ALA Executive Director’s Report to ALA Executive Board
Prepared by Tracie D. Hall
September 30, 2022

ALA enters its first quarter of FY23 demonstrating a level of resilience and shared focus that portends well for its joint, long-term goals of membership growth and financial stabilization. The Pivot Strategy set in motion in FY21 continues to prove salient in its focus on revitalizing the association’s traditional impact streams of membership, conferences, and publishing; and expanding newer ones: continuing education, contributed revenue, and data, design, and research which will come into focus this fiscal year.

As MRS reports, **ALA membership counts have increased by 2.9%** to reach 51,173 after netting a 1% increase over FY21. Though this growth indicates that efforts to center member experience are well placed and timed, the gradual rate of member restoration reflects the impact of the pandemic and associated inflation on individual and institutional budgeting, as two-thirds of ALA members pay their own dues and the remaining third have their dues paid by their organizations. Understanding that member perception of value and tangible benefit is at the heart of their decision-making, ALA will be re-engaging Avenue M to conduct a membership survey and to support our work to update the membership model analysis. This refresh is important as ALA’s previous membership data is nearly five years old. Importantly, this analysis will include both current ALA members, recently lapsed members, and customers. The results of this survey will be shared in early 2023 and the corresponding plan for the membership model will be presented to Council next year.

As a standalone unit, **Continuing Education continues to gain ground.** In June, CE launched a new RDA eCourse which sold out within 3 weeks. In March, a new two-course bundle focused on equitable services for children and teens earned over $12,000 in revenue. Collaborations with other associations have also proved fruitful. In partnership with the Music Library Association, CE has launched the Music Cataloging Course bundle, which has generated over $20,000 in revenue to date. OIF launched its “First Amendment and Libraries,” e-Course in September featuring Theresa Chmara, General Counsel of Freedom to Read Foundation. This four-week credit-bearing course explores how the First Amendment governs the operation of publicly funded libraries.

**Contributed Revenue has set even more ambitious targets for FY23** after meeting its goal of over $3M for FY22 in unrestricted contributions through a combination of direct donation and administrative cost rates for project grants. With both the Development and Public Programs Offices looking to reach a wider constellation of donors, the hiring of the Director of Institutional Advancement and Partnerships is a priority with the search set to launch by the 2nd quarter. Also set for FY23, the hiring of a Director of the Center for the Future of Libraries will support the launch of the Data, Design, and Research unit – the sixth forecasted Pivot Strategy impact stream. A new Data Officer position will be housed in the CFTFL and report to the center’s director.

This fiscal year **Conference Services is set to host it’s first in-person Library Learning Experience (LibLearnX or LLX) convening in New Orleans this January 27-30, 2023** with the goal of attracting 2,000 attendees. This October, Conference Services will launch registration, marketing, and promotion for the LibLearnX: The Library Learning Experience. The official dates are January and will feature innovative and participatory education programs and highlights such as ALA Gives Back, Book & Media Awards (Virtual), I Love My Librarian Awards, LLX Marketplace: Exhibits and Ideas Xchange, LLX Studio, and the Youth Media Awards. The goal of this conference will be to respond to the
demand to widen offerings to respond to the needs of LIS practitioners and affiliated professionals. This vision will require an expanded approach to marketing.

An exciting new member offering that will premiere at LLX is the **ALA Governance Institute (AGI)** which has been created to provide current and prospective ALA Councilors and Executive Board Members (including Divisions) with the professional development they need to be impactful leaders and to make effective decisions. Inspired by the widespread observation that contemporary association leaders face increasingly complex leadership situations and high expectations for responsiveness to a wide range of constituents and stakeholders, participation in the AGI is free and open to the first 200 LLX registrants (though that number could prove mostly aspirational as this is a first time offering) and launches with three intensive workshops: **Strategic Communications for Executive Board Members** (which will be offered for members of the ALA Executive Board); **Effective Communication for Governance Meetings** (which will be offered to ALA Council and Committee leaders and interested LLX registrants); and **Financial Analysis and Review for ALA Member Leaders** which is required for ALA Executive Board Members and offered to ALA Council and Committee leaders and interested LLX registrants. The AGI will run from 8 am through Noon on January 27, 2023 and will give attendees a choice of one or two of these 90-minute sessions. Seasoned ALA leaders, staff, and other subject matter experts will serve as institute faculty. It is hoped that a successful launch and evaluation of the AGI will pave the way for the offering to become embedded within ALA’s growing professional development and leadership training offerings.

