacy which ALA helped to found,
Pro-Literacy, Teaching English to Speakers of Other Languages, and others. The panel will feature Barbara Bush Foundation CEO, British Robinson; Rhea Brown Lawson, Houston PL’s executive director; and library and literacy practitioners leading this work across the country. Working with ODLOS, the Committee on Literacy, and the Center for the Future of Libraries, ALA will use this opportunity to announce a new grant opportunity for the expansion of literacy instruction through partnerships between libraries and community-based organizations engaged or vested in the advancement of literacy in high need areas.

Protecting Intellectual Freedom. Having attracted nearly 90 national and regional partners, Unite Against Book Bans campaign remains one of the most visible current anticensorship campaigns. Later this month, National Library Week will launch with its first day dedicated to showcasing the “Right to Read!” The entire week will also highlight numerous UABB resources and offerings. This lifting up of ALA’s anticensorship programming come after the Los Angeles Times announced that the Freedom to Read Foundation (FTRF) will receive its LA Times Book Festival 2022 Innovator’s Award, which “spotlights efforts to bring books, publishing and storytelling into the future.” Julia Turner, Deputy Managing Editor of Entertainment and Strategy for the Times said at the award’s announcement, “The organization is as important and relevant today as it was at its inception in 1969,” says. “We honor its continued fight against book bans and its mission to protect all Americans’ right to read and access information.” ALA is also gearing up for Banned Books Week this fall as well as continued discussion and planning around an Intellectual Freedom convening next January, both of which will be discussed extensively in upcoming board meetings. The current staff capacity in OIF has been increased with a goal of ultimately getting to 6 FTE (almost triple the number in FY 22) by FY24. Last month OIF published an ad for Deputy Director for OIF, a position that will require a law degree, and will seek to hire additional staff to expand administrative and field mobilization capacity.

Missouri and library funding legislation. Though Sen. Lincoln Hough, who chairs the Senate Appropriations Committee, vowed to restore the state funding for Missouri’s public libraries that was removed out of the House iteration of the state’s spending plan, the initial vote to defund public libraries in Missouri in late May shocked library advocates and will no doubt create a precedent that looms large given the way that libraries have been a chief target in the current divisive political arena. The Public Policy and Advocacy Office along with OIF will lead a conversation in closed executive session on strategy and planning to mitigate copycat legislation and/or any chilling effect the proposed legislation could have.

Library Services for the Incarcerated and Detained. Led by almost three dozen association members and library practitioners working in or with lived experience in this area of service, the draft of the Standards in this area is on track to be published after Annual 2023. There is also some early indication that this work, which has engaged select policymakers may have the opportunity to positively influence future legislation, a possibility ALA is continuing to monitor. Ahead of the launch of the Standards, a much-awaited updated resource page has been made available on ALA’s website. See here: Expanding Information Access for Incarcerated People Initiative | About ALA

Staffing Updates

Continuing its efforts at talent management and building staff capacity in alignment with the needs of the LIS sector, ALA has made progress in filling key positions and in launching ads for others. In the past few months, the following positions have been filled: Awards Coordinator (ALSC); Conference Deputy Director -- Content (Conference Services); Editor (American Libraries)I Marketing Manager (ALA Editions); Business Analyst (IT); and Accounting Manager (Finance). The following searches are in the final phase with candidates selected and now in the screening phase: Core Program Officer; Senior Ed.- Digital Content (American Libraries); Assistant Director, Communications (OIF); Assistant Director, Membership (OIF).

We are also pleased to note that the following senior level search committees have launched: AED-PPA; Director, CMO; and YALSA ED (Posted). The ad for the Deputy Director, OIF position which will now require a law degree and extensive background in intellectual freedom has also been posted. The Director of Institutional Advancement and Partnerships;
MRS Director; and support positions for AASL, ALSC, ACRL, HR, ODLOS, and IT are next in the association’s priority hire list and as the report that follow indicate, will support an organization and membership that continues to make strides towards progress despite these dynamic and uncertain times.

### REPORTS OF ALA UNITS

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AMERICAN ASSOCIATION OF SCHOOL LIBRARIANS (AASL)

Unit Manager:  Sylvia Knight Norton, AASL Executive Director

Unit Budget: FY23 as of January 2023

- YTD Budgeted - Revenue $244,741 and Expense $250,304
- YTD Actual - Revenue $246,804 and Expense $267,024
- YTD Budgeted Overhead $500; Actual $897

# of Staff: 4 (includes executive director, a deputy executive director, a manager, and an administrative assistant) plus there is one manager position vacant since January 2022

Revenue Stream(s) the Unit Supports:

☒ Conference Services
☒ Continuing Education
☒ Contributed Revenue
☒ Membership
☒ Publishing

Status Report on Pivot Strategy, Aligned Unit Goals:

AASL’s unit goals align with the pivot strategies to increase membership and increase revenue.

AASL is below membership projections, January 2023 down 5.7% since the year before, with total dues revenue 29% below budget (actual $107,605 vs budget $150,542). The climate for school librarians and K-12 educators in general has not improved with the 2022-23 school year as the profession reports increased stress levels and an exodus of educators according to the latest report from District Administration that identified at least five states with critical conditions. School librarians face the threats from proposed or newly implemented state regulations, censorship, and book challenges. District level supervisors for school libraries report they are unable to find enough qualified applicants to fill building level school librarian positions. The AASL Board of Directors has approved gathering information on recruitment to school library preparation programs and is exploring next steps on the need for more school librarians while also trying to address the concerns and well-being of the profession as they face daily issues.

Revenue during an AASL non-conference year is holding steady except for the delay or what may be a cancellation of an anticipated project. AASL did apply and receive a STEM-related grant and a second cohort of the AASL School Leader Collaboration continues to be sponsored by OverDrive. Registration for the next biennial conference, the 2023 AASL National Conference to be held October 19-21 in Tampa, has launched with registration numbers currently out-pacing registrations at the same time for the 2019 conference that was held in Louisville. However, those amounts are not reflected in this report as all revenue and expense for the Tampa conference is deferred to the FY24 budget.

Describe the major issues, trends, opportunities, or concerns that your unit has or is responding to at the closing of this fiscal quarter (Dec 2022 – Feb 2023)

Registration has launched for the 2023 National Conference to be held October 19-21 in Tampa. Early registration numbers are outpacing by 134% the AASL conference held in Louisville in 2019 several months before the pandemic. The conference site state for this year continues to be a concern due to political issues and book challenges. The AASL Board of Directors has reaffirmed their support for the site location and issued “Learning Together, Standing Together”
while providing incentives to the members of FAME, the state school library association to attend the conference, and an advocacy presence for all school librarians in the state.

AASL’s Educators of School Librarians Section (ESLS) is in process on research of the current practices in school librarian preparation programs and their recruitment of future school librarians in response to a need identified by the AASL Practice Committee and moved forward by the AASL Board of Directors.

**# of Members (for Divisions):** 5,079

**# of Members/non-members/other stakeholders reached during Quarter 2:**

- Post holidays, the views on the AASL website increased 13.8% with the topmost viewed pages falling within national conference, school library promotional events, and awards. The AASL National Conference registration page is the second most viewed page after the AASL landing page with 9,137 views in January alone.
- AASL has seen increased engagement on all social media platforms thanks to the work of the members using social media to promote the AASL National Conference. The School Library Event Promotion Committee each month targets events and our partnerships to involve school librarians in teaching and learning. The fastest growth of new followers is on TikTok. Engagement remains highest on Twitter, despite the increase in educators privatizing their accounts due to the political climate.
- At the AASL webinar “We Don’t Shush Here: Student Voice in the School Library,” AASL had 131 registrations with 21% attending live. AASL Town Halls are an opportunity for school library professionals to network and brainstorm around a central theme. January had 106 registrations with 31% attending live who were encouraged in the new year to reflect and set goals for their work in school libraries. The February Town Hall was a “Love Your Profession” month.
- Nine AASL Chapters (the state school library association most often not associated with the ALA Chapter so AASL is how they connect to ALA) held state conferences where AASL promotion materials had been mailed. Potential reach through all the conferences was 3,050 school librarians.

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

In response to numerous social media comments and requests from school librarians about the stress of the current crisis and the need for ALA to be seen as leaders providing support, a complimentary webinar series was presented by the ALA Office of Intellectual Freedom and sponsored by AASL. The two 90-minutes webinars on book challenges specifically focus on school libraries with more than 800 registering for part one “Challenges and Challenging Legislation” in February and the next webinar to be presented in March.

**Describe the Most Impactful Unit Activities this Quarter**

AASL’s project funded by a generous member donor provides copies of the *National School Library Standards for Learners, School Librarians, and School Libraries* published by AASL/ALA Editions in 2018 was delayed by the pandemic but the timing has been beneficial for AASL Chapters as a connection to make and meet with state decision makers for education included 34 more states opting in during Q2. AASL Chapters gave packets to Superintendent/Commissioner of Education, Principal Association, State Librarian, and Teacher of the Year. Several posted their photo ops to social media, further expanding the reach about AASL and the Standards.

In February the ALA Executive Board approved a request to designate Des Moines, IA as the site of the 2029 AASL National Conference.

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

April will be the 38th annual School Library Month celebrating school librarians and school libraries. Every April school librarians are encouraged to host activities to help their school and local community celebrate the essential role that
strong school libraries play in transforming learning. The AASL efforts for a national School Library Month were spearheaded by Lucille Thomas, chair of the School Library Media Month Committee. Thomas was appointed by President Judy King in 1983. Their work came to fruition on April 1, 1985, when AASL officials, local and national dignitaries got the first School Library Month off to a rousing start with a ceremony on the west steps of the U.S. Capitol.

AASL staff and the member conference committee are immersed in planning and implementation for the AASL National Conference to be held in October. Concurrent sessions for programs will be determined and final keynotes selected. The site visit is planned for June.

With years of AASL time, input and meetings dedicated to writing the Right to Read Act proposed by Rep. Grijalva and Senator Reed, AASL hopes to see the bill reintroduced and will prepare to then vigorously promote its passage.

AASL’s Professional Development Manager position has been vacant since January of 2022 but is on hold for ALA approval to fill. The position is designed to leverage all AASL continuing ed opportunities and is responsible for AASL serial publications, developing new continuing education/PD, and related educational programming as well as planning for the AASL conference. AASL hopes to be able to advertise, interview and fill this position in order to sufficiently on-board a new staff member before the upcoming AASL National Conference. As it is a biennial conference it is important to be able to take advantage of the opportunity to meet and better understand the needs of the school library field and the contributions to be made by our members.

ASSOCIATION OF COLLEGE & RESEARCH LIBRARIES

Unit Manager: Jay Malone

Unit Budget:

- Budgeted revenue and expense – FY23 Budget: Revenue $4,348,923 | Expenses $4,253,403 | Net $95,520
- Actual revenue and expense – FY23 January Performance Report: Revenue $701,565 (5% behind budget) | Expenses $976,890 (20% better than budget) | Net ($275,325) (43% better than budget)

# of Staff: 13

Revenue Stream(s) the Unit Supports:

☒ Conference Services
☒ Continuing Education
☒ Contributed Revenue
☒ Membership
☒ Publishing

Status Report on Pivot Strategy, Aligned Unit Goals:

Work continued on the division’s pivot strategy goals of rebuilding individual membership to the April 2020 level of 9,500 members and increasing organizational membership from the April 2020 level of 605 to 700 by the end of FY22. While the membership targets weren’t met in FY22, staff continue using webcasts and other event registration/sign-up email lists in newsletter and marketing distribution, including non-member attendees. Sending email messages about ACRL activities helps keep non-members engaged in the association and will, it is hoped, drive future membership. One area that holds promise is our work with ACRL’s Choice publishing unit as we look at ways to drive membership through their customer base of more than 50,000 individuals.
We are also currently running a special promotion to former/never ACRL organizational members (at institutions where librarians have tenure) offering a personal membership discount if the ALA (and/or ACRL) organizational memberships are renewed. The hope is that this promotion will increase both organizational and personal members in FY23 along with the traditional increase in membership during an ACRL conference year. ACRL Associate Director Mary Jane Petrowski is serving on the ALA Membership Cross Functional Team to increase collaboration on membership initiatives across the association. Work on increasing ACRL membership continues and staff will continue to monitor official membership counts as they are released.

As of the November 2022 official count, individual ACRL membership stands at 7,773, organizational membership stands at 511, and corporate membership stands at 19, for a total membership of 8,303.

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

Every two years, the ACRL Research Planning and Review Committee releases an environmental scan of higher education, including developments with the potential for continuing impact on academic libraries. The 2023 Environmental Scan (PDF) provides a broad review of the current higher education landscape, with special focus on the state of academic and research libraries. The document builds on earlier ACRL reports, including the Top Trends in Academic Libraries, published every other June in C&RL News. The 2023 Environmental Scan is freely available on the ACRL website.

Among a variety of issues, the scan highlights the continued focus of assessment efforts on student success, noting that “…recent cultural and technological shifts have pushed assessment efforts in a student-centered direction with a more holistic approach to data collection.” The scan cites a recent EDUCAUSE trends report that explores the transformation in post-pandemic higher education toward a focus on the student experience.

To assist academic libraries in navigating this continued focus on demonstrating value, ACRL launched the new Academic Library Advocacy Toolkit in Q2. Developed by a joint task force comprised of members from ACRL’s New Roles and Changing Landscapes and Value of Academic Libraries goal-area committees, the Toolkit is a curated collection of resources that can help equip academic library administrators and library professionals with the resources they need to advocate for the value, roles, and contributions of academic libraries to their campus communities. The Academic Library Advocacy Toolkit was created in response to current and concrete pressures many academic libraries are facing, including challenges related to budgets, a diminished workforce, professional roles, and more.

ACRL members and staff continue to monitor the higher education and academic library landscape and adapt/develop new programs and services to help the academic library community in addressing a variety of issues. The ACRL 2023 Conference, held March 15-18 in Pittsburgh and virtually, featured programming touching on a variety of important issues including equity, diversity, inclusion, and accessibility; information literacy; data management and literacy; scholarly communication; student success; workplace development; and many more. Work is also ongoing on several additional projects, including reevaluating the ACRL awards program through the dual lens of sustainability and equity along with membership recruitment and retention initiatives.

# of Members (for Divisions): 8,303 (November 2022 official count)

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

- ACRL 2023 total attendance: 3,747 attendees, exhibitors, staff, suppliers, and press
- Paid online learning attendance: 201 individuals
- Newsletter total opens: 156,017
- Print and ebooks sold/distributed: 1,607
- Journal website total views (C&RL, C&RL News, RBM): 788,025
- ACRL website total visits: 170,341
- Facebook: 42,711 impressions; 2,161 engagements
- Instagram: 9,590 impressions; 618 engagements
- Twitter: 58,160 impressions; 1,692 engagements
- YouTube: 6,400 views; 901 hours of watch time

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

Although there has been a decline in overall ACRL membership over the past year, there has been high engagement across ACRL’s online platforms and events.

- ACRL’s Online Learning program offered one live webcast and one three-part webcast series during this report period. 201 individuals participated in e-Learning focusing on universal design and redesigning library spaces. Upcoming topics include active learning techniques, strategies for adult learners, and scholarly communication.
- Five new ACRL books were published during Q2 of FY23 and were promoted for purchase to members and other stakeholders. 995 print and individual-use ebooks were sold, along with 612 institutional ebook copies via distributors.

**Describe the Most Impactful Unit Activities this Quarter:**

- **ACRL 2023 Conference Update**
  The ACRL 2023 Conference, “Forging the Future,” was held March 15-18, 2023, in Pittsburgh and virtually. The conference hosted 2,140 paid in-person and 717 paid virtual attendees, including 1,109 first time attendees, for a total of 2,857 total paid attendance. Paid registration revenue came in at 106% of budget. Total attendance of 3,747 included paid attendees, exhibitors, staff, suppliers, and press. ACRL also awarded 100 scholarships for the conference in six categories, worth $89,081.
  
  ACRL 2023 included keynote speakers Rebecca Nagel and Heather McGhee; more than 300 live educational programs including invited presentations, panel sessions, contributed papers, workshops, lightning talks, roundtable discussions, and poster sessions. Virtual registration included live streams of the opening and closing keynotes, hybrid programs with live chat, virtual-only presentations, and networking and wellness opportunities. Recordings of the majoritity of virtual and hybrid presentations are available to attendees for the next year.

  [Choice Launches LibTech Insights](https://acrl.ala.org/acrlinsider/choice-launches-libtech-insights/)

  [Choice Podcasts Named to Publisher Podcast Awards 2023 Shortlist](https://acrl.ala.org/acrlinsider/choice-podcasts-named-to-publisher-podcast-awards-2023-shortlist/)

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**ASSOCIATION FOR LIBRARY SERVICE TO CHILDREN - ALSC**

**Unit Manager:** Alena Rivers – Executive Director

**Unit Budget:**

- Budgeted revenue and expense: $695,189/ $601,019
- Actual revenue and expense: $ 597,503/$545,342

**# of Staff:** 5 and 1 shared position

**Revenue Stream(s) the Unit Supports:**
Membership

Status Report on Pivot Strategy, Aligned Unit Goals:

ALSC has continued to consider activities as they relate to the three Pivot Strategy Aligned Unit Goals. Activities are assessed to ensure maximum impact and alignment with the Pivot Strategy goals. The ALSC Board of Directors has been working to develop the 2023-2036 ALSC Strategic Plan, which will ensure alignment with the ALA Pivot Strategy. Updated Pivot Strategy goals for ALSC will be determined alongside the development of the Strategic Plan.

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

  ALSC continues to consider ways to expand and capitalize on existing programming and expertise, including expanding our work in children's book evaluation and the Youth Media Awards. We are also intently thinking about virtual offerings to reach all members with opportunities previously only available in-person, such as through virtual conferencing and online seminars. ALSC CE continues to emphasize the ALSC Core Competencies as the foundation of children's librarianship and integrate those into our CE work - and beyond.

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

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

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

  In January 2021 the ASLC Board approved the recommendations of the Diversifying Revenue Streams Task Force that focus on high value, high interest, proprietary content, and create an entrepreneurial culture among members and committees. A working group has been formed to further develop and prioritize the work of the task force. Recommendations were considered by the ALSC board in June 2022 and the task force is considering new areas to expand Día product lines. Of note, ALA Editions and ALSC partnered on a publication honoring the Newbery award, titled *The Newbery Practitioner’s Guide: Making the Most of the Award in Your Work*. ALSC is also considering new areas to expand Día product lines.

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

Many discussion topics that ALSC has engaged in or addressed with our membership over the last several quarters remain prominent, and issues focused on censorship, collection development attacks and hiring have been elevated to the forefront.

- **Censorship and Book Challenges** – This quarter, the ALSC committees, including the Public Awareness and Advocacy Committee and the Intellectual Freedom Committee, have shared information related to reconsideration and book challenges. Public and school libraries across the country are continuing to see an uptick in book challenges and new laws are creating unease among librarians. Libraries are watching and speaking up against legislation that could expand opportunities for censorship. Libraries throughout the country are seeing an increase in both direct reconsideration requests and indirect censorship tactics, including patrons purposefully hiding certain materials. These behaviors disproportionally target our BIPOC and LGBTQIA+ colleagues, authors / illustrators, and readers.

- **Collection Development Attacks** - Censorship trends are expanding beyond reconsideration requests to include purchase demands from library staff and patrons. These demands highlight a disconnect between current
collection development policies and harmful and/or inaccurate materials. Public and school library workers continue to struggle to navigate these emotionally charged interactions within current policies, if applicable, and without administrator or stakeholder support.

- Hiring - Areas around the country are struggling to fill youth staff positions. Library leadership around the country are continuing to revisit the question of education and experience requirements for professionals working with youth which is becoming increasingly directed by staffing shortages.

**# of Members (for Divisions): 3,407**

**# of Members/non-members/other stakeholders reached during quarter (for all Units):**

3,407 Members
64,148 – Impressions on Twitter made 64,148
12,237 – Reach of our Facebook posts (it took almost a full month to get access to FB, and we do not post as aggressively as we have with current staffing)
116 - Current Registration for the 2023 ChiLL in Dayton, OH

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

The most recent Q2 reports, from January 2023, reflect a 5.92% decline in overall membership; this is consistent with trends we are seeing comparable in ALA divisions across the board. We believe Membership will continue to be a point of struggle, as we do not currently have a staff member dedicated to concerted member recruitment and retention; we look forward to filling that role soon.

- Hosted the YMA Press Conference at 2023 LibLearnX, with a large draw both onsite and virtually.
- Engaged 165 members and nonmembers in ALSC’s virtual Notable Children’s Book discussions.
- Engaged 28 members and nonmembers in ALSC’s virtual Notable Children’s Recordings discussions.
- Enrolled 13 members and nonmembers in the pilot ALSC Book Chats program.

**Describe the Most Impactful Unit Activities this Quarter**

- **Youth Media Awards Press Conference (YMA) –** The 2023 YMA announcements took place on Monday, Jan. 30, 2023, at 8:00 a.m. CT, during LibLearnX. ALSC worked with a project management consultant, Aimee Strittmatter, and other ALA units and award committees in preparation for the announcements. Among others, the YMA’s include the Newbery, Caldecott, Printz, Coretta Scott King Book Awards, and affiliate book award announcements, and provide a guide for parents, educators, librarians, and others in selecting the best materials for youth. The awards are selected by committees composed of librarians and other literature and media experts, and they encourage original and creative work in the field of children’s and young adult literature and media.

The YMA webcast streamed successfully to ala.unikron.com and ALA Facebook Live with 21,103 views combined. Specifically, Unikron reported soon after the announcement concluded that morning, the webcast had 12,803 views Facebook had reached 8,300 views. As of 2/3/2023, there had been 22,684 webcast views on ala.unikron.com, not including updated Facebook numbers.

- **2023 YMA Book Chats -** ALSC piloted informal book chats to build on the excitement of the YMA Press Conference and to pilot a potential revenue driver with the organization. While enrollment was low, those who participated enjoyed the conversations. ALSC plans to offer the chats again next year with an eye toward building enrollment.
Select Future Activities and Events Through End of Next Fiscal Quarter:

- **2023 Children's Literature Lecture** - ALSC hosts the annual Children's Literature Lecture in the spring; this fall, we determined Dayton Metro Library as the host site for the 2023 lecture, featuring Bryan Collier, in conjunction with University of Dayton.

- **El día de los niños/El día de los libros (Children's Day/Book Day)**, commonly known as Día, is a celebration every day of children, families, and reading that culminates yearly on April 30. The celebration emphasizes the importance of literacy for children of all linguistic and cultural backgrounds. Día is a nationally recognized initiative that emphasizes the importance of literacy for all children from all backgrounds. It is a daily commitment to linking children and their families to diverse books, languages and cultures. Along with a free, downloadable booklist, the Día website features a national database that showcases all types and sizes of Día public programs at libraries and community organizations throughout the year to celebrate Día. The information is searchable on the national Día map and display on the website.

- Beginning in March ALSC will support the promotion of the Stories Beyond Borders: A Chinese American and Diasporic Reading List – The Chinese American Librarians Association (CALA) partnered with the Young Adult Library Services Association (YALSA) and collaborated with the Association for Library Service to Children (ALSC)'s Quicklists Consulting Committee to create a reading list for youth audiences centering Chinese American voices.

- **Summer Reading List** - ALSC's Quicklists Consulting Committee updated ALSC’s Summer Reading Lists with new and exciting titles. The lists are in the production process and will include book titles to keep children engaged in reading throughout the summer. Four Summer Reading book lists will be available in April for Birth- PRESCHOOL, K-2nd, 3rd- 5th and 6th-8th grade students.

### CHAPTER RELATIONS OFFICE

**Unit Manager:** Michael Dowling

**CRO Unit Budget** (through January 2023)

- **Budgeted revenue and expenses** revenue $0 expenses $72,569
- **Actual revenue and expenses** revenue $6,424 expenses $42,057

Revenue has exceeded year-end expectation of $3,000 with reimbursement for staff time as subgrantee on the ‘Communities for Immunity’ project underwritten by the CDC and IMLS. Expenses are also below budget due to ALA Covid Relief grant support. Expect the year with revenue as is, and to have expenses reduced by at least $25,000 with new Mellon grant support.

**# of Staff:** 1.5

**Revenue Stream(s) the Unit Supports:**

- Conference Services
- Continuing Education
- Contributed Revenue
- Membership

**Status Report on Pivot Strategy, Aligned Unit Goals:**

Conference Services
Supported LLX Association Leaders Forum which included topics such as advocacy, membership and EDI for chapter and association leaders. Sent Annual Conference promotions from Conference Services in late January through February.

**Continuing Education**

Provided a New Chapter Leaders webinar in early January for all chapters whose new leadership were inaugurated during the fall. Target President-elects and Presidents but attendees also included Chapter Councilors and Chapter staff. In advance of LLX also organized a new Chapter Councilor webinar. Jon Martin, Program Manager presented at Advocacy Hour for Michigan Library Association on ALA support for state chapters.

Continued trainings for Chapters on new OneClick advocacy platform and state level Bill Track system. Provided One-on-one One Click Politics onboarding to 10 chapters (GLA, AzLA, NDLA, TxA, CaLA, SCLA, MdLA, FLA, NYLA, CoLA)

**Membership**

Assisted thirteen Chapters in creating state level campaigns in January and February against adverse legislation. PPA amplified these efforts by sending out to all ALA advocates in these states.

Hosted ALA Student Chapter Leaders Meeting which included topics such as National Library Week, Scholarship Opportunities and Unite Against Book Bans. Continued with managing joint student membership program to ensure Chapters are informed of new student members and their share of membership revenue.

**Contributed Revenue**

- Communication with 77 Covid Library Relief grantees finishing up the 2nd Covid Library Relief grants to gather their final reports. Started planning for new Mellon Foundation grants.

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

- Concern over censorship legislation being passed in state legislation across the country.

- Competition for assisting Chapters with advocacy support.

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

- 700 Chapter Leaders through ALA Connect, majority of them are ALA members.

- Student Chapter Leaders as 60 Chapters.

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

- Provided Chapters information on ALA and units on opportunities and initiatives to reach beyond ALA members.

Describe the Most Impactful Unit Activities this Quarter:

- Support of state level advocacy efforts through consultation with OIF, PPA, and state leaders.

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

- Continued support for Chapter legislative efforts.

- Collaborating with Conference Services on getting Chapters to help promote ALA Annual.
CHOICE

Unit Manager: Rachel Hendrick

Unit Budget:
- Budgeted revenue and expense: $908,080/$1,102,541 (YTD January performance report)
- Actual revenue and expense: 988,927/998,702 (YTD January performance report)

# of Staff: 17 FTE and one shared position

Revenue Stream(s) the Unit Supports:
☒ Publishing

Status Report on Pivot Strategy, Aligned Unit Goals:

In January 2023, Choice launched its second content vertical, LibTech Insights (LTI). This multimedia blog features practical and actionable content about technology trends in academic libraries and across campus. With this content vertical Choice hopes to reach a wider audience across higher education and attract new advertisers. In February, we had over 2,000 signups for the LibTech Insights enewsletter and an average of 525-page views per week. As part of the LibTech Insights brand, our advertising manager has developed a new vendor-fair webinar program to better connect database and other technology providers with their customers. The format is twenty-minute demonstrations of library technology products stacked together in a single morning or afternoon. This program is designed to attract new advertisers who have not done a webinar with us before. The benefit for the audience is the opportunity to see a number of product demonstrations in one sitting.

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

Choice’s Toward Inclusive Excellence’s (TIE) Editor in Chief, Alexia Hudson-Ward, interviewed Dr. Rasul Mowatt and Dr. Davarian L. Baldwin about the recent attacks on the Advanced Placement (AP) African American Studies course. This podcast, In Dialogue with Dr. Rasul Mowatt and Dr. Davarian L. Baldwin on the History and Import of Black Studies, discusses the importance of Black studies as an intellectual tradition. This feature is just one of the pieces on the TIE platform that discusses Florida Governor Ron DeSantis’ attack on the African American Studies curriculum in Florida high schools. On Feb 1, TIE published Politicians’ Attacks on AP African American Studies Are Anti-Democratic, which calls for scholars and librarians to “harden our commitment to research, writing, and presenting the facts against the onslaught of attempts to eliminate any group’s history.”

# of Members/non-members/other stakeholders reached during quarter:
- Subscriptions: 1,317
- Newsletters: 8,500 (unique subscribers)
- Podcast: 3,200
- Webinars: 5,750 (not unique)

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

The LibTech Insights (LTI) only launched on January 22, 2023, but it is already showing strong engagement with readers across the library and information services sector. The average page views hover around 600-page views per week, with the most popular posts having to do with designing accessible user experience and ChatGPT/AI. The LibTech Insights enewsletter began with a circulation with over 1,900 contacts and has grown by over two-hundred contacts since launch.
Our Toward Inclusive Excellence (TIE) enewsletter has a circulation of over 700 contacts, a Twitter reach of over 82,000, Facebook reach of over 12,000, LinkedIn reach almost 3,000, and Instagram reach of over 7,000. TIE posts saw an average of 688-page views per week this quarter (a 28% increase from Q1). The TIE podcast saw an average of 850 plays per week this quarter (a 32% increase from Q1).

Choice360 engagement was down slight across all pages this quarter while enewsletter engagement was up slightly across all newsletters. Webinar attendance was also down slightly due to increased competition from live events.

**Describe the Most Impactful Unit Activities this Quarter:**

The most impactful thing Choice did this quarter was to launch the LibTech Insights content vertical. This not only provides readers actionable, professionally written content about current topics in the academic library technology space, but also has attracted new readers and advertisers to ALA.

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

Upcoming webinars:

- *One Tool, Many Applications: Collection Assessment for Changing Times*, sponsored by Resources for College Libraries
- *Is it worth it? Weighing the benefits of research data management infrastructure for the library*, sponsored by Figshare

We are watching the Internet Archive lawsuit very carefully and are planning coverage of that on the LibTech Insights content vertical.

Choice will be moving our email server to the @ala.org server and integrating some of our IT operations. This will put all Choice employees on the same email domain as the rest of the ALA staff and will save the organization some money on operations costs.

**COMMUNICATIONS AND MARKETING OFFICE (CMO)**

**Unit Manager:** Payal Patel, Interim Director

**Budget Amount (Overall Revenue/Expense):** Approx. $600K from general fund and grant accounts

**# of Staff:** Five (four full-time, one part-time)

**Revenue Stream(s) the Unit Supports:**

- ☒ Conference Services
- ☒ Continuing Education
- ☒ Contributed Revenue
- ☒ Membership
Describe the major issues, trends, opportunities, or concerns that your unit has or is responding to at the closing of this fiscal quarter:

Through the second fiscal quarter, CMO continues to react to media inquiries regarding censorship, book banning, and general inquiries about library trends. The need for media relations capacity was recognized and the goal to have a media relations agency in place before the end of the second fiscal quarter was met. Mekky Media Relations (MMR), a Chicago based public relations firm, was selected to support various initiatives, such as LibLearnX, Libraries Transforming Communities, National Library Week and Annual Conference. With MMR onboarded, there is an opportunity for ALA to be proactive in securing press opportunities that will build recognition for ALA, its mission and its work, as well as drive registration for annual conference.

Some of the trends we noticed this quarter was a renewed interest in the safety of libraries and drug-related activity as libraries in Colorado temporarily closed due to meth contamination. Another trend we are monitoring is a Vermont college library’s decision to move completely digital.

Describe the Most Impactful Unit Activities this Quarter

CMO kicked off its partnership with Mekky Media Relations in January and immediately engaged them in supporting the LibLearnX event in New Orleans, where they helped draft press releases and pitch stories to local drive markets. A member of MMR attended LLX to assist with onsite media efforts and provide important support in editing and reviewing press releases for the Youth Media Awards. Stories related to YMA winners were picked up by the AP, USA Today, and NPR.

In January, ALA’s announcement of the $5.5 million Mellon grant was offered to the Associated Press as an exclusive. The AP story gained traction on ABC News, US News and World Report, among other outlets throughout the country.

ALA spokespeople continue to make appearances in the press to discuss book banning and the role of libraries in the community. ALA President Lessa Kanani’opua Pelayo-Lozada was interviewed for a Q&A with Teen Vogue, “American Library Association President: Librarians Are Facing Harassment.”

President-elect Emily Drabinski was interviewed for The New York Times on a piece about libraries and TikTok, “Librarians Are Meeting Younger Readers Where They Are: TikTok”

In January 2023, ALA partnered with NBC’s Chicago Today for a monthly banned book club segment. This idea stemmed from a previous segment during Banned Books Week; the hosts and producers were subsequently interested in continuing the conversation on banned books. As a part of this press opportunity, Executive Director Tracie Hall will appear on the program each month to reveal the book of the month and amplify anti-censorship messaging.

Deborah Caldwell-Stone, director of OIF, continues to engage with the press on censorship and intellectual freedom. Notably, she was interviewed by The Washington Post at LibLearnX: “Culture wars in stacks: Librarians marshal against rising book bans.”

ILoveLibraries.org

During the period from December 1, 2022, to February 28, 2023, ilovelibraries.org (ALA’s public facing website) netted 60,414 total page views.

These were our top 10 most viewed articles:
ALA Unveils The 2023 Youth Media Award Winners (Jan. 30, 2023)

Five Reasons Everyone Should Have a Library Card (Sept. 1, 2020)

Stephen Colbert Is Confounded By This Library Potato Mystery (Jan. 22, 2021)

Take Virtual Tours of These Stunning Libraries (March 18, 2020)

Valentines For Library-Lovers (Feb. 11, 2020)

A Love Letter To Libraries (Feb. 17, 2023)

Helena Bonham Carter Named First Female President Of The London Library (Nov. 18, 2022)

U.S. Book Challenges Update (Jan. 13, 2023)


150 Years Of Los Angeles Public Library (Dec. 16, 2022)

Social Media

ALA and I Love Libraries Social Media Metrics

ALA and I Love Libraries posts promoting awareness about and advocating for the freedom to read received 442,378 impressions, 17,506 engagements, and 5,564 link clicks during this period.

Instagram carousel posts promoting I Love Libraries reporting on book banning were particularly popular, receiving 48,934 impressions; 3,917 likes; 94 comments; 1,436 shares; and 420 bookmarks.
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<th>Impressions</th>
<th>Engagements</th>
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<td>21,995 (+124%)</td>
<td>10,290 (+138%)</td>
</tr>
</tbody>
</table>

**I Love My Librarian Award**

CMO manages the annual I Love My Librarian Award, which invites all members of the general public to nominate librarians for outstanding service in their community. ALA received more than 1,500 nominations from library users for this year’s award, which demonstrates the breadth of impact of librarians across the country. This year’s award recipients included three academic librarians, three public librarians and four school librarians. The recipients were honored during the welcome reception at LibLearnX in New Orleans.

**Unite Against Book Bans**

CMO plays a key role in supporting the Association’s new Unite Against Book Bans campaign, launched on April 4, 2022. Among CMO’s responsibilities and efforts are: creating, maintaining, and updating the UABB website; creating and posting social media content; and supporting activities to reach the campaign’s goals.

**ALA Annual Conference Marketing**

CMO continues to assist with marketing ALA conferences, including strategy, website, email marketing, and placement of digital ads. For LibLearnX, ads placed on the Feathr digital ad platform garnered 218,224 views, 1,702 clicks, and 177 conversions. So far, Feathr ads placed for ALA Annual 2023 have garnered 47,446 views, 242 clicks, and 941 conversions. Facebook ads have generated 20,527 impressions and 158 clicks.
ALA Media Relations

The following numbers are the approximate total articles mentioning the American Library Association (ALA) captured by ALA’s monitoring service Cision. Please note that the circulation rate is calculated using the number of articles/mentions multiplied by the monthly unique visitors for each media outlet’s website.

Per the News Media Alliance (formerly the Newspaper Association of America), more than 1,300 daily newspapers and 5,700 weekly newspapers in the United States, so the following placements should be viewed as a snapshot of coverage.

Overall Media Snapshot for Dec. 1, 2022 - Feb. 28, 2022. Please note that this data reflects the quarter and does not include the data on the recent announcement of the 2022 Book Banning data that was released at the end of March 2023. At the time of the creation of this report, press was still continuing.

12,400 articles/mentions

Coverage Summary

9.9 billion in circulation
$15.4 million in publicity value

Upcoming Events

April | National Library Week
June | Annual Conference
CONFERENCE SERVICES

Unit Manager: Earla Jones

Unit Budget:

- LLX – Budgeted Revenue/Expense: $1,778,300/$1,530,593
- AC – Budgeted Revenue/Expense: $5,303,100/$4,072,521

# of Staff: 6 staff (8 positions)

Revenue Stream(s) the Unit Supports:

☒ Conference Services

Status Report on Pivot Strategy, Aligned Unit Goals:

Meet revenue targets for Annual Conference through expense management, sound budgeting, stronger communications and controls, goal setting and performance management. The areas of focus this quarter include:

- Continue cross collaborations with CMO, Publishing, and Membership, leverage addition of Deputy Director with focus on content and attendee engagement
- Securing facility, hotel, venue, and vendor contracts that protect ALA in the post-Covid landscape
- Evaluate the future scope for the AC, including destinations, size, and components

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

As the Annual Conference has solid programming in place, the primary opportunity and focus is on exceeding financial goals in order to meet overall FY23 budget goals for the unit.

- Meet financial goal for registration of $184,575 gap created by LLX shortfall, for total of $2,741,775.
- Meet financial goal for exhibits of $517,400 gap created by LLX shortfall, for total $2,649,900.
- Meet goal of 9,230 (11,000 stretch goal) paid registrants (revenue goal takes precedence over number).
- Meet sponsorship and sales $2,132,500 and advertising goals of $240,000.

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

Event marketing statistics reveal that February 15 - March 20 and using our list of approximately 73K + segmented lists, we delivered 339,453 *emails.

There were 114,091 ppl who opened (33.6%) and 5,760 (5%) clicked thrus, resulting in unique Annual Conference website visits.

*4 General, 7 Segment eblasts

- The low number of click thru can be because we’re finding that many people don’t click thru until much of the conference agenda has been added to the website. For instance, when the Preliminary Program was announced, the amount of click thru was the 2nd highest number after the Registration is Open eblast. It will, continue to pick up as we move forward.

- Also, note that this includes 4 eblasts to our list of 73K, and 7 segment emails that are delivered to smaller distribution lists.
Narrative Description Members/non-members/other stakeholder engagement:

The marketing and promotion strategy to engage the ALA members and constituents continued this quarter for the upcoming Annual Conference, with emphasis on group as well as individual registration. Marketing efforts include asset and toolkit creation; engaging internal and external marketing partners and amplifiers; social media and increased use of video; collaborative promotion with host city. CMO provides support through digital advertising; email marketing copy; media pitching; on-site social media and external media support; ongoing consulting/advisory role, including prioritization of opportunities. CMO has secured the services of Mekky Media Relations for general ALA and conference marketing efforts.