**ALA is also set to pilot its coordinated Community of Care approach at LLX next year**, as recently, the need to establish clear and visible care and safety measures at ALA Conferences has been made clear. Enhancing the sense of safety for all conference attendees is viewed as a tangible extension of ALA’s Code of Conduct and must be done in tandem with tangible measures to increase actual public safety and personal support for conference attendees. Drawing from informed practices emerging from social service and public safety measures, creating a Community of Care seeks to support the wellbeing of individuals and groups through community-level prevention solutions, such as fostering social connections and improving the built environment. They also call for interventions at the level of physical safety, mental health, and the facilities themselves. In that regard LLX will seek to have elements in place to address the following:

- Mental Health: Having a mental health professional onsite and available during all conference hours
- Social Connection: Enlisting a corps of ALA members and staff who will be stationed across the conference venue(s) and can easily be identified as CoC ambassadors and are trained to provide triage
- Built Environment: Continue to identify conference programming and contexts that require higher security. Emphasize safety and Code of Conduct in conference communications. Put new protocols in place for offsite programs hosted by vendors/exhibitors and other conference participants.

**Programmatic Priorities**

**Funding support for libraries continues to be a cross-association priority** as multiple units from PPA to Chapter Relations to the Public Programs and Development Offices and the Divisions work to expand legislation and direct grant opportunities to libraries. Last year, ALA was instrumental in shaping policy that resulted in the recognition of libraries as critical infrastructure. As well the association directly disseminated over $9M to libraries nationwide. This fiscal year, ALA hopes to continue to expand funding for libraries and to grow its ability to expand technical assistance in grant seeking to libraries as many do not have deep fundraising capacity or formal development teams.

As has been much discussed in recent years, **inclusive library services must address the persistent and growing rates of low literacy amongst adults**. In some communities, two out of five adults cannot read at a fifth grade level. Current research points to the waning number of programs that provide adult reading instruction and the decreased corps of adult literacy instructors. Though some libraries offer a range of literacy and basic education services, this is not yet a standard library service offering. Calls for library intervention and support are not new. In 1979, literacy rose to the fore of the concerns of the more than 3,600 participants convened for the first White House Conference on Library and Information Services. At that meeting, literacy was determined to be foundational to democracy and productivity, and
the low rate of literacy at that time was declared a crisis that libraries could not ignore. This year, ALA is joining forces with a consortium of peer organizations including the Barbara Bush Foundation for Adult Literacy, the National Coalition for Literacy, Pro-Literacy, and others on a joint initiative to increase access to literacy instruction across the country. Working with ODLOS, the Committee on Literacy, and the Center for the Future of Libraries, ALA’s focus will be on scaling a model for libraries as hubs for adult literacy instruction. Towards that end Executive Director Tracie Hall embarked on a study visit to Nashville, Houston, and Charlotte-Mecklenburg Public Libraries to observe their varying approaches to bolstering literacy outcomes in their regions. There are other libraries raising the visibility and advancing the reach of adult literacy instruction and outcomes. Though observation and anecdotal information speak to the impact library based literacy instruction has had on the long term outcomes of participants, none of these programs have been adequately documented nor meaningfully aggregated to determine the number of individuals these programs have served in comparison and contrast to those reached through other literacy instruction outlets. ALA, directly and in coordination with its ALL IN network peer institutions seeks to map and inventory library-based literacy instruction, and to extend the instruction capacity of libraries in regions where adult literacy outlets are scarce.