ALA CMO and Mekky Media will work together to position ALA as a leading convener and ALA Annual Conference as the leader in the library space to gather and address key and emerging issues for the field by highlighting its commitment to advocacy for libraries and the profession, diversity, education and lifelong learning, equitable access to information and library services, intellectual freedom, literacy, safety, and security. Tactics will include (but not be limited to):

- Casting a wide range of pitches to key print/online/broadcast media as well as industry publications, to show the unique attributes of ALA and the impactful/relevant issues addressed at ALA Annual Conference
- Showcasing the expertise of key leaders within ALA through interviews, bylined articles and offering commentary on a variety of issues and topics pertinent to libraries, literacy, and intellectual freedom
- Showcasing the impact of ALA’s work by spotlighting ALA Annual Conference content and issues addressed
- Supporting the drive to increase sales (registration, exhibits, and sponsorship)

Targeted audiences:

- All ALA members
- ALA prospects and non-member customers/registrants for other events
- Other members (Trustees, Retirees, Support Staff, Students)
- Exhibitors and vendors
- Regional/drive-in prospects (in collaboration with state chapters, LIS Schools, Library Directors)
- Regional/drive-in student prospects
- Library directors and others who can drive group registration
- State chapters who can drive group registration
- LIS Schools who can drive group registration
- International prospects
- Prospects looking for a virtual option with the Digital Experience
- E-Learning
- Lapsed members

Describe the Most Impactful Unit Activities this Quarter:

January 2023 – Produced the first in-person LibLearnX: Library Learning Experience in New Orleans, LA. A preliminary evaluation summary will be presented during the April Executive Board meeting based on the data received so far. [https://www.alaliblearnx.org/](https://www.alaliblearnx.org/)

- LLX Overall Evaluation Results
- LLX Exhibitor Evaluation Summary
- AGI Evaluation Summary
1. January 2023 – Focused marketing began, and registration opened for the ALA 2023 Annual Conference
   https://2023.alaannual.org/

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

On February 15, 2023, Conference Services launched registration, marketing, and promotion for the annual conference. The official dates are June 22-27, 2023. The conference will take place in Chicago, IL with an original target of 9,230 registrants and now a stretch goal of 11,000 with a focus on recapturing revenue not achieved for LLX. Event highlights include:

- Educational programming, created and curated by library professionals
- News You Can Use Sessions with updates that highlight new research, innovations, and advances in libraries
- Author speakers and featured thought leader sessions
- The Library Marketplace with more than 550 participating exhibitors and nine LIVE Stages
- Presidents’ and Chair Programs
- Enhanced Poster Session
- The Digital Experience with curated sessions live-streamed for registrants
- Networking opportunities

CONTINUING EDUCATION

Revenue Stream/Division Manager: Daniel Freeman

Budget Amount (Overall Revenue/Expense): $695,000/$610,032

# Of Staff: 2

Revenue Stream or Division:

☒ Continuing Education

Status Report on Pivot Strategy, Aligned Unit Goals:

The CE unit supported units across the association and continued leading centralization and standardization of CE across ALA while also offering a full schedule of events.

- Progress in standardization across ALA in several areas:
  - Facilitated over $50,000 in bulk and institutional transactions for multiple ALA units.
  - Increased standardization around accessibility in online events, including processes for transcription, captioning, AASL interpretation and language around the availability of these services.
  - In collaboration with the Continuing Education CFT, launched new ALA-wide free-event policies that will enhance ALA member benefits.
- Entered into contracts with five presenters for a new member exclusive product. ALA Inspire will feature prominent presenters offering insights into important LIS topics and supports the pivot strategy by driving revenue and membership.
- Generated revenue through new streams via our partnerships with YALSA, FTRF, and the Sustainable Libraries Initiative, and continued the successful partnerships with San Jose State University and the
Music Library Association. This supports the pivot strategy by increasing efficiency, driving revenue, reducing expenses, increasing collaboration, and supporting membership.

○ Continued to assist Core and RUSA in marketing their online events, helping them to drive registration and related revenue. This supports the pivot strategy by driving revenue and division membership.

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

The CE unit continues to develop initiatives in the following areas of opportunity: Partnerships with state library agencies and other large institutions; member-exclusive content that can also be sold to the general public; collaboration with the membership office to create synergy between membership and eLearning marketing; revenue generation from new event formats including a “crash course” series; custom webinars on Intellectual Freedom; an anti-racist library services course; and development of a new certification program.

With the increase in pro-censorship legislation and political activity, many ALA registrants are motivated by a strong desire to fight these efforts and learn about how to use the library as a forum for free information access. This is informing product development and acquisition strategy as well as the effort to create an association-wide strategy for free events.

In January 2023, CE led the adoption of a new association-wide approach to free events that emphasizes a bigger proportion of these events as a member-exclusive benefit, maximizing the strategic benefit of these events for ALA.

# Of Members/non-members/other stakeholders reached during quarter: Over 23,000 have created accounts on the eLearning site since it launched in November 2021; over 40,000 reached through marketing.

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

Use of the ALA eLearning site and the unit’s services are expanding to greater collaboration and centralization across the association and the creation of enhanced benefits for membership.

- The CE/YALSA partnership is underway, and has already generated three eCourses, three paid webinars and one free webinar. In this very early stage, the events have already generated over $5,000 in revenue, already on pace to surpass YALSA’s CE revenue in FY22, despite starting halfway into the fiscal year.
- CE has continued to partner with units across ALA to help offer training on intellectual freedom:
  - The unit helped to facilitate the two-part series *Addressing Challenges in America’s School Libraries*, co-sponsored by OIF and AASL.
  - Through the YALSA partnership, the unit is facilitating and marketing *Under Scrutiny: Helping Staff Feel Safe and Empowered in the Face of Book Challenges*, co-sponsored by AASL, ALSC and PLA.
  - We are concluding a custom five-part series in partnership with the Massachusetts State Library, which generated $15,000 in revenue. This lays solid groundwork for similar additional collaborations.
- In partnership with the Sustainable Libraries Initiative, the new eCourse *Sustainable Librarianship: Core Competencies and Practices*, has generated over $12,000 in revenue.

Describe the Most Impactful Unit Activities this Quarter:

- Entered into a $100,000 contract with the Massachusetts Library System to offer discounted licenses for two new certification programs that we will be building with instructional designers and subject matter experts. In addition to the money from Massachusetts, we will be promoting similar agreements with other state agencies, consortia, and other large institutions.
- The launch of the YALSA partnership has already increased synergy and reduced duplication of effort. Staff outreach to potential instructors is underway and several new events are imminent.
• As of the end of the second quarter, sales are at approximately $282,000, about 88% of the year-to-date budget, improved from 80% at the end of the first quarter. We anticipate closing the gap by the end of the fiscal year.
• Using policies recommended by the CFT and adopted by eLearning stakeholders, CE has facilitated several large bulk purchases, generating revenue through events from the CE and other units. To date, these bulk sales have generated a total of nearly $140,000 in revenue that has been shared with ALSC, AASL, RUSA, PLA and HRDR.
• Entered into agreements with several instructors and internal partners to create lectures for ALA Essentials for Library Workers (formerly called Core Competencies for Library Workers), with a plan to launch this license-based program during the summer.

Select Future Activities and Events Through End of Next Fiscal Quarter:
• CE will be adding to the promising crash course series with a programming crash course, and we are discussing crash courses in EDISJ, Customer Service and Library Marketing.
• The launch of the first installments of the ALA Inspires member-exclusive series.
• Contracting with instructional designers and subject matter experts to build the new certification program.
• Building content for the Core Competencies for Library Staff package, a primer series for new library staff—mostly paraprofessionals—that will provide an overview skillset.
• Selecting a vendor to build the new project management system.

CORE: LEADERSHIP, INFRASTRUCTURE, FUTURES

Julie Reese, Interim ED

Unit Budget: 415
• Budgeted revenue and expense: 421,917 / 414,959
• Actual revenue and expense: 323,612 / 370,710

# of Staff: 4

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

Status Report on Pivot Strategy, Aligned Unit Goals:
The Core Board met on February 10, 2023 and voted to approve the [Core Strategic Plan 2022-2025](#).

Strategic Area 1: Membership and Value to Members
Make Core a premier choice for the library community and build strong professional networks by attracting and retaining members.

Goals:
1. Develop overall member engagement and public relations campaign
2. Attract and retain members based on a target goal that takes declining ALA membership into account and explore new models for institutional membership
3. Influence the profession and provide positive member experiences

**Strategic Area 2: Career Building and Recognition**

Help members develop skills throughout the course of their careers and recognize and support professionals at all stages.

**Goals:**
1. Develop overall member engagement and public relations campaign
2. Offer continuing education programs that enable graduating library school students, career professionals, and aspiring library staff to be more competitive in the job market or for promotion and to meet the needs of hiring managers.
3. Define a cycle for in person and virtual professional development balancing topic depth, schedule, and member connections.

**Strategic Area 3: Evaluate and Adjust Core’s Structure**

Core’s structure, including sections, committees, and projects will be evaluated and adjusted based on the needs of members and communities.

**Goals:**
1. Ensure that groups at all levels of Core are functioning efficiently regarding size, membership, areas of focus, and projects.
2. Align organizational infrastructure and practices to create efficiencies and standardized expectations.

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

- Due to staff attrition, the previous 6 full-time staff positions have shrunk to 4 positions just within the last few months. Staff are working hard to provide the same level of support despite the challenges. A Membership and Marketing Manager is expected to begin in April.

- The decline in our membership numbers continues to improve. The challenges we faced merging three divisions into one during the worst of the pandemic were visible in double digit declines, which we have now halved. In September 2021, we had lost 16% of our membership from the previous year, while in January 2023 the year-to-year decline was down to 8%. In November 2022, we lost only 2 members, so we are seeing continuous improvement in this area. We believe this is due in part to new member benefits, such as adding our first software sandbox for members to learn new CE skills and the opportunity to present at and/or attend the inaugural Core Forum 2022 held in Salt Lake City, Utah, as well as a focus on communication.

- We are hopeful that ALA will be able to implement a plan to alleviate our biggest membership and marketing challenge, which is our inability to contact one-third of our members using the Informz email marketing software because they have unsubscribed from all ALA emails there.
- Webinar registrations. Members seem to be more engaged and sections are starting to contribute more content ideas.

- Our Library Resources & Technical Services (LRTS) journal became open access in January 2023. All three of the division’s journals are being migrated to ALA’s journal platform and the first issues will be released in Q1 of FY24. As a result, journal expenses will increase in FY24, so we are working toward increasing our campaign for open access donations.

# of Members (for Divisions): 4,405

# of Members/non-members/other stakeholders reached during quarter (for all Units):

Produced:

- 6 Fundamentals of... web courses reached 102 individuals
  - 18 Core Members
  - 21 ALA Members
  - 63 Non-Members

- 5 paid webinars reached 185 individuals and groups
  - 88 Core Members
  - 43 ALA Members
  - 38 Non-Members
  - 16 ALA Student Members/LIS Faculty

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

We are seeing some improvement in overall membership engagement and participation, especially with our Interest Groups and Sections.

Core groups held several successful online events during the months of January and February. Here are a few:

- Core Reading Club held a discussion in January on LLX speaker Cory Doctorow’s recent essay “What is Chokepoint Capitalism?: Why copyright alone can’t unrig creative labor markets” = 159 members of the reading club
- Library Leaders & Managers Interest Group hosted Library Leaders Lounge, February 23 = 172 registrants, 47 live attendees
- All About Core Forum Session, February 23 = 67 registrants, 44 live attendees
- e-Forum discussion on Tips and Best Practices to Guide in Training New and New to Their Role Personnel, February 7-8 = 1745 list subscribers, 88 discussion posts
- Volunteer Fair, January 12 = 233 registrants, 78 live attendees

**Describe the Most Impactful Unit Activities this Quarter:**

- The Best of Core Forum webinar series has been a great addition to the Core CE webinar lineup. Sessions held at Core Forum 2022 were voted by attendees as Best of Core Forum and selected to be presented as webinars
throughout the winter and spring months. Members are appreciative of the opportunity to access the content outside of the in-person Forum.

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

- Core Forum 2023 has received just over 100 proposals, and more are expected before the submission form closes on Friday, March 24.

- Based on our sandbox program, archive of 100+ on-demand recordings, and free webinar registration for Core students, we plan to reach out to library schools to discuss group memberships for their student bodies.

- This year’s Interest Group Week was our biggest yet, with 2,798 people registering 7,900 times for 24 sessions held over a 5-day period.

- The RDA Toolkit will be presented as a 4-Part Webinar Series in March. It is our biggest webinar series yet with 214 individuals and groups registered.

- Preservation Week will be held April 30 – May 6, 2023.

DEVELOPMENT

Unit Manager: Tracie Hall/Anne Manly

Unit Budget: $4,507,000

Budgeted revenue: $4,507,000  Budgeted expense: $458,349

Actual revenue: $5,515,000  Actual expense: $131,306

# of Staff: 3.25

Revenue Stream(s) the Unit Supports:

- Conference Services
- Continuing Education
- Contributed Revenue
- Membership
- Publishing

Status Report on Pivot Strategy, Aligned Unit Goals:
The Development Office is pleased to report that ALA has been granted $5,515,000 from the Mellon Foundation to support our mission, infrastructure, post-Covid relief, Data & Research, EDI, literacy, and Intellectual Freedom efforts. A news release was shared with AP and posted to ALA’s website. ABC news featured the report at https://abcnews.go.com/Entertainment/wireStory/american-library-association-gets-55-million-mellon-grant-96642637.

This is the second recent grant from the Mellon Foundation, joining the $2,550,000 Let Our Legacy Be Justice grant in 2021. In addition, ALA is the sub-grantee of a Mellon Foundation grant made to the San Francisco Public Library for the Expanding Information Access for Incarcerated People Initiative, for which ALA is updating the Standards for Library Services for the Incarcerated and Detained. For its role in the Prison Standards project, ALA will receive $583,767 for total Mellon Foundation support of $8,648,767 since 2021. Development extends its gratitude to ALA leadership, staff, and members for their outstanding work pursuant to these grants and for building a reputation of delivering services at the highest level.

The Development Office is also pleased to report that ALA received an end-of-year donation in the amount of $1,000,000 from Acton Family Giving. This donation will support ALA, libraries, and communities combatting attacks on intellectual freedom and the Bill of Rights. Acton Family Giving has been a steadfast supporter of ALA going back to its work with PPO more than 5 years ago.

In addition, Development welcomes the Danaher Foundation as a new funder. Danaher is supporting AASL’s work to increase participation in the STEM field by under-represented groups.

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

Overall giving from corporations, foundations, government, and individuals is strong. Current overall giving total is $11,854,834 through two quarters, compared to $15,908,977 for all of last year with all categories combined. Corporate and foundation support remain especially strong with both categories at their highest levels in Q1Q2 compared to the past four years. Corporate giving is at $1,456,889, compared to $1,374,234 in FY22Q1Q2. As indicated above, Foundation support is also strong, with the second highest Q1-Q2 level since 2019. Due to the cyclical nature of government grants, especially IMLS, government funding is at $478,200 this year in Q1 and Q2 compared to $2,358,907 last year. However, we are hopeful that recent applications will yield good results later in the year.

Individual giving remains a weak link within the overall giving plan. The Development Office will work with the Philanthropic Group’s Legacy Society and 1876 Club sub-committee to increase Legacy Society and 1876 Club membership; review contributions made through our association with FreeWill to determine how to best recognize those planned gifts within these reports; build on momentum from last year’s Giving Tuesday and end-of-year campaigns; and work to build Individual giving within Development Office capacity.

# of Members (for Divisions):

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

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

Pursuant to Executive Director Tracie Hall’s direction, members of the Development Office, along with CMO staff, are undertaking a review of the Giving Tuesday and end-of-year (Annual) campaigns.

Giving Tuesday. Our initial analysis indicates a slight but steady increase in Giving Tuesday totals from 2021 to 2022, with $33,008 having been raised in 2022 compared to $30,222 in 2021. The 21st Century Fund was the highest earner with $17,468, followed by “Other” at $9,920. “Other” is perennially the second highest category and was likely helped this year by donations in support of Intellectual Freedom. A concerning trend is the decrease of donations to the Spectrum Scholarship Fund which received $8,535 in 2021 and $2,330 in 2022.
Annual Fund Campaign. Our preliminary analysis indicates that the end-of-year campaign earned $13,910 in 2022, compared to $12,775 in 2021, $14,294 in 2020, and $19,910 in 2019. In 2017, with a boost from a matching campaign, ALA recorded its highest end-of-year earnings with $57,857. The number of gifts per year shows a slight decrease, while average amount of gift shows a slightly larger increase. A troubling data point indicates that the large majority of donors give only one year and do not repeat their donation in subsequent years. Donations to the 21st Century Fund and the Spectrum Scholarship Funds are the two highest categories of giving. There is also evidence that the audience that would give to a print mail campaign is weighing.

Describe the Most Impactful Unit Activities this Quarter:

1. Alford Group. In June 2022, ALA contracted with the Alford Group to conduct a feasibility study regarding ALA’s proposed multi-year fundraising campaign. Alford concluded its work in February. Alford’s Final Report was provided to the Executive Board and Executive Director Tracie Hall provided detailed information to the Board regarding Alford’s methodology and conclusions.
2. Giving Tuesday and End-of-Year campaign. See above.
3. PAG. The Development Office worked closely with the Philanthropic Advisory Group which has created several sub-committees to address specific areas including webpage development, nominating committee, Legacy Society and 1876 Club review and recommendations, and PAG event at Annual.
4. The Development Office submitted several proposals and funder reports in the last quarter.
5. The Development Office, with invaluable assistance from Terrence Miltner, sent “tax season” letters to ALA’s individual donors to express our appreciation for their contributions.

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

The Development Office is in the process of prospecting support for several new initiatives and hopes to report in more detail soon.

The Civic Imagination Station grant, funded by the Estee Lauder Foundation’s WRITING CHANGE initiative will conclude in the coming months. WRITING CHANGE is a three-year global, literacy initiative in partnership with Amanda Gorman, the youngest inaugural poet in U.S. history. The Civic Imagination Station’s pilot brought together a geographically and economically diverse cohort of twelve libraries and local artists to implement short-term arts-based initiatives that engaged local residents and built traditional and digital literacies. In addition to these pilot projects, the grant will produce a process map/toolkit that will be widely disseminated to support other library staff/artist partnerships to work together to create locally appropriate and meaningful collaborative projects of their own.

The Development Office anticipates dedicating significant capacity to the management of the recent Mellon grant which will provide support to ALA’s efforts in the areas of Intellectual Freedom, literacy, COVID relief, EDI, and infrastructure.

Under the leadership of Executive Director Tracie Hall and the advice of the Philanthropic Advisory Group and other stakeholders, Development expects to contribute to the next phases of the Fundraising campaign. In addition, we anticipate further progress towards the hiring of a Director of Advancement.

Donations and Grants, FY 2023 Q1-Q2 - September 1, 2022 - February 28, 2023

<table>
<thead>
<tr>
<th>Type</th>
<th>Number of Donors</th>
<th>Number of Gifts</th>
<th>Amount</th>
<th>Median</th>
<th>Average</th>
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<td>Individuals</td>
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<td>2,057</td>
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<td>$45</td>
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<td><strong>2306</strong></td>
<td><strong>$11,854,834</strong></td>
<td><strong>$50</strong></td>
<td><strong>$1,141</strong></td>
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*Includes gifts from Donor Advised Funds
Q1-Q2 Comparison of Giving from Corporations, Foundations, Organizations, Government, and Individuals

<table>
<thead>
<tr>
<th>Type</th>
<th>FY19 Q1-Q2</th>
<th>FY20 Q1-Q2</th>
<th>FY21 Q1-Q2</th>
<th>FY22 Q1-Q2</th>
<th>FY23 Q1-Q2</th>
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*Includes gifts from Donor Advised Funds

Q1-Q2 ALA and Unit Distribution

Overall Distribution: ALA and Units
Distribution for ALA: Programs, Endowments and Unrestricted

Distribution for Units: Programs, Endowments and Unrestricted

Giving from Corporations, Foundations, Government, Non-Profit, and Individuals By Category

<table>
<thead>
<tr>
<th>Type</th>
<th>ALA-Unrestricted</th>
<th>ALA-Program/Grants</th>
<th>ALA-Endowments</th>
<th>Units-Unrestricted</th>
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*Includes gifts from Donor Advised Funds
FINANCE AND ACCOUNTING

Unit Manager: Dina Tsourdinis

F.Y. 2023 Budget Amount (Overall Expense): $1,845,0149

# of Staff: 8 full-time staff and 2.5 temporary staff /consultant

Revenue Stream(s) the Unit Supports:

☒ Conference Services
☒ Continuing Education
☒ Contributed Revenue
☒ Membership
☒ Publishing

Status Report on Pivot Strategy, Aligned Unit Goals:

Streamline the accounting and month-end closing process:

After closing the financial reports as of December 2022, it was determined that it would be best practice for the accounting department to delay the January 2023 closing to allow time to complete the reconciliation of all Balance Sheet accounts. The release date of the performance reports to Unit Managers is March 17.

Streamlining accounting procedures requires system and ERP implementation of modules such as Bank Reconciliation, Journal Entry Workflow, Fixed Assets, and Accounts Payable approval workflow. We are working with our I.T. leadership to schedule and implement the above-listed system enhancements. In the meantime, we are working on creating training notes to document the accounting procedures. Ideally, a change in accounting procedure must occur at the beginning of the fiscal year.

Financial reporting:

One important aspect of accurate, current financial reports is the cutoff for accounts payable.

The continuation of timely financial reporting is a collaborative effort across all units of the Association. Effective with the fiscal year 2023, all Unit Managers must adhere to the published deadlines and cutoffs for invoices and inter-unit transfers. We will apply Generally Accepted Accounting Principles (GAAP) at year-end and for interim financial reporting. One important deadline is the invoice approval by all units, which is the 15th of each month for any previous month’s invoices.

Cross-training:

Certain accounting functions are performed by new staff to share knowledge and enrich their understanding of all processes of Accounting, as well as provide coverage of critical tasks. As the knowledge transfer occurs, documentation of the procedures is established. Due to inherent complexities with our accounting processes, the cross-training will be an ongoing effort in Finance and Accounting departments.

Important F&A updates:
Accounting:

With the retirement of the Controller position, we have been interviewing for an interim-to-permanent hire Controller.

Our Federal Indirect Cost rate is negotiated at 25.10%, and we are currently waiting for the official notification. This rate is submitted for update every two years.

We continue to use a new approach to monthly closings, prioritizing the revenue recording from the membership system (iMIS revenues) and non-iMIS Revenue. The prioritization of the revenue recognition function is beneficial. It has improved our timely update of members' and customers' accounts.

The Association's Accounts Payable volume is heavy, and this area is highly regulated. In collaboration with the I.T. department, we are working on implementing Concur for invoice processing and payments. We expect bank fee cost reduction to offset some of the costs of this platform, which integrates with our ERP. We also hope to realize efficiency, increase self-service options for information, and improve customer service and ease of information access by our Unit Managers.

The Finance ad Audit Committee approved the audited financial reports as of 8/31/22.

Finance:

F.Y. 2024 Budget

The first iteration of the F.Y. 2024 budget was completed, and areas of alignment were identified and reported by the Executive Director and CFO to Unit Managers.

The budget process continued to be inclusive and informative and was enhanced by various techniques such as:

- Providing a modern and improved cloud-based system to budget managers.
- We guided expenses by calculating the Revenue as a basis of available resources and as a constraining resource.
- Centralizing the F.Y. 2024 new hires and timeline with Human Resources.
- Aligned Accounting GAAP with Budgeting.
- Centralizing the data entry of grant-funded employee cost recovery and depreciation expenses with the Budget Office.
- Ongoing support and communication with Budget Managers.
- Ability to enter explanatory notes in the Budget software.

Other

- We applied for the property Tax Exemption for our Office Condominium in D.C. and are waiting for the scheduling of the site visit. This application revealed that the D.C. property tax jurisdiction, which denied the tax exemption of this property before, has strict rules for exemptions due to several national associations also having properties/offices in D.C. seeking exemptions. We hope to convince the jurisdiction of ALA’s value to libraries and library workers nationwide and seek an exception to the established rules by their code.

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

- The established operating structures of ALA with multiple portals, payment vendors/ payors sending payments without identification, and the ALA-issued manual invoices without a centralized system are significant obstacles in closing the financial records. In collaboration with I.T., we will be working on documenting, automating, and centralizing the financial activities in a way that will be more efficient and cost-saving.
• The retirement of the Controller has caused added work and knowledge transfer in a short period in addition to working with temporary staff, and the structure is under review.
• Systems integration and automation are necessary, including workflow approvals. Our systems need to be updated or replaced to avoid the multiple methods used for payment validation, authorization, and processing.
• Resources in a very complex association with multiple systems and processors of payments is still an issue causing overload for F&A staff.

• # Of Members/non-members/other stakeholders reached during the quarter (for all Units): Approximately 500.

Describe the Most Impactful Unit Activities this Quarter

• We have been focusing on contract review and re-negotiation of major expense lines such as Insurance, I.T., Printing, and Credit Card Processing, among others.
• The goal is to save using centralization and consolidation to realize economies of scale.
• Finance supported the February Endowment Trustee meeting in New York. One significant change made by the Endowment Trustees entails drawing down funds allocated by the endowment Trustees to fund operations and projects. Unlike previous procedures, the Accounting department will draw any Endowment Funds budgeted to be spent in a specific fiscal year no later than the first fiscal quarter of the same fiscal year.
• The Grants Accounting process is in conformance with current Generally Accepted Accounting Principles (GAAP). All fundraising units were trained, and we are excited about applying the new approach in F.Y. 2023.

With Prophix moved to the cloud version, we are revamping our Grants Reporting system within this platform to ensure checks and balances are in place. All Principal Investigators of Grants will have access to their grant reports to review, validate and access information for their grantor reporting.

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

• Continue the quality improvement efforts and best operating practices in Finance and Accounting.
• Mentor, coach, and guide the new team members to be successful and continue the learning and cross training efforts.
• Hire, mentor, and train the new Controller.
• Develop and deliver additional Accounts Payable training and new Prophix Budget and Financial reporting software cloud-based training.
• Continue regular meetings with Unit Managers and Division Executive Directors and monitor financial trends, projections, and negative variances in the budget.
• Continue working with Expense Reduction Analysts and Unit Managers to implement cost containment and vendor consolidation in all possible spending areas.
• Implement a new grant revenue recognition review monthly rather than quarterly.
• Implement Concur for invoice capture and processing.
• Support continuous I.T. efforts and streamline the systems and processes to realize savings through efficiencies.
• Continue to co-lead the work of the OAGW implementation task force.
GOVERNANCE OFFICE

Unit Manager: Sheryl Reyes

Unit Budget:

Governance (includes member leader budgets):

- Budgeted revenue and expense $0 / $361,472
- Actual revenue and expense $0 / $84,041

Executive Office

- Budgeted revenue and expense $20,000 / $1,056,747
- Actual revenue and expense $15,450 / $551,473

# of Staff: 4.5 Governance FTE

Revenue Stream(s) the Unit Supports:

☒ Conference Services
☒ Continuing Education
☒ Contributed Revenue
☒ Membership

Status Report on Pivot Strategy, Aligned Unit Goals:

Goal #1: Increase membership by restructuring ALA Affiliates program and relationships by strategically realigning fee to strengthen relationship and maximize value in FY22.

The Board will discuss the Affiliate program at their board meeting, April 2023. Please refer to CBD 21.0.

Goal #2: Increase the Member-Leader Pipeline by 5% in FY22 by improving member identification, cultivation, engagement, recruitment, appointment, and volunteer life cycle.

The ALA Governance Institute premiered at the Library Learning Experience (LLX) Event in January 2023. The Training, Orientation, Leadership and Development committee will be facilitating a “Strategic Leadership Meeting” at Annual Conference 2023. We are currently finalizing learning outcomes and determining the target audience for this session. The Governance cross functional team is working to develop goals, with the overarching themes around strengthening the member leadership pipeline and consistent governance practices and resources.

Goal #3: Evaluate and streamline programs managed by the Governance Office to increase membership and/or revenue generation in FY22.

Both the Award and Governance cross functional teams have been initiated and goal development is in progress. Every member of the Governance team is participating in a cross functional team (CFT) and/or as co-business owner in either the Awards or Governance CFT.

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

- The Governance Office has embraced and pivoted to an evolving portfolio of work since the pandemic:
- Hosting more frequent governance meetings. For example, Council meetings increased from twice a year in-person to meeting more frequently in various formats (2020 Council met 4 times; 2021 Council met 3 times; 2022 Council met 4 times);
- Anecdotally, governance observed and received feedback that volunteer engagement has decreased across the association; thus, work previously led and/or completed by volunteer members is increasingly handled by staff liaisons;
- Finalizing nominations for ballot positions for the 2023 elections;
- An increase of staff liaison assignments and duties to committees;
- Being assigned CFT co-business owners to Awards and Governance;
- Creating new leadership development offerings such as the ALA Governance Institute; and
- Beginning transition to a new election vendor

Governance staff will need to consider areas of work to sunset and/or streamline to increase bandwidth in order to accommodate new initiatives and projects within the Office. The demands of executing more frequent, hybrid meetings, as well as the additional support for committees and new programs, have increased. Managing expectations and focusing on the most impactful efforts will be critical in the upcoming year.

**Narrative Description Members/non-members/other stakeholder engagement. Describe the Most Impactful Unit Activities this Quarter.**

**Governance Meetings during the Library Learning Experience**

Members rated the hybrid Council meetings a 4.0 (out of a 5.0 scale). 19% attended digitally; 63% attended in person; 18% did not attend. 126-149 Councilors participated in voting at a given time.

**Volunteer Application and Appointments**

682 volunteer applications were received from 344 individuals. The initial proposed committee appointments were presented and approved by the Executive Board at LLX in January. 120 + initial committee appointments have been emailed to appointees.

**ALA Awards Applications**

Received 314 books for the two book awards and 71 applications for the 13 ALA Awards.

**ALA Governance Institute**

The inaugural ALA Governance Institute was successfully hosted on Friday, January 27, 2023 at the Library Learning Experience (LLX) event. With more than 200+ attendees, this new program provided insights into critical issues related to effective governance, with a focus on strategic communications and financial analysis and stewardship.

Intended for current and prospective ALA board, council, or committee members, as well as anyone interested in leadership within or beyond the association, attendees of the ALA Governance Institute (AGI) rated the overall program, 4.32 (out of a 5-point scale).

**ALA Executive Board Candidate Forum & Election**

President-elect Drabinski and the Committee on Committees developed a slate of Executive Board candidates and the Governance Office helped prepare for the Executive Board Candidate Forum and its election. The Executive Board Candidate Forum was moderated by President Pelayo-Lozada, held during LLX on Sunday, January 29, 2023. Election results were shared by the Head Teller on ALA Connect. 136 Councilors voted in the election. Efforts are underway to onboard the newly elected incoming board members, Sophia Sotilleo, Steven Yates, and Stephanie Chase.

**ALA Bylaws Revision Update**
On January 27, 2023, during LLX event in New Orleans, LA, ninety-eight percent (98%) of ALA Council voted in the affirmative to adopt the general revision of the American Library Association Bylaws as amended, for submission to the American Library Association membership, with the proviso that, after appropriate review upon adoption of the general revision by the ALA membership, all recommended policy insertions be made in the ALA Policy Manual. On April 12, 2023, the results of the rescission of the ALA Constitution and the ALA Bylaws revision will be announced.

Presidential Candidates Forum
The virtual Presidential Candidates Forum was scheduled on Wednesday, February 15, 2023. 246 registered for the event and 188 attended live. Attendees had the opportunity to become more informed about the candidates in preparation for the 2023 ALA Election. Immediately following the forum, ALA members had the opportunity to participate in virtual meet and greet sessions with each candidate.

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

- Throughout the Spring, will follow-up on committee appointees without responses, expired members, and other issues. Staff will also work with President-elect to identify alternate appointments in the instances of declinations.
- Working with our current election vendor to execute the spring 2023 web ballot, while transitioning to a new election vendor for the 2023 nominations & 2024 elections. The new nominations system will be built, tested, and launched by July 1, 2023.
- Working to host both incoming new board orientation (April 13) and spring board meeting (April 14-16) at the ALA Headquarters.
- The ALA Council voted to host the first ever hybrid Membership Meeting during ALA Annual Conference. ALA Governance will spend the next couple of months in collaboration with the Membership Office to prepare for this event.
- Working with the Training Orientation Leadership Development (TOLD) Committee to host a “Strategic Leadership Meeting” under the heading of the ALA Governance Institute (AGI). The current plan is to invite committee chairs, and Division/Round Table presiding chairs/presidents.
- Working with staff to prepare for the following governance meetings and programs during Annual Conference:
  - Opening General Session;
  - President’s Program;
  - Closing Session;
  - Inaugural Celebration;
  - Council Meetings;
  - Board Meetings;
  - Membership Meeting/Information Session;
  - Committee meetings; and
  - Social events
INFORMATION TECHNOLOGY

Unit Manager: Rebecca Headrick, Chief Information Technology Officer

For Period: Dec. 1, 2022 – Feb. 28, 2023

Unit Budget:

- Budgeted Expense YTD FY23 = $1,483,758
- Actual Expense YTD FY23 = $1,325,220

# of Staff: 8

Revenue Stream(s) the Unit Supports:

☒ Conference Services
☒ Continuing Education
☒ Contributed Revenue
☒ Membership
☒ Publishing

Status Report on Pivot Strategy, Aligned Unit Goals:

All IT unit goals below serve the Pivot Strategy as foundational to supporting and improving ALA operations. In addition, we are focused on significant organizational impact efforts like the website redesign and analytics platform efforts, as well as operational improvements to structure for efficiency organization-wide.

1. Drupal 9 ala.org Website Upgrade and Redesign
   The redesigned site will launch in December 2023

2. ALA Analytics - Continue to monitor revenue, membership goals, and pivot strategy
   Initial goals include presenting pivot strategy key performance indicators and other essential organizational management dashboards by the end of Q3 FY23.

3. Communications Inventory
   We have undertaken an inventory of email communication practices, platforms, and frequencies across all units to document the scope and volume of all ALA email communications to members and constituents. We will use this information to identify opportunities for better efficiencies and eliminate redundancies to support a streamlined and comprehensive communications strategy for all intended audiences.

4. Cloud Feasibility for Enterprise Applications
   Efforts are continuously underway to inventory all systems and interconnectivity of services to develop a plan and identify solution providers to support moving from on-premise to cloud solutions.

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

The ALA IT team continues to support existing infrastructure and applications, identifying opportunities for reducing complexity and support requirements and working closely with all ALA Divisions and Units to align resources for the most effective and efficient delivery of technology services.

First, ALA IT has moved to a model that supports Infrastructure and Enterprise Applications as two distinct operations within the unit. Sherri Vanyek, formerly IT Director, is now Director of Infrastructure, and Shakir Akbari, formerly IT Deputy Director, is now Director of Enterprise Applications. This new model will enable ALA IT to support existing
operations and strategic plans effectively. In addition, this structure will bring a fresh perspective to our technology strategy and application.

Sherri will oversee ALA infrastructure’s design, implementation, maintenance, and security, including hardware, software, network systems, and desktop support services—all essential to ensuring we have a strong foundation for our services and practice. In addition, Sherri will continue to lead the Website Update Project through its launch later this year.

Shakir will oversee ALA enterprise applications, including their identification, security, development, implementation, maintenance, and improvements, ensuring they align with our strategic goals to meet evolving needs.

Next, major projects for FY23 will have significant organization-wide impacts. The ALA Analytics platform will launch in Q3 FY23 to show internal and external business intelligence that informs data-driven decision-making. The Drupal 9 ALA website project update represents a significant opportunity to improve communication, enhance engagement, increase visibility, and provide greater accessibility for ALA’s most essential, public-facing resource. Multiple additional activities are underway in support of an overarching strategy to structure for efficiency across the organization.

**Describe the Most Impactful Unit Activities this Quarter:**

- The ALA Analytics project remains on target for the first release planned for Q3 FY23. We successfully connected to multiple data sources and gathered organizational key performance indicators (KPIs) to present in a dashboard format, encouraging the adoption of an analytics mindset and culture to drive decision-making.
- The ALA.org Content Audit was completed after a multi-month evaluation period. ALA staff audited over 37,000+ pages, identifying over 50% of those pages to archive. This is a significant accomplishment in our effort to streamline, consolidate and update content for better search results and accessibility when the new ALA.org launches in December 2023.
- We successfully updated the Great Plains financial platform and launched the cloud-based version of the Prophix Budget and Reporting system. These efforts helped ensure that ALA’s most essential financial management applications are adequately supported, secure, and at peak performance.
- We launched the effort to extend the new customer service support platform (launched for IT in December 2022) to other key ALA units. The new platform will enable us to centralize and elevate our ability to serve members and constituents with new features like web-based chat and more efficient support management by inquiry type and topic of interest. Platform analytics capabilities will help identify areas needing improvement for response time, development of FAQs, and more.
- We have defined the required scope of work to consolidate Microsoft Office365 services for ALA.org, ALAWash.org, and ALA-Choice.org domains under a single tenant. This project will bring several benefits, including simplified management, license cost consolidation, improved collaboration capabilities for all staff, enhanced security, and better insights and capabilities that support our ongoing efforts to improve the ALA knowledge management process and practice.

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

- As the execution phase of enabling the ALA Analytics platform continues, we will use defined KPIs to build initial dashboards for presentation in Q3 FY23.
- The ALA.org Website Redesign team is currently focused on the project’s User Experience Evaluation (UXE) phase. Wireframes were produced for feedback, and we are now identifying UXE feedback session participants and schedules. We remain on target to launch the new and improved ALA.org in December 2023.
• We will work closely with the Member Relations and Services team to define and launch their new online customer service context for consolidating and improving customer service capabilities and inter-departmental management of support inquiries.

• We will engage with managed service provider (MSP) partners and staff for ALA-Choice.org and ALAWash.org contexts to move through the required project to consolidate Office 365 into one tenant hosted by ALA.org resources. We plan to have all contexts in one tenant by August 2023.

• To continue improving Finance and Accounting (F&A) applications and processes, we worked closely with the F&A team to identify a suitable replacement for ALA’s current support-heavy A/P platform. After extensive evaluation, we chose to partner with ALA’s expense management vendor to adopt Concur Invoice. This robust, secure, cloud-based solution will fully integrate into existing ALA financial systems. Improvements will include reducing the time and effort required to manage invoices, eliminating manual errors, improving A/P process visibility for budget managers, and reducing processing costs. The launch is planned for the start of FY24.

INTERNATIONAL RELATIONS OFFICE

Unit Manager: Michael Dowling

Unit Budget: (through January 2023)

- Budgeted revenue and expense  
  revenue $56,000  expenses $110,369
- Actual revenue and expenses  
  revenue $0  expenses $112,387

Revenue from the Sharjah International Library Conference has been delayed. Revenue should appear in March report. The revenue from the Sharjah Conference ended up lower expected. The IRO revenue for the year is now forecast at $41,000. So expecting a $15,000 shortfall. Expenses are tracking to end on target, but working to end with lower expenses.

# of Staff: 1.5

Revenue Stream(s) the Unit Supports:

☒ Conference Services
☒ Continuing Education
☒ Contributed Revenue
☒ Membership

Status Report on Pivot Strategy, Aligned Unit Goals:

Conference Services

Promoted LLX, Annual Conference, and ACRL Conference to international members and rest of the international library community through various channels. Eighty-four librarians from nine countries participated in person or virtually in LLX and one hundred-fifteen just attended the ACRL from twenty-four countries. Worked with IRC and IRRT members on the development of programs for ALA Annual. Sent invitation letters to international members requesting to attend conference and secure visas.

Continuing Education

ALA is collaborating with American Corners in Kazakhstan to provide a series of webinars on Media Literacy that will run through May. The project is funded Bureau of Cultural and Educational Programs of the U.S. Department of State.
Modeled a previous Public Programs Office project ALA created the “Media Literacy in the Library: A Guide for Library Practitioners” contains information, program ideas and conversation starters on topics like misinformation and disinformation; architecture of the internet; civics; media landscape and economics; and media creation and engagement.

The first webinar for Kazakhstan which took place on December with 800 participants from different regions of Kazakhstan. The second webinar in January had over 550 participants. The presentations are simultaneously translated from English into Kazak and Russian.

IRRT with IRO provided one webinar this quarter. One hundred and seventy-eight registrants from around the world registered for the “‘Sister Libraries Chat” in February. Presenters and participants share their own experiences and connect with other librarians interested in creating Sister Library partnerships.

**Contributed Revenue**

ALA’s Ukraine Library Relief Fund raised $6,000 during the quarter making $25,000 raised and sent to the Ukraine Library Association (ULA) ULA distributed $15,000 during the quarter to nine libraries, and one librarian focused charity to assist library workers injured during the conflict. ULA will distribute the rest of the funds shortly. One hundred and twenty-six libraries have requested support.

**Membership**

IRO and IRC worked with other ALA units to recruit and bring forward ALA members to serve on IFLA committees for 2023-2027. The ALA Executive Board approved nominations for thirty-five members for IFLA leadership and on advisory and section committees. This included Past-President Julius C. Jefferson for Chair of Regional Division Council.

The Executive Board approved the recommendation of Past-Treasurer Maggie Farrell for a two-year term as ALA’s representative to the Board of the American Library in Paris.

This quarter started promotion of the new international member rate to past members and potential new members.