Recognizing how similarly critical the need for information access and adult basic education and literacy instruction is for those who are incarcerated, the advisory committee working on the Standards for Library Services for the Incarcerated and Detained continues its draft of the new edition which is set to be completed by spring/summer 2023. The hearings held to inform those standards drew nearly 200 individuals to an ALA Annual 2022 preconference where librarians, researchers, and newly released, formerly incarcerated individuals testified about how limited their access to physical books and the internet was in detention. ALA was widely commended for its curation of the convening.

Last fiscal year, through its Office for Intellectual Freedom, ALA became the first organization in the nation to launch an anti-censorship campaign. To date Unite Against Book Bans has attracted nearly 90 national and regional partners. UABB featured prominently in OIF’s constellation of offerings during Banned Books Week this September. This fall will see more efforts to promote ALA’s anti-censorship work and to promote the UABB toolkit to provide strategies for mobilizing those who want to protect the right to read.

**Divisions Updates**

ALA’s eight divisions continue to provide members with added membership value. As their respective, full reports indicate, division leaders and members are working hard to ensure that their offerings support the evolution of their specific service areas and meet the needs of their constituencies. Some highlights include ACRL’s new Companion Document to the ACRL Framework for Information Literacy for Higher Education: Science, Technology, Engineering, and Mathematics released in August. ALSC’s biennial in-person conference which was held in Kansas City, Missouri, from September 29 through October 1 and welcomed approximately 300 people to its first Institute post-pandemic. The Core Forum took place Oct 13-15 in Salt Lake City. More than 40 programs and preconferences were presented. PLA continues the dissemination of its 2021 Public Library and Staff Diversity Survey report and findings. The survey collected data about staff salaries and hours, roles within the library, staff representation, hiring and retention strategies, and equity, diversity, and inclusion goals and activities. The survey is the second in a rotating series of three national surveys exploring public library roles, services, and resources to provide actionable data for decision-making and advocacy. Key findings include:

- Virtually all (95%) public libraries report they engage in at least one type of EDI activity. More than a quarter (27%) of public libraries have formal EDI plans, and 25% report they have dedicated EDI staff roles.
- In 2021 the median annual salary of a public library director reported was $79,022, and the median annual salary of a beginning librarian was $41,864. When viewed with historic PLA salary data, beginning librarian salaries have been virtually flat, and library director salaries have not recovered to pre-Great Recession levels.
- More than a quarter (27%) of all public libraries report they lost staff positions in the prior 12 months. City (32.7%) and suburban (33.2%) libraries were slightly more likely to have lost staff positions than town/rural libraries (21.1%).
Also to note, the Public Library Association (PLA) Strategic Plan 2022—2026 is now available on the [PLA website](https://www.pla.org), following its unanimous approval by the PLA Board of Directors in June 2022. The PLA strategic plan centers Equity, Diversity, Inclusion, and Social Justice (EDISJ) and expands PLA’s role as a platform for innovation and amplifier for sharing public library community impacts. Having received over $1 million in contributions from AT&T, (PLA) has also selected 160 public libraries to host digital literacy workshops across the country. The PLA Digital Literacy Workshop Incentive, supported by AT&T, is designed to support public libraries in their efforts to boost digital skills for all members of their communities. More than 100 individuals attended [United for Libraries’ The ABC’s of Preserving Intellectual Freedom - Anticipating, Bridging and Conversing: How to Help Protect Your Library](https://www.ala.org/united/forraries/events/2022-08-09-2022-08-11). The pre-conference was made possible by the Jack Neal bequest to United for Libraries. A training and resources toolkit is in final production in partnership with our consultants Robyn L. Stein (President, Robyn L. Stein Group (RLSG)), and Cara Taback (Founder/President Cantata Communications). The toolkit, which will launch in late 2022, will be included in some statewide access packages, free for United for Libraries personal members, and will be available for standalone purchase. The 2022 United for Libraries Virtual was a success. United held its third annual virtual conference for Trustees, Friends, Foundations, and the staff that work with them. More than 1,000 individuals registered prior to the event held August 9-11, 2022. The [YALSA Symposium 2022](https://www.yalsa.org) is quickly approaching, and the division hopes to attract 471 total attendees. The symposium will be held in Baltimore, MD next month, November 4-6 2022.

**Staffing Updates**

Like many organizations, ALA is balancing the imperative to monitor its expenses with the desire to rebuild staff capacity to match current need. FY23 will see the hiring and onboarding of an estimated two dozen staff in new positions or ones that were previously frozen until the budget allowed. Two of our most recent staff additions include:

**Payal Patel** replaced Kerry Ward as **CMO interim Director in September 2022** Payal is a strategic communications professional, multilingual media spokesperson and crisis management expert with more than a decade of experience in leading public relations strategies and integrated marketing campaigns. Most recently, Payal spearheaded the communications department and served as the chief spokesperson for Navy Pier, one of the top destinations in the U.S., which welcomes nearly 9 million guests annually. Previously, Payal was the Public Relations Director for the NFL Players Association - Chicago, where she was instrumental in developing and executing comprehensive communications plans for the 2015 NFL Draft, the charitable arm’s high school grant and college scholarship programs, the concussions lawsuit against the NFL, and more. She also previously held communications positions at the Chicago Fire, Chicago Soul FC and Diversity Scholars, following a brief stint as a journalist in Milwaukee. In 2020, Payal was named to the PR NEWS Top Women in PR list and internationally recognized for her work in crisis management. In 2016, she was honored at the National Press Club in Washington D.C. as part of PR NEWS’ 30 Under 30 list, celebrating the industry’s rising stars. Payal is a fierce advocate for girls’ education and women’s economic empowerment.

Julie Reese has moved into the interim role as **Core Executive Director**.

We are also excited to have welcomed **Rebecca Headrick** as new **Chief Information Technology Officer** in September as well. Rebecca is an accomplished association executive with two decades of experience serving in strategic roles aligning technology with organizational strategy. Her most recent role as Chief Technology Director for the Illinois CPA Society (ICPAS) saw her spearhead the transformation of the Society’s technology strategy, including setting up a cloud-based infrastructure and guiding the optimization of multiple business processes, increasing staff and customer satisfaction, and member engagement. Before joining the team at ICPAS, Rebecca held multiple technology roles with the American Association of Nurse Anesthesiology (AANA). She served on the Aptify User Community Board and is currently Vice-Chair of the Association Forum Information Technology Special Interest Group.

Other positions that we hope to fill in or by the second quarter include a permanent **CMO Director**; **AED-PPA**; **Director of Institutional Advancement and Partnerships**; **Deputy Director of Conference Services**; **YALSA ED**; **Deputy Director, OIF**; **MRS Director**; and support positions for **AASL**, **ALSC**, **ACRL**, and **IT**. Though the Human Resources unit has worked
tirelessly to respond to the association’s staffing needs, that unit itself will require added staffing to reinforce its capacity, an issue we will address in FY24.

Additionally, we are pleased to announce that Alena Rivers, with the full support of the executive board of the Association for Library Service to Children, has been named ALSC Executive Director. Rivers began serving as interim executive director of ALSC in September of 2021. Since that time, she has worked closely with ALSC’s board of directors and members to ensure ALSC’s mission, programs, and services align with strategic goals. Rivers has worked to develop new relationships across ALA units and with external stakeholders and peer organizations holding mutual interests. This June Rivers oversaw the highly successful commemoration of the 100th anniversary of the Newbery Awards for excellence in children’s literature and one of the most attended Newbery-Caldecott-Legacy Award dinners in the program’s recent history.