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

- New international membership recruitment

**# of Members/non-members/other stakeholders reached during quarter (for all Units):**

- 800 Kazakhstan librarians through Media Literacy webinars.
- 178 from webinar
- 4,000 through promotion of conferences.

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

- 

**Describe the Most Impactful Unit Activities this Quarter**

- IFLA nominations ensure ALA is actively involved at the global level.
- Introduction to why and how libraries should be involved in creating media literate communities in Kazakhstan
• Potential for new Sister Library relationships.

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

• Promote Annual Conference to ALA international members and non-members.

• Recruitment of new international members in collaboration with Membership.

• Creation of new regional global groups in ALA Connect for members from the various regions and those interested in libraries in those regions.

MEMBER RELATIONS & SERVICES

Unit Manager: Melissa Walling, MBA, CAE – Director

Unit Budget: for five months ending January, 2023

- Budgeted revenue and expense: $2,025,375/ $ (43,750)
- Actual revenue and expense $1,952,307/ $ (51,464)

# of Staff: 9.5

Revenue Stream(s) the Unit Supports:

☒ Conference Services
☐ Continuing Education
☐ Contributed Revenue
☒ Membership
☐ Publishing

Status Report on Pivot Strategy, Aligned Unit Goals:

The total ALA membership count at the end of February 2023 was 49,695, comparable to the count of 49,705 at the end of FY 2022 and 50,941 this time last year. This is a slight increase from December but remains flat to the start of the year. We hope that membership counts will continue to climb with the successful execution of the ACRL Conference and a successful ALA Annual Conference this June. We also recognize that since this is a one division conference fiscal year that ALA membership counts are historically lower than years with two division conferences.

Our membership strategy is focused on rebounding our membership counts and recruiting new members. We execute initiatives such as executing ongoing quarterly campaigns to recapture lapsed members by promoting ALA mission
impact and professional development opportunities, and automating a campaign to non-members who register for events on the Learning Management System.

ALA membership dues are trending 4% behind budget with a negative revenue budget variance of $73,000. While we are trending ahead of last year, we are below budget due to a slower membership rebound than initially hoped. With 2/3 of ALA members paying dues from their own pocket, ALA dues revenue is sensitive to economic conditions including sustained high inflation.

The membership office also supports revenue generation for the organization beyond ALA membership. This includes collecting division and round table dues revenue, support for subscription sales, registration for small face-to-face events and eLearning students. This all contributes to the pivot strategy.

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

Membership Recruitment: The membership recruitment effort is focusing on non-members who have already engaged with ALA on some level. A drip campaign targeting non-members who have enrolled in eLearning is underway and we will soon launch additional campaigns focusing on ALA Annual Conference and a small pilot campaign for discounted first-year membership.

The Unite Against Book Bans (UABB) campaign continues to draw lapsed members to reinstate their membership. This message has not proven successful in the recruitment of non-members, so we are testing other messages with this group.

Recruitment of student members, both lapsed and non-members is a top priority. Special messaging focusing on the benefits of student membership (specifically discounted conference pricing) has been deployed to reach former student members within driving distance of Chicago. Additional campaigns specific to the student population are being planned.

Student Engagement: A multi-year effort is underway with Membership and Chapter Relations to deepen engagement with LIS students. This effort includes online engagement through Connect as well as virtual events for networking and education. We also launched a new web page for Students highlighting their unique benefits/resources: https://www.ala.org/membership/student-member-center
We appreciate the ALA Executive Board’s investment in their time and of offering to connect with LIS programs in their networks or geographic vicinity.

The recent Avenue M study indicated that students want to develop their skills through ALA. We want to be the go-to source for training and career development for LIS students. Data shows that 458 Students attended ALA Annual Conference 2022 and 185 Students attended LibLearnX 2023. eLearning is a key engagement platform for Students because of its lower price point and nearly 1,000 students enroll in eLearning events over the last year.

**# of Members/non-members/other stakeholders reached during quarter (for all Units):** All 50,000 members, lapsed members, select non-member groups

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

**ALA Connect Platform:**

The ALA Connect Community ecosystem is currently comprised of 1720 communities of which 1043 are the communities that Committees utilize to do the work of the association.

The implementation of the new Code of Conduct continues to have positive implications on important ratios and key metrics (Email Open Rates, and the Average Replies/Threads Ratio) that we use to indicate the value of Connect to members. By January of 2022, replies to posts in the ALA member community had decreased by 82%. Average Replies/Threads Ratio in the ALA Members Community has rebounded resoundingly.

Some of the key takeaways from our observations over the last quarter are:

- In December in all communities the Average Replies/Thread Ratio was .92. Since December, the entire ALA Connect community has Average Replies/Thread Ratio was .75. This is a downward trend of -20% since May. The Average Replies/Threads in the ALA Members Community followed suit and was .81 Average Replies/Threads during this period. The responses in the ALA Members hit a peak of .92 for the Average Replies/Thread in February 2023.

![Image of Average Replies Per Thread](image)

- We have 51,823 Active Users in ALA Connect. From December to March, we had 1,358 first-time logins, and 2,395 users that have agreed to the Code of Conduct. We continue to use Passive Marketing and automations are being used to promote the benefits of membership to Non-members. We continue to explore avenues to increase the value of ALA Connect for our members such as increasing the exposure of ALA eLearning opportunities in ALA Connect.
Describe the Most Impactful Unit Activities this Quarter:

**ALA Connect Live: Our Brave Communities: Facing Censorship Head On:** President Lessa Kanani’opua Pelayo-Lozada convened the first ALA Connect Live program of her presidential year for a conversation on censorship issues in libraries, legislation and how ALA has helped fight back against book banning efforts. She welcomed panelists Martha Hickson, School Librarian at North Hunterdon-Voorhees Regional High School, Brian Raitz, director of the Parkersburg and Wood County Public Library, and Lisa Varga, Executive Director of the Virginia Library Association. The discussion was moderated by Intellectual Freedom Committee Chair Lesliediana Jones. [https://www.ala.org/membership/ala-connect-live-series](https://www.ala.org/membership/ala-connect-live-series) Save the date for the next event on April 25th focused on school librarians.

**LibLearnX 2023:** ALA premiered an integrated ALA space on the exhibit floor called ALA Connect. Encompassing work across the association including the ALA store, public programs, publishing, and intellectual freedom, we launched an integrated space for attendees to learn and engage with ALA products and services. ALA staff also hosted huddles on important topics to crowdsource ideas and will convene huddles at ALA Annual Conference.

**Avenue M Membership Model Work and Membership Survey:** ALA re-engaged Avenue M as a partner in conducting a membership landscape survey as well as updating the membership model analysis. The all-member survey was sent and closed with 6,921 responses, an 87% completion rate, 12% response rate and a margin of error of +/-1% at the 95% confidence level. The results of this survey were shared with key member groups and will inform ALA’s work and membership model. The complete executive summary can be found on the ala.org web site (EBD #12.7 2022-2023).

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

**Customer Service:** We are continually thinking about how to improve the level of customer service that we provide. This quarter concluded the busy season for membership and subscription renewals, so our focus was on external customer service and meeting expected response times to members and customers. In FY23, we have invested in a customer service technology to better track and measure the customer experience. This tool will assist in tracking and streamlining our email operations and ensure consistent responses on frequently asked questions. We plan to launch the tool this summer which will also position us to offer live chat.

**ALA Membership Model:** ALA will move into the next phase of the Avenue M engagement which includes additional work on the new membership model. This work will include a final phase of financial modeling and recommendations to help guide the complex decisions on the pricing and bundling opportunities with the membership model. These final recommendations will be built upon the findings of the complete survey noted above.

**ALA Annual Conference:** In addition to the usual ALA Lounge, the membership office is also coordinating a membership education program – ALA Membership 101. The goal of this program will be to introduce new members to engagement opportunities and resources. This could also serve as a refresher for current members. This will be a pilot program and will leverage the success some of our divisions have had with similar programs.

**OFFICE FOR ACCREDITATION**

**Unit Manager:** Karen O’Brien

**Unit Budget:**

- Budgeted revenue and expense YTD 23 Jan: Revenue $86,716 Expense $89,574
- Actual revenue and expense YTD 22 Feb: Revenue $81,503 Expense $130,447

**# of Staff:** 2
Revenue Stream(s) the Unit Supports:

☒ Continuing Education
☒ Contributed Revenue
☒ Membership

Status Report on Pivot Strategy, Aligned Unit Goals:

Ensure quality and accessibility of ALA-accredited degree programs

- 64 institutions with ALA-accredited programs
  2 programs in Precandidacy status: University of Central Missouri and Middle Tennessee State
  1 program in Candidacy status for Initial ALA-accredited status: University College London, UK (visit Spring 2024, decision in June 2024)

- Trended metrics on faculty/student ratios, diversity, etc., available publicly from homepage [Excel]
  Trended data by program, including student-to-faculty ratios, enrollment graduation and more [Excel format]
  (https://www.ala.org/educationcareers/sites/ala.org.educationcareers/files/content/Trended_stats_to_2021_1.xlsx)

- Revised Standards proposal provided to the Governance Office for Council adoption at ALA Annual Conference June 2023, recognizes the state of the expanding field, ALA core values, and the urgency to broaden equity, diversity, and inclusion in LIS education and libraries.

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

Staffing capacity to maintain support to volunteers and MLIS programs (including two Precandidate programs in the mix) under the current Standards, while preparing for implementation of new Standards and the resultant revisions needed to the Accreditation Process, Policies, and Procedures (AP3) manual.

# of Members/non-members/other stakeholders reached during quarter (for all Units):

~850 leaders

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

Standards revision process engaged an estimated 1,000 stakeholders.

Fall review visits engaged at least 300 stakeholders directly, including 35 ALA volunteers: 12 members of CoA (two who are public members), 20 review panelists, LIS program staff and their constituent students and employer advisors.

Describe the Most Impactful Unit Activities this Quarter

As above: Standards revision and comprehensive program reviews in process.
Select Future Activities and Events Through End of Next Fiscal Quarter:

- Standards revision plans for implementation with the development of a Self-Study template based on the revision in tandem with the update to the process manual based on the Standards revision
- Closing spring comprehensive reviews with accreditation status decisions at the 2023 ALA Annual Conf
- Working with Precandidate programs seeking Candidacy to achieve Initial accreditation

OFFICE FOR DIVERSITY, LITERACY, AND OUTREACH SERVICES

Unit Manager: Kevin D. Strowder

Unit Budget: ODLOS Administrative: 11-116-0000

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# of Staff: 2 Full-time Employees & 2 Temporary Employees

Revenue Stream(s) the Unit Supports:

☒ Conference Services – primarily through our work with ALA member groups, the NALCo, and Outreach Affiliates (ABOS and ARSL), as the lead liaison for project engagement and conference support

☒ Continuing Education – reflected in operating budget

☒ Contributed Revenue – reflected in operating and project budgets, primarily Spectrum Scholarship Funding

☒ Membership – our work with member groups and the profession at large supports both member recruitment and retention

☒ Publishing

Status Report on Pivot Strategy, Aligned Unit Goals:

- Support ALA’s goal of increasing racial and ethnic diversity in its membership and the broader field by overseeing the first wide-scale study of the impact of race on LIS workforce retention by end of FY22.

We remain connected to the Diversity Counts & Longitudinal Study by supporting as an advisor and extending resources to identified consultants. However, the project has been transferred to the ALA Executive Office. The extensive network and marketing ability will serve it better.

- Strengthen the value proposition of ALA as a leading provider of Continuing Education on equity, diversity, and inclusion in FY22.
Capacity within the office has created a significant delay in the evaluation and implementation of our Continuing education programs. Until more staff are brought on, these opportunities are not being extended to the field.

- Increase ALA membership in coordination with MRS, CRO and the National Associations of Librarians of Color by end of FY22.

It remains an area of growth for ODLOS to fully engage the NALCo community as we know the potential for collective impact. We hope to uncover more ways of producing mutually beneficial programming, grant opportunities, and member support.

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

   Preliminary Work Plan for Development of the Standards.docx - Google Docs


The ALA Committee on Diversity has agreed to oversee the updates for both sets of standards within the ODLOS office. Carla Davis-Castro (COD Chair) has identified a sub-committee Chair for this work from the member pool who is already in contact with ODLOS Director, Rachel Chance (lead on standards for Incarcerated), and the other members who will support in a liaison role. We are in the process of finalizing the roadmap to Annual 2023 where the Committee on Diversity will present the standards to Council for review and adoption. From there, we plan to move into production and dissemination later that summer.

It is understood that ODLOS does not report directly to Council and there is no plan for that since we are leaning on member leadership. However, as the standards for the Print Disabled progress, there may be updates requested by Council. ODLOS will work collaboratively with COD and the sub-committee chairs on messaging to share out. The office will remain the ALA unit to uphold the work, but we secured the COD to be the bridge to Council to follow procedure for this effort.

ODLOS and LSSPS (Library Services to Special Populations) are updating the standards with NLS under a contract to be implemented over the next 2 years. This has been approved for a budget to engage a Working Group, Advisory Council, and Project Director. We are also taking the proper steps to ensure this is approved via Ala Governance in the coming months. ALA’s new Program Manager, Accessibility Services is spearheading the initiative.

# of Members/non-members/other stakeholders reached during quarter (for all Units):

Members reached during quarter (committees, EDI Assembly, RTs, Interest Groups) = 5,228

Combined members and non-members reached during quarter = 7,685

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

Coretta Scott King Book Awards Round Table
The adjustment period for CSKBART brings about new challenges that call for a revision of systems created to support their group. ODLOS Staff are working with them to navigate the Bylaws process, member recruitment, budget strategy,
and Round Table morale. ODLOS Director, in partnership with AED Melissa Walling, have been able to streamline communication by identifying a new Staff Liaison and temporary support staff to help address member needs. This has shown to be a successful move in the right direction.

**Coretta Scott King Book Awards Round Table (CSKBART) | Round Tables (ala.org)**

**Key Literacy Initiatives**

The Committee on Literacy and Literacy Assembly hosted another session in their standing webinar series in March 2023. Community Initiatives and Digital Literacy efforts were the focus of this session and pulled successful turnout. We plan to upload the recording to be accessed as part of the larger ALA Continuing education platform. Also, in the next couple of months the committee will have finalized the RFP and strategy for inviting folks to join as a consultant for the long-term strategic literacy plan. Lastly, the chair of the committee has been working with key stakeholders and ALA ED to implement a Literacy Track at ALA Annual to engage members in new conversations on the evolution of literacy practices.

**Describe the Most Impactful Unit Activities this Quarter:**

The EDI Assembly has been the major accomplishment of the ODLOS Advisory Council. With the assistance of ODLOS Advisory Committee members serving as the “EDI Assembly Working Group,” engagement has been high. The feedback for the Assembly has been overwhelmingly positive from participants.

- October 27th, 2022 was an introductory meeting. After the co-chairs defined the goals of the assembly using the 3 C’s (an opportunity to connect with others to build networks, collaborate with others on EDI-related projects, or copy the EDI-related work that others are doing, members had the opportunity to reflect in breakout rooms about how they want to help ALA towards its strategic direction of EDI this year and how the EDI Assembly could help. Then, the ALA ODLOS Office provided an update on its activities, which a chance for members to ask questions and provide input. Finally, represented groups provided updates on their activities.

- January 23rd, 2023 was on the topic of accessibility. Again, represented groups provided updates, and members had the chance to discuss. Next, the ODLOS office’s new Program Manager of Accessibility Services, Hillary Pearson, introduced herself and her work, and members had the opportunity to ask her questions. Carrie Banks of the Accessibility Assembly and Adina Mulliken of the Association of College and Research Libraries (ACRL) Accessibility Interest Group also shared more about the work of their groups. Finally, members were able to discuss in breakout groups how they can work together to ensure that ALA becomes more accessible.

- A third meeting on March 14th, 2023 on the topic, The Intersection of Intellectual Freedom and Social Justice. This meeting is being planned in collaboration with the Intellectual Freedom Committee and the Intellectual Freedom Roundtable.

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

**Accessibility Services, Program Manager**

ODLOS onboarded the Program Manager, Accessibility Services in November 2022. This role now allows for dedicated attention to the Interest Groups and Accessibility programming. Hillary Pearson has stepped in to lead the NLS Blind and Print Disabled standards revision, support the Public Programs Office on the LTC Small and Rural Library efforts, collaborate with Access Living to produce an Accessibility Road Map for ALA, and leverage Conference Services staff to enhance program access across the association.
Spectrum Leadership Institute 2023

The 2023 Spectrum Leadership Institute will take place Thursday, June 22 – Saturday, June 24, 2023, during ALA Annual. ODLOS plans to welcome the 60 Scholars who cement the 25th Anniversary of the program. The Spectrum advisory Committee is working to identify panelists, keynote speakers, and Alumni to help engage attendees. Ala Leadership are gathering in the coming weeks to determine how best to celebrate this milestone and leverage this year to further attract community partners and donors.

OFFICE FOR HUMAN RESOURCE DEVELOPMENT & RECRUITMENT (HRDR)

Unit Manager: Lorelle Swader, AED

Unit Budget:

- Budgeted revenue ($ 55,000) and expense ($ 221,823)
- Actual revenue ($ 213) and expense ($92,357)

# of Part-Time Staff: 0 part-time. (3 (1.6 FTE) (shared staff with the ALA-APA and HR)

Revenue Stream(s) the Unit Supports:

☒ Conference Services – JobLIST Placement & Career Development Center
☒ Continuing Education – Emerging Leaders; HRDR Coursework (as an approved provider for APA-CPLA)
☒ Contributed Revenue – General Scholarship and named endowments (Hoy, Hornback, Leisner, Drewes, Clift, Gaver, Brody); Lois Ann Gregory Wood and Shirley Olofson.
☒ Membership – New Members Round Table (NMRT)

Status Report on Pivot Strategy, Aligned Unit Goals:

Unit Goal to increase Membership by 5%

- The New Members Round Table (NMRT) is currently running 7% below their projections for membership.

Increase Revenue by 10% over Expenses

- Revenue is below budget, but expenses are also below. (Most of the unit’s revenue comes after Annual Conference and at the end of the fiscal year.)

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

- Revenue for the JobLIST Placement Center is down due to not having a face-to-face conference for LLX. We did better at the Annual Conference in Washington, DC, however our overall revenue was down by 44%.

# of Members (for Divisions): NMRT (1301)

# of Members/non-members/other stakeholders reached during quarter (for all Units): Approximately 500 individuals.

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

We have continued to support activities of the various ALA committees (COE, TOLD, HRDR Advisory, COSWL and SSGC), NMRT and leadership development programs (Emerging Leaders and ALA Scholars). Most activities have focused on providing virtual programming.

Describe the Most Impactful Unit Activities this Quarter:
The ALA-Wide Scholarship Clearinghouse applications closed on March 1, 2023. Total number of completed applications - 503

- ALA Century - 12
- Brody (Public Librarian) - 226
- Gaver - 191
- General - 424
- SAGE - 118
- Support - 229

Here are the division, round table, and Spectrum numbers

- ALSC – 194
- Core – 103
- YALSA – 143
- FMRT - 42
- GODORT – 56
- Spectrum – 206

Emerging Leaders 2023 Cohort Details

- There were (46) people selected to participate in the 2023 class of Emerging Leaders.
  - 29 Sponsored
  - 17 Not Sponsored
  - 42 U.S. citizens
  - 4 Canadian citizens

- There are 10 projects being worked on by teams. Unit hosts include:
  - 3 Divisions
    - AASL, ACRL-DOLS, and United for Libraries (UFL has 2 projects)
  - 2 Affiliate Organizations
    - APALA & BCALA
  - 5 Round Tables
    - GODORT & SRRT (Joint project), IFRT, IRRT, & NMRT

- Poster Session to highlight the work of the EL teams will be held on Friday, June 23, 2023; 2:30 p.m. – 3:30 p.m., during the ALA Annual Conference in Chicago

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

- The Committee on Education (COE) has made final revisions to the Core Competencies for the generalist librarian, and it was approved by Council during LLX. The committee is planning a webinar on May 17, 2023, 12:00 – 1:00 p.m. This session will briefly discuss some of the key changes that were made in this update, and then move into a discussion about the ways that these newly revised competences can be used by different stakeholders -- employers, LIS faculty members, students, and emerging professionals.
- There will be a face-to-face JobLIST Placement Center in Chicago during Annual Conference.
OFFICE FOR INTELLECTUAL FREEDOM

Unit Manager: Deborah Caldwell-Stone

Name of Unit: Office for Intellectual Freedom

Unit Budget:
- Budgeted revenue and expense $59,000 / $354,539
- Actual revenue and expense through 11/30/2022: $14,032 / $77,321

# of Staff: 2.6 FTE for OIF/FTRF combined; plus, two contract staff and one part-time contract employee.

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

Status Report on Pivot Strategy, Aligned Unit Goals:

As a general fund unit, the Office for Intellectual Freedom (OIF) provides indirect support for increased dues revenues and contributed revenues from members and donors invested in advancing the core values of intellectual freedom and privacy in libraries. Our overall strategy is the implementation of initiatives that demonstrate the value of ALA membership and support ALA’s core values and overall mission in regard to intellectual freedom. These initiatives include cooperative projects with the Public Policy and Advocacy Office, Chapter Relations, and ALA divisions that support individual members, library workers, and trustees addressing censorship, state chapters’ advocacy opposing adverse legislation and book bans, professional development and continuing education, and anti-censorship advocacy via Unite Against Book Bans.

In addition to building revenue through solicitation of contributions in support of ALA’s intellectual freedom programs, we continue to work with ALA’s continuing education unit to expand continuing education offerings. OIF is also pursuing opportunities to generate revenue through the sale of books, products, and digital resources. We continue to work on improving member engagement and experience by continuing work to improve online tools, reporting mechanisms, and member engagement.

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

- The volume and number of book challenges reported by library workers and documented in the news media has not abated, nor has the number of requests for assistance from members declined. In 2022, librarians, educators, and members of the public reported 1271 demands to censor library materials that targeted 2571 unique titles. In that same time period, OIF staff responded to 503 requests for support and assistance. Since January 1, 225 challenge reports have been filed with OIF, with 143 individuals and groups requesting assistance in responding to book challenges and other controversies about policies, displays, and programming. For this reason, challenge support remains a focus for the office, undertaken with a firm commitment to core value of individual confidentiality that preserves trust in ALA-OIF’s challenge support and data collection activities. To
improve users’ experience and respond to the volume of challenge reports, OIF staff revised and redesigned the online reporting system and its forms, transitioning from legacy Drupal forms to an integrated Airtable database.

- Unite Against Book Bans, ALA’s national campaign and grassroots advocacy initiative to fight book bans and support libraries and librarians, continues to grow through national partnerships and support from individuals across the country. UABB now boasts 71 national partners and 76 state and local partners in addition to the 11,000 plus individuals who have signed on to oppose book censorship in their libraries and nationwide. A growing component of the UABB campaign is local community organizing, led by Betsy Gomez. Direct support has been provided to activists in League City, Texas, and activists in St. Tammany and Lafayette, Louisiana. In addition, Betsy has advised community activists in Florida, Arkansas, California, Indiana, New Hampshire, Pennsylvania, and Virginia. Betsy is developing a model for community organizing, with plans for a public resource and toolkit for local activists fighting book bans.

- As anticipated, the ongoing coordinated political campaign by right-wing, partisan, conservative political and religious groups to censor and restrict library resources has resulted in the filing of over 100 bills in state legislatures intended to censor books, research databases, and other library programs and services. Many of the bills propose criminal prosecution, “bounty” fines, or defunding libraries to compel censorship by librarians and library boards. OIF and PPA staff meet nearly daily with state chapters and affiliates to discuss these bills, advise on substantive legal issues, and support their legislative advocacy.

- OIF joined with ALA’s Continuing Education unit the Freedom to Read Foundation, and the American Association of School Librarians to offer online programs offering training, support, and information about defending and supporting intellectual freedom in libraries that included opportunities for discussion about present-day intellectual freedom challenges. These included a five-webinar series for the Massachusetts Library Association focusing on intellectual freedom fundamentals and strategies for addressing challenges and policy development for new library staff. A second series of webinars co-sponsored with ALA CE and the Freedom to Read Foundation, “Defending Intellectual Freedom: Facing Challenges and Fighting Back,” addressed timely topics such as access to reproductive health information, advocating for intellectual freedom in rural and tribal libraries, and how to address misinformation and disinformation about books for children and adolescents and defend challenges to those books. A special series of webinars offered at no charge to AASL members also provided legal information and IF fundamentals along with strategies to manage and address book challenges.

**Member Outreach and Engagement 12/01/22 – 3/15/23:**

From December 1, 2022, to March 15, 2023, OIF tracked 398 unique censorship incidents through online reports, emails, phone calls, and news reports. Support was requested and provided by OIF staff in 143 cases that included requests for support associated with policy or legal information, aside from assistance with specific challenges to materials, displays, or programs.

<table>
<thead>
<tr>
<th>Category</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Books &amp; Graphic Novels</td>
<td>333</td>
</tr>
<tr>
<td>Programs</td>
<td>8</td>
</tr>
<tr>
<td>Displays &amp; Exhibits</td>
<td>13</td>
</tr>
<tr>
<td>Other Challenged Resources</td>
<td>44</td>
</tr>
<tr>
<td>(student publications, reading lists, pamphlets, First Amendment Audits, online resources, artwork)</td>
<td></td>
</tr>
</tbody>
</table>
Notable Challenges and Advocacy:

- A high school in California removed *The Handmaid’s Tale* from the AP/IB curriculum without following policy, after complaints from a group of parents. One parent pushed back, defending her daughter’s right to read, and asserting the value of studying the issues and ideas at play in the text as part of her education. She used talking points from the Unite Against Book Bans toolkit and was successful in getting *The Handmaid’s Tale* restored to the curriculum. She has subsequently volunteered to support OIF.

- Community organizers who have consulted with Unite Against Book Bans and OIF staff have embarked on a project to use Freedom of Information Act requests to uncover records documenting the removal of large numbers of titles from Florida school libraries due to administrators’ response to political and legislative pressures to ban schoolbooks in Florida, including the 74 titles withdrawn from school libraries in the Martin County School District without being formally challenged.

- A conservative religious organization protested the availability of LGBTQIA+ books from the Crawford County Library (AR) during the December 19 meeting of the Crawford County Quorum Court (CCQC). The CCQC decided that all LGBTQIA+ materials must be placed in a segregated collection and that only adults would be permitted to check them out. The library board chair and another member resigned in response. CCQC appointed members of the religious group to the library board. The library director was ousted in February. The board is now in the process of revising their selection and reconsideration policies.

- In Campbell County, Wyoming, library board members hostile to retaining LGBTQIA+ books in the teen and youth collections have invited the conservative Christian legal advocacy group Liberty Counsel to advise the board on re-writing library policies concerning collection development and minors’ access to books they deem inappropriate for minors. Liberty Counsel has a long history of suing libraries to challenge their meeting room policies and has been designated an LGBTQIA+ hate group by the Southern Poverty Leadership Council.

Additional Advocacy, Education and Outreach, December 1 – March 2, 2023

**Director Deborah Caldwell-Stone - Presentations**
- Reproductive Health and Libraries: Navigating the New Information Landscape, 01/11/23.
- Legal Fundamentals of Intellectual Freedom (Massachusetts Library Association /OIF) 02/02/2023
- RAILS Collection Development Networking Group, Illinois, policy webinar, 02/03/2023
- Managing First Amendment Audits and Social Media from the Inside Out (Massachusetts Library Association / OIF), 02/09/2023

**Joyce McIntosh, Assistant Program Director, Freedom to Read Foundation - Presentations**
- De-Escalating Challenges - Illinois Consortium of Academic and Research Librarians, 01/24/2023
- Interfaith Communities United for Peace and Justice - Los Angeles, 02/03/2023
- Joint Conference of Librarians of Color IF/SJ Symposium 02/02/2023
- IF Challenges and Lessons from the Frontline (OIF/AASL) 03/02/2023

**Betsy Gomez, Interim Program Manager - Presentations**
- Intellectual Freedom and Banned Books – North Park University 02/01/2023.
- Managing First Amendment Audits and Social Media from the Inside Out (Massachusetts Library Association / OIF), 02/09/2023

Describe the Most Impactful Unit Activities this Quarter

The event “Book Bans, Libraries, and the Law: Standing Up to Library Censorship in Louisiana and Beyond,” held on Saturday, January 28, 2022 at LibLearnX in New Orleans, brought together LibLearnX attendees, Louisiana librarians, local community activists, and First Amendment legal experts to share their experiences, learn about the law, and strategize for future action. Panelists included Louisiana librarians, library advocate Lynette Mejer, attorney Theresa Chmara, and Katie Schwartzman, director of the Tulane Law School First Amendment Clinic. Co-sponsors were ALA’s Unite Against Book Bans, the Tulane Law First Amendment Clinic, and the Freedom to Read Foundation.

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

Release of Top Ten Most Frequently Challenged and Banned Book list for 2022 as part of the State of America’s Library Report during National Library Week; and announcement of the 2023 theme for Banned Books Week.

Monday, April 24, will be the first ever designated “Right to Read” Day which will mark the first anniversary of Unite Against Book Bans. Right to Read Day is a national call to action, urging everyone to protect the freedom to read. The action will leverage Unite Against Book Ban’s relationships with its national, state, and local partners to amplify the call to action. Through social media, email, and more, all will be asked to not just know about banned books, but to organize together and DO something about book bans.

PUBLIC LIBRARY ASSOCIATION (PLA)

Unit Manager: Mary Davis Fournier

Unit Budget:

- Budgeted revenue and expense: FY23 Budget: $797,748 revenue /$1,213,224 expense
- Actual revenue and expense: January 2023 $362,784 revenue/$451,458 expense

# of Staff: 12.5

Revenue Stream(s) the Unit Supports:

☑ Continuing Education
☑ Contributed Revenue
☑ Membership
☑ Publishing
☑ Data, Research & Design

Status Report on Pivot Strategy, Aligned Unit Goals:

In FY23 PLA has two goals aligned to the Pivot Strategy and set sub-goals and deliverables as we work towards them during the year.

Goal 1: Increase PLA Membership revenue by 2%
Goal 2: Increase PLA CE revenue by 2%

Membership

PLA membership counts as of January 2023 were 8,028. PLA has seen an average membership loss (pre-pandemic) of 941 in non-conference years. The membership loss since the beginning of the FY23 year is 302, which is comparable to
FY19’s loss of 364 members. The table below compares January membership counts since FY20. Even fiscal years represent PLA Conference years, where we typically see a rise in membership.

<table>
<thead>
<tr>
<th>Month</th>
<th>FY23</th>
<th>FY22</th>
<th>FY21</th>
<th>FY20</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td>8,028</td>
<td>8,431</td>
<td>8,489</td>
<td>9,843</td>
</tr>
<tr>
<td>Change</td>
<td>-403</td>
<td>-461</td>
<td>-1,815</td>
<td></td>
</tr>
<tr>
<td></td>
<td>(-4.9%)</td>
<td>(-5.6%)</td>
<td>(-20.3%)</td>
<td></td>
</tr>
</tbody>
</table>

Despite experiencing a typical loss in membership, dues are at a 15%+ variance as of the January financial reports. This is likely due to the conservative projections for FY23 planning, and the success of PLA 2022 Conference (1,548 new/renewed/reinstated members).

**Web CE**
PLA Web CE shows a very strong performance year-to-date, with higher than forecast registration bringing in $40,860 and exceeding the budgeted $25,000 by approximately 40%.

<table>
<thead>
<tr>
<th>Date</th>
<th>Webinar</th>
<th>Paid Registrants</th>
</tr>
</thead>
<tbody>
<tr>
<td>September 7, 2022</td>
<td>Advancing Access for Library Customers with Sensory Needs</td>
<td>214</td>
</tr>
<tr>
<td>October 26, 2022</td>
<td>It is a New Day So Be a Great New Boss</td>
<td>120</td>
</tr>
<tr>
<td>November 16, 2022</td>
<td>Community Powered Adult Learning</td>
<td>53</td>
</tr>
<tr>
<td>December 7, 2022</td>
<td>Using Data to Engage Underserved Communities</td>
<td>112</td>
</tr>
</tbody>
</table>

Describe the major issues, trends, opportunities, or concerns that your unit has or is responding to this fiscal year through January 2023:

PLA continues to focus on supporting the field as it moves toward recovery in the midst of a disruptive social and economic environment.

- As libraries continue to confront unprecedented attacks on the freedom to read, PLA participates in the cross-unit crisis response team, provides support to the Office for Intellectual Freedom, reaches out to individual public library leaders experiencing attacks, and shares resources and information with allies in the field.
- PLA is partnering with Google to provide training for approximately 1,000 librarians and library staff through the Super Searchers program, a curriculum developed to help build information literacy skills. Librarians will be encouraged to train their patrons across libraries in the U.S.
- The Public Library Association (PLA) opened the Call for Proposals for educational sessions to be presented at its next biennial conference, to be held April 3-5, 2024, in Columbus, Ohio. The PLA 2024 Conference will highlight innovative, inclusive, and collaborative work and ideas that address diverse and changing community needs through our nation’s public libraries.
- PLA’s Annual Conference subcommittee of the Continuing Education Advisory Group selected 21 programs and two ½ day preconferences for presentation at the 2023 ALA Annual Conference in June.
- PLA staff exhibited and connected with members at the rescheduled Joint Conference of Librarians of Color.

# of Members (for Divisions): 8,028

# of Members/non-members/other stakeholders reached during quarter (for all Units): PLA: via enews and other targeted emails, 17,362 average recipients with a 18% open rate (members and stakeholders) +1,200 + (free and paid webinar registrants) +380 (PL magazine subscribers)

Narrative Description Members/non-members/other stakeholder engagement:
• PLA members participated in a free, virtual forum on Tuesday, March 21, to get to know the candidates standing for president in the 2023 PLA election. The forum was facilitated by PLA President Dr. Maria McCauley and featured candidates Jessica Dorr, Director, Boise (Idaho) Public Library, and Michael Lambert, City Librarian, San Francisco (Calif.). The archive and responses from all PLA candidates for office are available in a new blog.

• PLA staff coordinated with colleagues in OIF, PPA, and United for Libraries to collect and highlight resources and stories related to intellectual freedom and book challenges in its March/April issue.

Describe the Most Impactful Unit Activities this Quarter:

• The Public Libraries FYI podcast featured an interview with PLA President and Director of Cambridge Public Libraries, Dr. Maria McCauley. She discussed her background and involvement with PLA and her thoughts on the increasing role of libraries in their communities. The discussion also delved into the challenges and opportunities for public libraries in this moment, the recent update of the PLA strategic plan and what Dr. McCauley is most excited about as both the PLA President and a public library director.

• In addition to preparing to for the 2023 ALA Annual Conference, PLA is happy to point to the following CE opportunities, available live and via ALA’s Web CE platform:
  • Getting Started with Services to Decarcerated Patrons: This March 30 webinar teaches how to research incarcerated populations in the library’s area, put together a values-based project team, host job fairs, and develop library card and community resource partnerships, such as free legal help for expungement. Participants will be walked through how to consider buy-in in their library, as well as how to approach services and craft a welcoming environment through an equity lens.
  • Capturing Library Contributions to Sustainable Development Goals with Project Outcome: In this free webinar on April 5, presenters share how libraries can link their Project Outcome program surveys to the United Nations’ Sustainable Development Goals. Attendees will learn about the SDGs and how their library can leverage Project Outcome to capture and share their library’s impact in their community and the impact of libraries worldwide.
  • Launching Affordable Connectivity Program Training Materials: With ongoing funding from AT&T, PLA will launch a new DigitalLearn self-paced module to guide users through accessing broadband through the Affordable Connectivity Program. A related set of training materials will be available for off-the-shelf, library-led trainings. Modules and materials will be available in both English and Spanish at digitallearn.org.
  • PLA has initiated work with ALA Finance and other divisions to streamline, information share and collaborate on contract review, especially regarding conference vendors.

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

Planning for the PLA 2024 National Conference in Columbus, OH

• Data analysis of the 2022 Public Library Services for Strong Communities Survey responses.
• PLA staff will focus on strategies and tactics for its 2022-26 strategic plan implementation through a series of virtual and in-person planning discussions, and implementation of processes to foster EDISJ
• Work to complete the FY24 budget.
• PLA executive director is an active member of the Operating Agreement Implementation Task Force, its working subgroup, as well as the counterpart Internal Staff Operations Working Group.
PUBLIC POLICY AND ADVOCACY

Unit Manager: Alan Inouye

Unit Budget:

- Budgeted revenue and expense: $1,057,883
- Actual revenue and expense: $1,081,731

# of Staff: 14.75 FTE

Revenue Stream(s) the Unit Supports:

☒ Conference Services
☒ Membership

Status Report on Pivot Strategy, Aligned Unit Goals:

- Increased coordination/collaboration with offices and divisions to promote advocacy
  - OIF and CMO – collaborate extensively on Unite Against Book Bans campaign, focusing on communications and state/local advocacy as well as the national campaign
  - CMO – collaborating on media relations for LibLearnX and onboarding for new media relations consultants
  - All ALA divisions – Submitted advocacy and initiative content for social media, blogs, and other digital comms to divisions, PPA staff spoke at staff meeting

- To advance policies and legislation that build capacity of libraries to provide equitable library services, especially to underrepresented groups, advocated directly and in coalition for:
  - #FundLibraries campaign: Mobilized grassroots for proposed library construction funding in 2023 appropriations bill, closed campaign
  - Library construction advocacy (obtained federal language supporting funding efforts to assess the condition of library facilities)
  - FCC’s ACP Outreach Grants
  - Submitted comments to the FCC on its proceeding on digital discrimination
  - Published video on digital inclusion with the Coalition for Networked Information, in partnership with ACRL
  - Submitted comments to support the eligibility of network security expenses in the FCC’s proceeding on the e-rate program
  - Held webinar on new federal funding for sustainable retrofitting of library facilities
  - Advocated for improved broadband maps to inform forthcoming NTIA broadband funding

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

- Library funding: lateness of White House budget release means shorter window to gather signatures for Dear Appropriator letters in support of LSTA and IAL
- Access to information (Unite Against Book Bans): Working with OIF, PPA staff are supporting state associations and local libraries around the country to provide guidance on strategy, media relations and advocate
mobilization in resisting attempts to ban books and censor library professionals as adverse developments continue to intensify.

- State legislation involving access to information: see separate report on collaboration with OIF and CMO on the uptick in banned books and supporting library staff facing threats

# of Members/non-members/other stakeholders reached during quarter (for all Units):

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

- ALA members and leaders, reached via email, ALA Connect and ALA Connect Live
- Scores of posts on PPA (@LibraryPolicy), ALA, ALA division (incl. AASL, ACRL, PLA, UFL) and coalition partner (Unite Against Book Bans) social media accounts and blogs
- IMLS staff hosted in DC office for briefing on 2023 goals
- House and Senate members and/or staff from offices on Capitol Hill
- Leadership and membership in ALA affiliates, including APALA, BCALA, REFORMA and ARSL, to identify and recruit new advocates in key congressional districts to participate in ALA’s March Fly-In
- Library associations of states involved in banned books and state e-books legislative campaigns
- Journalists covering intellectual freedom and access to information and digital equity
- ALA and division/affiliate members identified & recruited by PPA staff to speak with local and national media
- Members of ALA’s national policy coalitions
- Attendees at the following events, where PPA staff presented:
  - HeadStart Advocacy Days panel on advocacy communications (January 24)
  - LibLearnX sessions, including Building Thriving Communities: The Library’s Role in Economic Development, as well as member committee presentations
  - Libraries Taking Care of Business: Stories of Peer Support and Community Engagement, presented at Joint Council for Librarians of Color conference (February)

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

PPA managed through a higher level of uncertainty and anxiety in this reporting period. Externally, the political environment turned more challenging with the advent of the change in control of the U.S. House of Representatives, and thus a divided U.S. Congress and the launch of many legislative sessions in the states. Also, the introduction of the President’s budget for FY24 was delayed by over a month, greatly compressing the time for the appropriations campaign.

Internally, while excited about the prospect of an in-person congressional fly-in (the last in-person one was in February 2020), which would be the first-ever in collaboration with another organization (COSLA), it also contributed uncertainty to our work. An additional challenge derived from the departure of Megan Cusick, given her centrality to ALA’s advocacy to oppose book banning and censorship, and how to provide coverage for her responsibilities.