Rivers joined ALA in 2017 as ALSC deputy director. In this role, she worked with ALSC staff, board, committees, and partners to support ALSC’s continued growth in member relations, communications, publications, continuing education, projects and grants, and convenings and symposia. Her work has included facilitating a division-wide collaboration on bystander intervention, implementation of the pilot ALSC Equity Fellowship and pilot ALSC Research Agenda Grant. She is a member of the Zena Sutherland Lecture Committee which annually selects thought leaders to present a professional lecture at the Chicago Public Library. Rivers came to ALA with over 15 years of experience in non-profit management, that included serving as the director of operations for the Illinois African American Coalition for Prevention, a membership-based, non-profit organization that strengthened prevention systems, policies, and programs in underserved communities. She also worked as associate director of enrollment management for IES Abroad, a non-profit study-abroad program provider, and as corporate communications and foundation assistant for the Montgomery Ward Foundation. Rivers received her Master of Library and Information Science with a certificate in youth services from Dominican University where she served as a graduate assistant in the Butler Children’s Literature Center.

Along with Rivers’ come two other promotions in ALSC: Laura Schulte Cooper has been promoted to Senior Program Officer, Communications and Anne Michaud has been promoted to Program Officer, Governance.
## REPORTS OF ALA UNITS

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AMERICAN ASSOCIATION OF SCHOOL LIBRARIANS (AASL)

Sylvia Knight Norton, AASL Executive Director

Unit Budget:

- Budgeted YTD April revenue $1,337,277 and expense $1,181,358
- Actual YTD April revenue $1,024,183 and expense $1,127,789
- Budgeted Overhead $261,893; Actual $189,687

# of Staff: 5 including Executive Director and a manager for professional development position that has been 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 pivot strategy goals focus on increasing membership and increasing revenue.

AASL is below membership projections with total dues revenue 20% below budget (actual $181,126 vs budget $225,473). The April 2022 membership report shows a 3.42% loss (5,558 in April 2021; 5,368 in April 2022). Several renewals did result after AASL contacted active members who did not realize their membership had lapsed in 2020. The number of student memberships increased by 52, the most since ALA discontinued in 2020 the agreement with AASL to add a complimentary ALA membership to the complimentary membership that AASL provided for LIS students who buy the National School Library Standards that is published in conjunction with ALA Editions. AASL has extended the offer to a complimentary division membership for any student who purchases the book and creates an ALA membership. MRS assisted by setting up a code

Revenue was significantly below budget in the April performance report. However, the report does not include a $58,000 transfer of funds from ALA Editions for publications that is agreed to be in the April budget. It also does not include a $94,000 difference that is expected to be adjusted for conference registrations. Even with this, the AASL National Conference will not meet FY22 budget projections that were impacted by the pandemic and a late summer surge of a variant, but on the whole the conference itself was a success for many of the attendees and serves as a highly visible way to show AASL’s value. AASL is now planning the next National Conference which will also feature new publications with ALA Editions.

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

The issues of the last year involving book challenges, proposed anti-education regulations, and verbal attacks and threats to school librarians continue for school librarians as they moved into another school year. Several members who had accepted appointments to committees regretfully resigned in late summer from the committees citing that the current environment in education has left them overwhelmed. Members are expressing their need for support and look for resources that will resonate with school librarians.
The AASL Practice Committee has identified a need for recruitment to the school librarian profession and is sending a report to the board to consider opportunities and action. There is still a great need to advocate for school librarian positions, yet some areas of the country have too many vacancies and not able to hire a certified school librarian.

**# of Members:** 5,368

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

AASL Digest (monthly) sent to 3900 averages 1800 clicks

AASL Friday Forecast (weekly) sent to approx. 3300 averages 1500 opens

Social Media - Twitter, Facebook, Instagram, LinkedIn, and Pinterest

- Impressions: 1,022,174
  (Number of times content was displayed to use)
- Engagements: 25,292
  (Number of times users engaged with posts)
- Post Link Clicks: 7,025
  (Number of times users clicked on links from posts)

AASL website 61,213 views

Knowledge Quest blog: 83,876 views

AASL Standards website 43,671 views

Recently established Communities of Practice held a meeting with 183 registrants

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

AASL holds monthly Town Halls, giving school librarians a forum to talk and share ideas and concerns. The August Town Hall looked at award winning collaboration. It had 155 participants and is archived for viewing.