Subsequent developments in these areas proved to be successful or at least not as dire as feared. Much remains to be done, though our optimism level has increased. PPA will be re-focusing on activities of direct benefit to libraries and library workers even more, and looking harder for topics or activities that may be streamlined or eliminated.

Describe the Most Impactful Unit Activities this Quarter:

- Advancing the Unite Against Book Bans campaign
• Contributing on media coverage and security at LibLearnX
• Transitioning from FT staff to new consultants to cover state advocacy efforts

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

Launching our annual #FundLibraries campaign on FY2024 federal appropriations for libraries, with strategies that include:

- Hosting the #FundLibraries Congressional Fly-In, presented in partnership with COSLA (early March)
- Mobilizing advocates to generate signatures for Dear Appropriator letters when released in the House and Senate (March/April)

- Leading on communications with OIF and UABB partners for rollout of 2022 book challenge data
- National Library Week activities and events, including:
  - Freedom to Read Day (UABB)
  - Take Action for Libraries Day advocacy campaign
  - University of Maryland event with ALA President Lessa Pelayo-Lozada
  - Libraries Build Business Capitol Hill briefing on libraries and economic opportunity
- Gathering support for the Right to Read Act when it is reintroduced
- Continued state and local support to protect the right to access diverse, inclusive school library collections, and pushing back on at least two pieces of legislation introduced in this Congress that are likely to be re-introduced:
  - The Parents Bill of Rights, which includes a mandate that parents have access to a list of the books in the school library, and
  - The Stop Sexualization of Children Act, which would prohibit institutions that receive any federal funding from "sexually-oriented" programs, events, and literature for children under 10. The bill also would prohibit federal institutions from hosting or promoting literature and works which promote sexual orientation.
  - Ramping up new Policy Corps initiative led by Kent Oliver to combat book banning and censorship at the state and local levels.

**PUBLIC PROGRAMS OFFICE**

**Unit Manager:** Melanie Welch

**Unit Budget**

- FY23 Budgeted revenue and expense: General Fund Admin: $157,605; Grants: $6,775,346; Overhead: $725,971
- Actual revenue and expense to date: General Fund Admin: $15,548; Grants: $6,655,265; Overhead: $144,345

**# of Staff:** 9 positions (8 currently staffed plus a three-year term position to support the large LTC grant) and a temporary administrative assistant.

**Revenue Stream(s) the Unit Supports:**

☒ Contributed Revenue

**Status Report on Pivot Strategy, Aligned Unit Goals:**

PPO continues to exceed unit fundraising goals. Below are highlights of recent funding received and proposals currently under consideration by funders.
In December, PPO received a $60,000 grant from Poynter to collaborate with MediaWise and Stanford Social Media Lab on the creation and dissemination of a toolkit for library workers to use across the country to teach digital media literacy skills to adults. The toolkit may include resources such as a self-directed online course, instructional videos, examples of misinformation, guides for holding local workshops, and helpful resources to include in library newsletters and social channels.

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

- PPO continues to see intellectual freedom concerns impacting libraries across the country. Recently, we have encountered a decrease in grant applications on topics related to equity, diversity, and inclusion. Anecdotally, we are hearing that librarians are nervous about embarking on these projects for fear of attracting opposition from their communities.

- There is a major opportunity for libraries to continue their efforts addressing the digital divide by providing information to their communities about the Affordable Connectivity Program (ACP) offered by the Federal Communications Commission. To address this, PPO is working with EveryoneOn to incorporate resources and training into the planned Community Connect toolkit for rural libraries geared toward helping them connect patrons to the ACP information. PPO is also working with PLA to ensure the developed toolkit aligns with other ongoing work focused on ACP resources.

# of Members/non-members/other stakeholders reached during quarter (for all Units):

- Thinking Money for Kids: Two libraries hosted the exhibit and conducted related programming for children and families.

- ProgrammingLibrarian.org: 68,410 unique users visited the website to access content about library programming.

- Libraries Transforming Communities: Accessible Small and Rural Communities: 267 people have applied for the grant opportunity.

- The second and third sessions of the Libraries and Sustainability Virtual Book Club, a three-part series of virtual, interactive conversations about incorporating sustainability into librarianship were held, with 414 and 349 views.

- As part of our Libraries Transforming Communities initiative, PPO hosted “Difficult Conversations: Dealing with Hostility and De-escalating Conflict in the Library,” an accelerator session at LibLearnX, to a nearly full room. Approximately 100 people attended.

- PPO exhibited at LibLearnX to promote the availability of current grants and opportunities, reaching hundreds of attendees.

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

PPO’s Programming Librarian website provides resources to help libraries fill their role as centers of lifelong learning and cultural and civic life in their communities. More than 68,000 unique users visited ProgrammingLibrarian.org from December 1, 2022, to February 28, 2023, viewing more than 173,000 web pages. Popular web articles this quarter included “They Want to Shut Us Down: The Threats that Canceled a Drag Queen Bingo Program and How the Library
"Handled It," written by PPO Communications Specialist Hannah Arata about an incident at Downers Grove Public Library in Illinois. PPO’s popular Programming Librarian Facebook group had 27,503 members.

Describe the Most Impactful Unit Activities this Quarter:

PPO opened several new grant and project advisor opportunities for the field this quarter, including:

- **Libraries Transforming Communities: Accessible Small and Rural Communities** will award small and rural libraries $3.5 million in grants to help them improve their facilities, services, and programs for people with disabilities. The grant opportunity closed on February 28 with 267 applications submitted. Sites will be selected and announced in April. A second round of grants will be offered in Fall 2023.

- **Be MediaWise: The Misinformation Resilience Toolkit Project** issued an RFP seeking advisors to support creation of a toolkit focused on teaching adults how to identify misinformation. The RFP closed and 12 advisors were selected in February.

- **Community Connect: Fostering Digital Access** pilot will award up to 12 small and rural libraries programming stipends, wi-fi hotspots, laptops, and other resources to help support digital access and financial capability in rural communities. The grant opportunity will close on April 3.

- **Peggy Barber Tribute Grant**, an annual grant that recognizes, promotes, and supports meaningful programs in libraries that have limited and/or no access to budgetary support for programming. Selected sites receive a $2,500 grant to support their proposed project. PPO received 49 applications for three available awards. Winners will be announced in March.

- **Libraries Transforming Communities Engagement Grant**, an annual grant to recognize, promote, and support innovative and meaningful community engagement efforts in libraries. Selected sites receive a $2,000 grant to support their proposed project. PPO received 44 applications for two available awards. Winners will be announced in March.

- **Sara Jaffarian School Library Program Award for Exemplary Humanities Programming**, an annual award that recognizes excellence in humanities programming in libraries that serve children in grades K-8. This $5,000 award is presented annually by PPO, sponsored by ALA’s Cultural Communities Fund in cooperation with the American Association of School Librarians (AASL). Award nominations will close on May 5.

- Fifteen public libraries were selected to receive **World on the Move: 250,000 Years of Human Migration**, a traveling exhibition created by the American Anthropological Association and Smithsonian Center for Folklife and Cultural Heritage. Grantees will also receive a $500 programming stipend and site support materials. A virtual orientation training was held for the selected sites in February.

- The **Great Stories Club: Imagining Tomorrow: Building Inclusive Futures** development grant was completed, with a finalized suite of materials published on the project resource site. Materials include a scholar-created thematic essay, discussion questions and reading list, and librarian advisor-created supplemental programming guides.

- In January, the application for the **Great Stories Club: Reading and Discussion for At-Risk Youth** opened. Libraries of all types are welcome to apply for up to 100 grants on one of two themes, “Finding Your Voice” and “Deeper Than Our Skins.” Applications close in March. Selected grantees will receive a programming stipend, virtual project orientation training, sets of young adult books, and a suite of scholar-created materials for use with teenaged reading groups.

- PPO announced the extension of a successful and popular traveling exhibition, **Americans and the Holocaust**. The tour, based on a special exhibition at the U.S. Holocaust Memorial Museum in Washington, D.C., examines
the motives, pressures, and fears that shaped Americans’ responses to Nazism, war and genocide in Europe during the 1930s and 1940s. After traveling to 50 U.S. public and academic libraries from 2021 to 2023, the exhibition will now be available to 50 additional communities from 2024 to 2026. Libraries will be invited to apply starting in summer 2023 to be part of the extended tour.

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

- In March 2023, PPO will exhibit at the ACRL Conference in Pittsburgh to promote the office’s grant opportunities and resources.
- In April 2023, *Libraries Transforming Communities: Accessible Small and Rural Communities* will announce the libraries selected to receive a grant in Round 1. Sites will be onboarded in May. The project Practitioner’s Guide, focused on sharing best practices for serving people with disabilities, will be published on ALA’s website, and made freely available. The guide is being written in collaboration with Access Living, ALA’s Accessibility Assembly, and the Office for Diversity, Literacy, and Outreach Services.
- *Community Connect: Fostering Digital Access* will announce the libraries selected to receive a grant in May 2023. The project Practitioner’s Guide, focused on sharing ACP, digital literacy, and financial literacy resources, will be published on ALA’s website, and made freely available. The guide is being written in collaboration with Everyone On, the Public Library Association, and Capital One.
- In April 2023, applications will open for the *Great Stories Club: Imagining Tomorrow: Building Inclusive Futures* implementation grant. Libraries of all types are welcome to apply for 35 grants. Selected grantees will receive a programming stipend, virtual project orientation training, sets of young adult science fiction books, and a suite of scholar-created materials for use with teenaged reading groups.

**ALA PUBLISHING & MEDIA**

**Unit Manager:** Mary Mackay

**Unit Budget:**

- Budgeted FY23 Revenue $9,340,335/ Overhead $2,475,189/ Total Expenses $8,704,860/ Net $635,474
- Estimated revenue through 2/28/23: $4,194,534

**# of Staff:** 45

**Revenue Stream(s) the Unit Supports:**

☒ Publishing and Media

**Status Report on Pivot Strategy, Aligned Unit Goals:**

**Revenue:** At the end of February 2023, revenues for the department as a whole were estimated to be approximately 10.5% below budget, and although we are still projecting that some of that deficit will turn around in Q3 and Q4, we did not see the return of advertising hoped for in Q2. All units are monitoring closely and seeking creative strategies to close the gap.

**Published content and initiatives that support EDISJ engagement** and amplify “Let Our Legacy Be Justice” in Q2 included:
The second book in a proposed new ALA Neal-Schuman Critical Cultural Information Studies Series edited by Dr. Nicole A. Cooke was signed in Q2—the tentatively titled *Trauma Informed Practices: Transforming Libraries and Their Spaces*.

Articles in the Jan/Feb issue of *American Libraries* such as the annual Year In Review feature, which looked at topics such as threats aimed at libraries and library workers, book challenges, and access to reproductive health care information; a column about helping academic libraries implement strategies to improve recruitment, retention, and diversity; and articles about gender-affirming closets and the impact of book challenges on three public library directors in their communities.


**Extending markets:** Several initiatives are underway across the department to reach broader audiences both in the US and overseas, and to repackage and repurpose content (also the focus of related CFT work).

The January 2023 launch of *Booklist Reader* in print expands *Booklist*’s core audiences from library workers to library patrons and the public, and a content collaboration with PBS Books will lead to additional reach and exposure to new audiences, including the general public.

ALA Editions recently completed development work with external partner Sourcebooks on a new title for the trade market, *Teaching Banned Books: A Recommended Reading List with Lesson Guides for Parents and Kids to Explore Censored Literature* as part of their Ignite Reads series, set to be released in time for BBW 2023. Coordinating with the Publishing CFT, Editions is working to increase visibility of international sales pages, and will include information on translations. Various promo materials are in development to promote these opportunities, including at IFLA 2023.

ALA Graphics continues to add partners and products to the online Gift Shop line, allowing for fast turnaround without sunk costs in inventory, and in partnership with FRTF and OIF has added Free People Read Freely designs that have become rapid bestsellers.

RDA: Resource Description and Access continues to address global regional needs and to work with international translation partners, including Biblioteca Alexandrina and the National Library of Hungary on new Arabic and Hungarian translations respectively.

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

Revenues in Q2 remain approximately 10% below budget across the board (advertising, subscriptions, and product sales). The exception is ALA JobLIST (a joint project between *American Libraries* and ACRL, with HRDR); with an 18-month run of best or second-best performance against previous years; YTD sales for the first five months of FY23 were 27% greater than budget.

ALA Editions/Neal-Schuman saw some sales turnaround in Q2. Marketing increased its bank of marketing content and customer engagement platforms through author video interviews about RA, privacy, race in storytimes, and working with ALA Editions; innovative e-blasts such “What can I do to make my library better in 2023?” and “New Voices in EDISJ for Libraries”; the introduction of three new social media channels; and the leveraging of new and backlist titles for gift promotion. With these efforts, the unit expects to increase its reach, leading to strong revenue results in Q3 and Q4.
Economic headwinds have continued the pressure on advertising revenues through Q2, and some advertisers (also ALA conference exhibitors and sponsors) have continued to reduce their spend, especially publishers in light of reduced 2023 projections for the industry. As reported in a recent issue of Publisher’s Weekly, book publishers confront a difficult retail environment in which sales slowed in the final quarter of 2022 and rising costs associated with inflation and other economic factors are hurting profits. HarperCollins earnings fell by more than half in its second quarter, and profits fell at Hachette in 2022 despite a bump in sales. Earlier this year, Kristen McLean, the industry analyst for U.S. books at the NPD Group, predicted a challenging year for the book business as Covid-19–related changes in the business continue to shake out. A number of her predictions seem already to be coming true, especially one foreseeing that publishers would make some layoffs as they work to improve their returns on investment in the face of higher costs.

As of Q2, Booklist Reader in print (which launched in January 2023) has secured 64 paid subscriptions, yielding a circulation of 4,000 copies per month (the product delivers 50 or more copies to subscribing libraries). Thanks to generous Mellon Grant funding that will begin in June 2023, the print circulation will double as copies are distributed free to libraries in need. Increased circulation will help attract additional advertisers to Booklist Reader, which has already secured several.

We continue to monitor and mitigate increases in paper, ink, and postage costs where possible (lower print runs, paper type, fewer pages in magazines, fewer print catalogs, and working with printers on best practices). Paper costs seem to be improving, with paper stock more readily available.

RDA is seeing growing interest in Eastern Europe and is close to an agreement for a new Spanish language translation. The North American community has raised concerns about the changes to RDA and RDA Toolkit related to the 3R Project, delaying adoption of the new official RDA Toolkit.

The virtual Gift Shop allows Graphics to respond quickly to trends and opportunities such as adding Free People Read Freely designs soon after revising the designs to brand with ALA and FRTF logos.

### # of Members/non-members/other stakeholders reached during quarter (for all Units):

#### Booklist Q2 FY23
- Booklist Online avg. monthly pageviews 115,348 (-14,812 from Q1)
- Booklist: 7,317 avg. print subscribers (-118 from Q1)
- Booklist Reader: 64 subscribers, 3800 circ (New in Q2)
- 3,580 avg opens for BOL-hosted digital editions (-750 from Q1)
- 1,512 avg opens for Zinio/Overdrive-hosted digital editions (+19 from Q1)
- 86 institutional digital subscriptions (+6 from Q1)
- 258,819 enewsletter subscriptions (+12,633 from Q1; top list 106K)
- 5,565 active profiles, Booklist Online (+33 from Q1)
- 44,400 Twitter followers (+300 from Q1)
- 16,663 Facebook page follows; (+134 from Q1)
- YouTube channel subscribers: 554 (+37 from Q1)
- 2,096 LinkedIn followers (+799 from Q1)
- 639 Instagram followers (+357 from Q1)
- Q2 Podcasts: 4,606 listens for 3 podcasts (Shelf Care and Shelf Care Interview)
- Q2 webinars: 11,148 registrants for 12 webinars

#### ALA Editions/ALA Neal Schuman Q2 FY23
- 44,000 Spring/Summer 2023 catalogs mailed end of February
- 2,812 orders (+790 from Q1); 20,124 net units purchased (-29 from Q1)
ALA Graphics Q2 FY23
- No catalogs scheduled to be mailed (59,700 mailed in Q1)
- 1,018 orders (+58 from Q1); 6,297 net units purchased (+409 from Q1)

ALA Store Q2 FY23
- 142,048 sessions (-25,265 from Q1)
  - Note: Unique sessions stats not available in Google Analytics
- 295,789 unique pageviews (-106,710 from Q1)
- Users spend an average of 1:43 minutes per visit to the store (+ 8 sec from Q1)
- 51.3% of users find the store via organic search; 28.5% of users find the store via direct link (vs 34.5% in Q1)
- 20.37% of users find the store via referrals from other sites (42.84% from ala.org); 2.5% of users find the store via social media (vs 3.6% in Q1)

Digital Reference/RDA Q2 FY23
- 2,269 Toolkit subscribers (-206 from Q1)
- 8,913 users (-858 from Q1)
- 1,580 RDA-L email subscribers (+7 from Q1)
- 1,707 subscribers to RDA Toolkit YouTube Channel (+47 from Q1)

American Libraries and AL Direct Q2 FY23
- 47,514 recipients AL print (Jan/Feb) (+1,198 from Q1)
- 31,360 average recipients weekly AL Direct (-107 from Q1)
- 14,600 podcast listens (FY23 cumulative = 30,379)
- 95,317 Twitter followers (-423 from Q1); 20,722 Facebook page followers (-33 from Q1)

Narrative Description Members/non-members/other stakeholder engagement:
The magazines—Booklist and American Libraries—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 do not share customer data. Some orders are placed by accounting/ administrative departments of institutions that may be ordering for members but do not use member numbers to apply for discounts. Webinar attendance for sponsored webinars remains strong. One ongoing concern related to engagement is to ensure that we maximize the number of people buying each book or other product we publish, and that the right audiences are receiving pertinent information at the appropriate time to make purchasing decisions.

Describe the Most Impactful Unit Activities this Quarter:

ALA Editions/ALA Neal-Schuman Q2 FY23
- Published a total of 4 book projects. The cumulative total of books for FY23 is 32, plus 12-14 Facet titles.
- ALA Editions/Neal-Schuman and ALA Graphics joined forces at ALA LLX in January and then again at JCLC in February. At LLX, ALA Editions/Neal-Schuman sold gift titles in the Graphics Store and had a booth with display copies of the newest titles, swag, and raffles. At JCLC, at a combined booth, we displayed the latest EDISJ resources.
Booklist Q2 FY23

- *Booklist* staff attended LLX and showcased *Booklist* and *Booklist Reader* in print, in addition to editors participating in events with publishers.
- *Booklist* combined Editors’ Choice features (formerly featured in the January issue) with the Starred Reviews issue in December, so the December issue looked back on great works published in 2022. The January issue focused on Readers’ Advisory and this issue looks forward, focusing on trends (and books to come) in 2023.
- *Booklist Reader*, which launched digitally in 2021, launched in print in January 2023. So far, the print launch has been successful and, working with ALA Development, *Booklist* secured Mellon funds that will help to support additional print subscriptions to libraries in need.

American Libraries Q2 FY23

- Classified ad revenue for JobLIST, managed in collaboration with ACRL, ended Q2 with YTD sales for the first six months of FY23 was up 13.6% from FY22 YTD. The job market continues to be hot as Q2 sales were nearly 32% better than budget.
- The January/February issue of *American Libraries* previewed the first in-person LibLearnX conference and included the first dining guide since the Jan/Feb 2020 issue, focusing on New Orleans cultural cuisine. Other articles looked at the impact of challenges on several directors, libraries offering gender-affirming closets for youth, how states performed on library ballot measures, and our annual year in review. The issue also featured an interview with author Rebecca Makkai, the 2019 Carnegie Medal and Stonewall Book Award winner, about her new novel.
- Posted 28 online stories about the 2023 LibLearnX conference, including 22 posts covering conference programs and speakers. Conducted five green room interviews with speakers. Collaborated with CMO, ALSC, and MRS on conference content. Published three Daily Scoop e-newsletters from LibLearnX.
- Aired three episodes of the *Call Number with American Libraries* podcast, including a roundup of author chats from 2022 (December), an interview with several New Orleans library workers about their city and offerings (January), and a conversation about love and the genre of romance (February).