With the reaffiliation of Arkansas and Delaware, there are 47 state and regional school library associations that are AASL Chapters. Each chapter sends delegates to the AASL Chapter Assembly. The AASL Chapter Assembly meets virtually throughout the year and in-person at ALA Annual. Affinity Groups are held for areas of interest to chapter organizations. In the 4th quarter AASL provided resources of materials for seven state AASL Chapter events or meetings. A rotating schedule sends an AASL President, President-elect, or Immediate Past President to state chapter conferences to connect with leadership. AASL leaders provide presentations or keynotes that are well received. Many of these organizations are not ALA Chapters so the AASL President is the only ALA leader they see. Last summer a presentation by Jennisen Lucas, AASL Immediate Past President, at the Connecticut Association of School Librarians prompted a school librarian to say she now knew what AASL was about so she would join.
Describe the Most Impactful Unit Activities this Quarter:

ALA Annual in DC provided an opportunity for AASL member leaders to meet in person. The AASL Board of Directors held two meetings, approving several policy revisions, and reaffirmed a commitment to Florida school librarians through the next National Conference to be held in Tampa. A new board was seated at a third meeting. The AASL Chapter Assembly also met and highlighted what was happening in their states. Commendation was approved for work in their state that advanced school library goals and profession.

Thanks to the generosity of AASL member Marney Welmers, AASL exhibited at the 2022 Pre-K-8 National Principals Conference in Louisville, Kentucky from July 14th – July 16th. AASL President, Kathy Lester, and AASL Executive Director, Sylvia Knight Norton, along with AASL members James Allen (Statewide School Library Lead/Digital Learning Coach at the Kentucky Department of Education) and Emily Northcutt (K-8 librarian at the Marnel C. Moorman School, Shelbyville, KY) had the opportunity to speak with principals and educators as they came through the exhibits. AASL showcased a new series of administrator videos in which administrators reflect on the ways that effective school libraries staffed by certified school librarians impact teaching and learning. The AASL Statement on School Library Scheduling described examples of the kinds of teaching and learning activities that responsive scheduling can provide in schools.

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

The Conference Committee meetings have begun and AASL staff are actively planning for the 2023 National Conference. In order to carry out the needed staff work and day-to-day operations, AASL has taken a comprehensive review all staff positions and revised to better align with ALA pivot strategies. These are specifically focused on goals for increased membership and increased revenue. For FY23 AASL has identified growth for three areas of direct revenue: 1) Members, 2) Learners, 3) Vendors. The effectiveness of this strategy is dependent upon being permitted to fill a Manager for Professional Learning position that has been vacant since January 2022 that would provide a comprehensive approach to continuing education across all formats and leverage content from the National Conference. The position would also oversee program content to offset the lack of a staff designated Meeting Manager.

Membership retention and recruitment will look to AASL Chapters, the school library associations in states that are often not part of the state ALA Chapter so association outreach, resources, and services to support members needs to be evident and show value for membership.

ASSOCIATION OF COLLEGE & RESEARCH LIBRARIES

Unit Manager: Robert Jay Malone

Unit Budget:

- Budgeted revenue and expense – FY22 Budget: Revenue $2,211,555 | Expenses $2,948,895 | Net ($737,340)
- Actual revenue and expense – Q2 Performance Reports: Revenue $872,188 (3% ahead of budget) | Expenses $966,148 (28% 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 in Q4 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. Staff continued using webcasts and other event registration/sign-up email lists in newsletter and marketing distribution this quarter, 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. 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 April 2022 official count, individual ACRL membership stands at 8,021, organizational membership stands at 508, and corporate membership stands at 19, for a total membership of 8,548.