Digital Reference/RDA Q2 FY23

- A December release included updates to English and Finnish versions and all policy statements, as well as improvements to the user experience of the Toolkit.
- Digital Reference continued to support free monthly webinars, including a French-language guide to simple monograph cataloging with the revised RDA and a presentation on RDA education for the LIS environment.

ALA Graphics Q2 FY23

- ALA Graphics secured Kelly Yang as honorary chair of National Library Week 2023 on behalf of CMO.
- In-person meetings at LLX resulted in the development of new products in collaboration with Chronicle Books and Penguin Random House.
- ALA Graphics made several key connections at JCLC which have already resulted in new products. With input from the ALA Affiliate, Association of Jewish Libraries, in late April Graphics will debut a poster and bookmark celebrating Jewish American Heritage Month (May).

Select Future Activities and Events Through Q3, FY23:

*Booklist*: A new *Booklist* website will launch prior to Annual Conference in June. A new video product to be supported by publishers and launching in Q3, “*Booklist Presents,“ will offer short videos featuring authors. *Booklist Reader* will announce a major collaboration with PBS Books in Q3, in which PBS Books content will appear in every issue of *Booklist Reader*, beginning with the May 2023 issue. This collaboration will also lead to mutually beneficial additional reach and exposure to new audiences, including the general public.
ALA Editions/ALA Neal-Schuman: Books published in FY23, Q3 will include *The Readers’ Advisory Guide to Romance, Embracing Culturally Responsive Practice in School Libraries* (with AASL), *Hopeful Visions, Practical Actions: Cultural Humility in Library Work*, the final two books in AASL’s Shared Foundations series: *Engage* and *Curate*, the second edition of best-seller *Complete Copyright for K–12 Librarians and Educators*, and a 2023–2024 recommended reads planner from publishing partner, Sourcebooks, which includes content from *Booklist*.

ALA Graphics: The spring/summer catalog mails on April 24 including more than 24 new posters (one a still under-wraps celebrity READ poster that we are confident will attract strong sales and attention), bookmarks, and products. In coordination with OIF the new catalog launches the soon-to-be-announced 2023 theme for Banned Books Week and the 2023 Library Card Sign-up Month products.

**American Libraries:**
- The March/April issue of *American Libraries* includes a feature package on how the pandemic has reshaped libraries three years later (cover story), an interview with poet Clint Smith, and an excerpt from a *Call Number* episode about medical librarianship. The May issue returns with an annual feature on library systems, as well as an article about teens working with libraries to advocate for intellectual freedom and an interview with Angie Thomas, author of the 2018 Coretta Scott King Book Award–winning *The Hate U Give*. The March episode of *Call Number* includes conversations about COVID-19 innovations, including a segment with John Schaffer, the voice behind Curbside Larry, the character who went viral in 2020.
- In March, the *American Libraries* team will collaborate with CMO to post stories from the ACRL conference in Pittsburgh. A post about the #FundLibraries campaign will be spearheaded by PPAO.

Digital Reference/RDA:
- The Digital Reference (RDA) team will focus on continued orientation efforts to customers to prepare them for transition to the revised standard, continued engagement with new and current translation partners, and upgrading Drupal-based websites that support marketing and outreach to better address community needs. Planning for a joint meeting of the RDA Board and the RDSA Steering Committee in Chicago in May is already underway.

**REFERENCE AND USER SERVICES ASSOCIATION (RUSA)**

**Unit Manager:** Bill Ladewski

**Unit Budget:**

- Budgeted revenue and expense (FY23) $310,650/$289,557
- Budgeted revenue and expense (Through Jan ’23) $148,688/$134,364
- Actual revenue and expense (Through Jan ’23) $115,784/$93,959

**# of Staff:** 1.8 (One staff members is full time and one staff member divides time between RUSA and YALSA)

**Revenue Stream(s) the Unit Supports:**

- Continuing Education
- Membership

**Status Report on Pivot Strategy, Aligned Unit Goals:**
Goal 1 - Increase RUSA Membership by 1% per year by rebranding RUSA to increase the visibility of its work, targeted outreach to non-members, focused recruitment and retention measures, ongoing member engagement efforts, and student membership campaign in FY22.

Through January 2023, RUSA had 2497 members. This is a decrease of 60 members so far this membership year (since July 2022), or roughly a 2% decrease. We are currently working with several of our Sections on member communication to emphasize recruitment and retention. This consists of contacting new members as well as recently expired members. Through this communication we hope to gain a better understanding of member needs and what we can do to both keep and bring members back to RUSA.

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

RUSA’s CE revenue through January was $30,548. This figure was below budget expectations which were $46,667. RUSA’s CE calendar was light at the start of the fiscal year due to fewer program proposals being submitted than were anticipated. RUSA’s CE calendar has picked up though and as we move through the fiscal year, we expect CE revenue to catch up to budget expectations.

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

- **RUSA Virtual Forum**: RUSA will hold its second annual Virtual Forum on March 28 & 30. This year’s program has achieved similar registration and revenue targets as last year’s successful program. RUSA is encouraged that this new program has established both popularity and credibility within RUSA, as we hope to make it an annual program on our educational calendar going forward.

- **FY24 RUSA budget**: RUSA anticipates submitting a surplus budget for FY24. The first version of the budget was submitted in March and included our pivot strategy goals of 1% increase in member revenue and 2% increase in CE revenue. New revenue streams of sponsorship and fundraising are being considered by RUSA leadership and the RUSA office. Our goal is to set realistic targets for these new revenue streams and add them to our FY24 budget.

- **Website Audit**: RUSA unfortunately has struggled to keep up with the Division requirements of the current website audit work being led by ALA IT. At our current staff level, and no longer having a person leading our website support, performing the tasks necessary for the audit has been challenging and has required temporarily diverting staff resources away from our normal day-to-day tasks. We hope by the end of March this work will subside and RUSA staff can again focus primarily on work to advance our strategic goals.

# of Members (for Divisions): 2497 as of January 2023

# of Members/non-members/other stakeholders reached during quarter (for all Units): Through promotion this quarter of the RUSA Virtual Forum, with support from ALA production services, we have conservatively reached over 50,000 individuals.
Narrative Description Members/non-members/other stakeholder engagement:

- **RUSA membership**: We admit to being concerned of course with the decrease in membership for RUSA so far this membership year. We are very interested in the continued work on the new ALA membership model. We hope that strategies incorporated in this new model will help RUSA begin to achieve long term membership growth. Of RUSA’s total membership, only 494 members - or 19% - are exclusive to RUSA. The rest of the membership also belong to other Divisions and Round Tables. The options being discussed in the new membership model of lessening the financial burden of members joining multiple Divisions, a burden most RUSA members currently have, we think will ultimately help RUSA progress in its goals for membership growth.

- **RUSA Continuing Education**: Through the 2Q of FY23, RUSA CE has presented 3 courses and 4 webinars totaling 318 participants. Additional confirmed upcoming CE programing consist of 5 e-course and 5 webinars.

Describe the Most Impactful Unit Activities this Quarter:

- **Book & Media Awards**: The annual RUSA Book & Media awards ceremony occurred during LibLearnX on Sunday, January 29th. This non-ticketed event attracted approximately 100 in-person attendees, and hundreds more viewing the ceremony online. RUSA is home to many book and media awards and Best of Lists for adults. Now in the national spotlight with other prestigious literary awards, the Andrew Carnegie Medals for Excellence in Fiction and Nonfiction are announced at the RUSA’s Book and Media Awards ceremony. The year’s best in fiction, nonfiction, poetry, audiobook narration, reference materials and more, are hand-picked by selection committees that work closely with adult readers. Their efforts narrow down hundreds of finalists to curate the highly regarded “Best of” lists used by librarians, publishers, and booksellers nationwide.

- **RUSA Journal Relaunch**: Work has officially begun on the relaunch of the RUSA journal RUSQ. An announcement was recently made sharing a timeline for the next expected issue to be published, and a call for volunteers for the new RUSQ Editorial Board was also made. Confirmed as well was the appointment of a new RUSQ Editor, Barry Trott, who accepted a three-year term.

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

- **RUSA Achievement Awards**: RUSA will announce its 2023 Achievement Awards winners in March. RUSA’s Achievement Awards Program honors the best in reference librarianship and its many specialties. These awards recognize and honor the outstanding professional contributions and achievements of RUSA peers. This special recognition by RUSA enhances the sense of personal growth and accomplishment of our members, provides our membership with role models, and strengthens the image of our membership in the eyes of employers, leadership, and the librarianship community. RUSA currently supports 24 total Achievement Awards.

- **RUSA Virtual Forum**: As mentioned earlier, RUSA will hold its second annual RUSA Virtual Forum on March 28 & 30. The long-term goal of this new program for RUSA is to establish the Forum as a “can’t miss” program on RUSA’s educational calendar. With year-over-year growth so far, it is also the hope of RUSA that the program will begin to attract sponsors and bring new revenue streams in for RUSA. We are also contemplating making the Forum an in-person event in the future and moving away from the virtual element. Currently, consideration is being given to making the 2024 Forum an in-person event to be held in Chicago.
UNITED FOR LIBRARIES

Unit Manager: Beth Nawalinski

Unit Budget:

- Budgeted revenue and expense
  - FY23 Budgeted Revenue: $452,600
  - FY23 Budgeted Expense: $393,967
  - FY23 Budgeted Net Revenue/Expense: $58,633

# of Staff: 2.8 (0.8 unfilled)

Revenue Stream(s) the Unit Supports:

- Conference Services
- Continuing Education
- Contributed Revenue
- Membership

Status Report on Pivot Strategy, Aligned Unit Goals

Goal 1: Reconfigure "group members" to align with ALA membership structure; create clear delineation between membership and state library purchase of training and implement communication and marketing plan in FY22.

- United continues to see a steady incremental increase in personal membership with:
  - Conversion of group to personal membership
  - New ALA/United members.
  - ALA members adding United.
- The most popular benefits are BoardSource and Learning Live.
- United is tracking group to personal conversion and continues direct outreach to group contacts.
- Weekly office hours available and individuals can schedule personal one-on-one meetings with staff.

Goal 2: Host second annual virtual event with revenue goal of $10,000.

- Original goal completed in fourth quarter of FY21, with revenue increasing year over year for FY22 and FY23.


- High interest in statewide partnerships continues. United is working with several states on negotiations. Work in the second quarter focused on promotion, increasing registration and engagement, and improving statistics/reporting for partner states.
- Statewide All Access Partners: MA, MD, MI, MT, ND, NE, NH, OR, SC, SD, TX, VA, WI (new)
- Statewide Training (varies by state): AK, AL, IL, MS, MO (new), NJ

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

United member committees focused on the following during the second quarter:
• Board Orientation for new and incoming board members.
• Programming for the 2023 ALA Annual Conference.
• Planning for 2023 United for Libraries Virtual.
• Updating and creating new resources around book banning and intellectual freedom.
• Guiding and supporting two Emerging Leaders teams on behalf of our division.

Intellectual Freedom, program and material challenges, and the impact on library boards continues to be a United member, constituent, and board focus. Our member committee is active in providing direct support/mentoring upon request, developing programs, and updating/creating training and resources.

United for Libraries partnered with PLA on a feature article for the March/April 2023 issue of Public Libraries written by consultant Robyn Stein and Cara Tabeck who developed United’s new intellectual freedom toolkit. A follow-up webinar focused on board takeovers and other board-related issues and problems is scheduled for late May (date/time/title TBA). The webinar will be free for United personal members, PLA personal members, and United statewide all access partners. The six-page article, “Looking for Library Advocates In All the Right Places,” featured interviews, tips, and resources, including:

• ABCs of Public Library Collaboration: Anticipate What’s Ahead, Bridge to Deliver an Effective Response, Converse Techniques
• Four Key Messages
• Tips from Librarians & Library Advocates Across The Country

# of Members (for Divisions): 3,969 (as of January, 2023)

• Note on group members: as part of the group to personal conversion, we have started the transition of statewide group members to the statewide training model. The first state converted was South Dakota. State conversion combined with the sunset of group membership that started with 11/30/22 expirations, will result in the group numbers decreasing over the next 2-3 years.

# of Members/non-members/other stakeholders reached during quarter (for all Units): 20,000+

Narrative Description Members/non-members/other stakeholder engagement

2nd Quarter United for Libraries Learning Live (monthly members only webinars):

• December 13, 2022: Intellectual Freedom Update: Reflecting on 2022 and Recharging for 2023
• January 10, 2023: Privacy 101: How to Support Your Library
• February 14, 2023: Using the DEI Scorecard for Library and Information Organizations

2nd Quarter United for Libraries Paid Webinars

• January 21, 2023: Library Policies and Diversity, Equity, and Inclusion: What Trustees & Boards Need to Know

United for Libraries offers weekly office hours via Zoom on Thursdays from 12:00-1:00 pm Eastern during which time members, non-members, and those in partner states may ask questions, receive assistance, and provide feedback. United staff provides direct one-on-one assistance during this time and if needed schedules follow-up calls/meetings for individuals with more significant needs. This service has enabled us to provide both quick assistance with logins, access, and finding resources, as well as in-depth assistance for specific situations members are facing with their own boards.

Describe the Most Impactful Unit Activities this Quarter
United members and statewide users represent both library staff and volunteers (board members). We continue to test different days and times for both free and paid webinars to meet the needs of our stakeholders. In January, we held a paid webinar on a Saturday morning. Registration and participation averaged about the same as a weekday afternoon webinar, however, more Trustees were in attendance, whereas more library directors and staff attend typical weekday afternoon webinars. On-demand access continues to have significantly higher participation than live webinars, however, participant engagement in live webinars is both strong and lively.

United offers multiple entry points for statewide registration including direct individual registration, assistance by email and phone, and bulk registration by request of the library director. The latter is seeing increased engagement with library directors sending us a list of their board members. United staff creates the user accounts and enrolls the individuals. This process has improved registration, access, and engagement by Trustees.

United for Libraries staff and member guides met with our two Emerging Leaders teams during LLX in New Orleans in January. Member guides and staff are actively meeting with teams virtually and providing support, guidance, and connection to resources as the teams continue their work.

United staff developed a comprehensive eLearning plan and calendar for 2023. See the next section of this report for third quarter webinars and programs.

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

Third Quarter Learning Live:

- Tuesday, March 14, 2023: Social Media & Library Policies
- Tuesday, April 11, 2023, 2:00 pm Eastern: Board Support for Success
- Tuesday, May 9, 2023, 2:00 pm Eastern: Elected Officials are People Too: Advocacy Tips for Library Trustees, Friends, Foundations, and Staff

- Upcoming Free Webinars:
  - Hammer, Vise, Lever: Better Tools, Stronger Advocacy presented by United for Libraries, ALA Chapter Relations, and the ALA Committee on Library Advocacy on Wednesday, April 5, 2023, 2:00-3:15 pm Eastern.
    - NOTE: This webinar is offered FREE to anyone for live attendance and 30-days of on-demand access. After 30 days, the recording will be a Member Exclusive on the ALA eLearning website.
  - Bringing in the Money: How Friends and Foundations Can Find Funding & Grants, a two-part webinar series:
    - Applying for ALA Grants: Tips for Friends of the Library Groups and Foundations Presented with the ALA Public Program Office on Thursday, April 13, 2023, 2:00-3:00 p.m. Eastern.
    - Tell Your Library Friends or Foundation Story Using Your Candid (Gold Star) Profile Presented with the Regional Foundation Center of the Free Library of Philadelphia on Wednesday, April 19, 2023, 2:00-3:00 p.m. Eastern

- Upcoming Paid Webinars:
Building A Stronger Relationship with Your Library Board will be presented via webinar on Thursday, March 30, 2023, 2:00-3:15 pm Eastern.

- Free for those in MA, MD, MI, MT, ND, NE, NH, OR, SC, SD, TX, VA, WI

Strategic Planning: What Library Boards Need to Know will be presented via webinar on Wednesday, May 17, 2023, 2:00-3:15 pm Eastern.

- Free for those in MA, MD, MI, MS*, MT, ND, NE, NH, OR, SC, SD, TX, VA, WI
  - In MS, free for library director and Trustees of the 53 regional libraries.

YOUNG ADULT LIBRARY SERVICES ASSOCIATION (YALSA)

Unit Manager: LaMoya N Burks

Unit Budget:

- Budgeted revenue and expense $581,927 / $411,548 (Full year budget)
- Actual revenue and expense $220,110 / $264,627

# of Staff: 2 full time staff members, 1 subcontractor, 1 temporary

Split funded Staff Across Units = 2 staff members at 20%, 1 staff member at 12.75% (25% Publishing &Media)

Revenue Stream(s) the Unit Supports:

- Conference Services
- Continuing Education
- Contributed Revenue
- Membership
- Publishing

Status Report on Pivot Strategy, Aligned Unit Goals:

YALSA Strategic Plan: Strengthen engagement efforts with all those involved in teen library services by cultivating member connections and increasing membership. YALSA continues to work toward the goal of impacting the membership rate by 3% within each fiscal year.

YALSA Membership November 15, 2022 - 3184

YALSA Membership December 1, 2022 – 3130

YALSA Membership March 23, 2023 – 3264

1) February 8, 2023 - 2,207 YALSA members letting them know that we were sending them a link to be a member of MasterClass (a member benefit as a YALSA member)
March 2, 2023 – 77 emails were sent to YALSA expired members letting them know that if they rejoined YALSA by March 16, 2023 they would receive free MasterClass membership.

2) YALSA Member of the Month:

Since November, 2022 we have highlighted each month a “YALSA Member of the Month”. We highlight the member with …

- Their picture and Blurb on YALSA Website
- Their picture and Blurb in YALSA Newsletter
- “Member of the Month” lapel pin
- “Member of the Month” certificate

We average 3 to 5 calls daily from members with questions about membership, membership dues, expiration dates, committee interest and current engagement.

Conference Services - Symposium 2022 registration attendee goal was 471, 459 attended in Baltimore, Maryland.

Publishing – The Division has interviewed and contracted with stipend an Editor for the Young Adult Library Services Journal (YALS). The vacancy for the Journal of Research Young Library Adult Services (JRYLA) is slated to be filled by March 2023.

YALSA Strategic Plan – Implement advocacy initiatives to promote the importance of teen library services to key internal and external stakeholders. 2) Achieve financial stability and support growth by attracting and building alternative revenue sources. 3) Provide and promote programs and resources that speak to the diversity of our members and maximize membership value

Continuing Education – The “Under Scrutiny: Helping Staff Feel Safe and Empowered in the Face of Book Challenges” webinar with Darcy Lipp- Accord is scheduled for April 11, 2023 at 2pm CST. This YALSA (Young Adult Library Services Association) and Office of Intellectual Freedom webinar is co-sponsored by AASL (American Association of School Librarians), PLA (Public Library Association), and ALSC (Association for Library Service to Children). The event is free.

Additionally, YALSA and the Continuing Education team have planned through partnership

Paid eLearning Events
- eCourses: We will target 5-6 eCourses per year.
- Webinars: We will target 7-8 paid webinars per year
- ALA members will receive a 10% discount on all products, while YALSA members will receive a 20% discount.

Free Webinars
YALSA will target 4-5 free member exclusive webinars per year, and 1-2 webinars that are free to the general public. The member exclusive webinars will help to drive and incentivize registration with member-exclusive content, while the webinars offered to the general public will help to publicize membership and mission to a wider audience.
Describe the major issues, trends, opportunities, or concerns that your unit has or is responding to at the closing of this fiscal quarter:

YALSA presents an opportunity to increase revenue over expenses as outlined by the ALA Pivot Strategy and YALSA Strategic Plan. This includes increase in membership, grantors, sponsorship, and programming attendee participation.

Increase the number of members participating in YALSA programming by 5%.
Increase membership retention rate by 3%.
Increase new membership by 3%.
Increase the number of volunteers by 3%.

# of Members (for Divisions): 3264

Describe the Most Impactful Unit Activities this Quarter:

Symposium 2022 presented 90% of the attendee goal in Baltimore, Maryland.
The IMLS Train the Trainer cohort of 30 participated in a 3-day onsite training in Indianapolis, Indiana February 2023.

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

The IMLS Train the Trainer grant will end March 31, 2023. More than 4300 library professionals have been impacted through the grant worldwide. Toolkits, webinars, and website integration for YALSA.

The Regina Minudri Scholarship will be awarded to its first recipient for Spring 2023.