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

The most recent “Top trends in academic libraries” report, authored by the 2021–22 ACRL Research Planning and Review Committee and published in the June 2022 issue of C&RL News, summarizes trending topics in academic librarianship from the past two years. One area on which the report focuses attention is ongoing inequities in profession that result in low morale among many library workers of color along with the disproportionate impact of the COVID-19 pandemic on underrepresented groups. To help address these underlying issues that impact all areas of library work, the Joint ALA/ARL Building Cultural Proficiencies for Racial Equity Framework Task Force’s final draft of the Cultural Proficiencies for Racial Equity: A Framework was approved by the boards of directors of the four partner organizations, the American Library Association (ALA), Association of College & Research Libraries (ACRL), Association of Research Libraries (ARL), and Public Library Association (PLA), during summer 2022.

The Framework is a tool both theoretical and practical in its orientation, as a guide for developing personal, organizational, institutional, and systems-level knowledge and understanding of the nature of racism and its many manifestations. The framework is not intended to be liberatory practice in itself—an instrument or agent that will abolish racial inequity or a step-by-step guide—but, rather, to provide the grounding needed to effect change in thinking, behavior, and practice that will lead to better outcomes for racialized and minoritized populations.

The report also cites areas such as open access that may be impacted through advocacy and legislative action. To help focus attention on these policy issues, the ACRL Government Relations Committee, in consultation with the ACRL Board of Directors and staff, formulates an annual ACRL Legislative Agenda. Drafted with input from key ACRL committees, ACRL leaders, and the ALA Public Policy and Advocacy Office, the ACRL Legislative Agenda is prioritized and focuses on issues at the national level affecting the welfare of academic and research libraries. The 2022 ACRL Legislative Agenda focuses on eight issues that the U.S. Congress has recently taken, or will most likely take, action on in the year ahead including federal funding for libraries, net neutrality, textbook affordability, public access to research, and more.

ACRL 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. Work is also ongoing on several
additional projects, including reevaluating the ACRL awards program through the dual lens of sustainability and equity and membership recruitment and retention initiatives.

**# of Members (for Divisions):** 8,548 (April 2022 official count)

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

- Paid online learning attendance: 152 individuals
- Newsletter total opens: 138,464
- Print and ebooks sold/distributed: 1,735
- Journal website total views (*C&RL*, *C&RL News*, *RBM*): 578,663
- ACRL website total visits: 151,424
- Facebook: 35,137 impressions; 1,631 engagements
- Instagram: 7,776 impressions; 426 engagements
- Twitter: 46,955 impressions; 1,449 engagements
- YouTube: 15,820 views; 1,921 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 two online courses during this report period. 152 individuals participated in e-learning focusing on instructional design, cognitive load, and active learning techniques. Upcoming topics include developing signature pedagogies, online library instruction, and critical information literacy instruction.
- Four new ACRL books were published during Q4 of FY22—bringing ACRL’s total published titles for the fiscal year to 20—and were promoted for purchase to members and other stakeholders. 1,125 print and individual-use ebooks were sold, along with 610 institutional ebook copies via distributors.
- The division sponsored 12 programs at the 2022 ALA Annual Conference in Washington, DC. The ACRL President’s Program, “Connect. Collaborate. Cooperate. Commit,” featured a panel discussion highlighting ways to become a leader within your institution through digital literacy programs that prepare students’ to be socially mobile, civically responsible, entrepreneurs, innovators, and productive members of the workforce. ACRL sponsored additional section, committee, and individual programs on topics such as engaging new generations of diverse library professionals, critical information literacy, open inclusive pedagogy, research data management, and more.
- The ACRL Rare Books and Manuscripts Section (RBMS) 2022 Virtual Conference, “Power. Resistance. Leadership,” was held June 21-24, 2022. Plenary sessions highlighted reflections on the past two pandemic years, reckoning with social change, and recovery through creative and artistic work. Conversations focused on continuing actions for racial, social, and environmental justice, along with examining opportunities to focus efforts toward effecting necessary change. More than 600 registrants and 30 bookseller companies participated in the conference.

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

**ACRL 2023 Conference Updates**

This July, ACRL announced its celebrated lineup of keynote speakers for the ACRL 2023 Conference, “Forging the Future,” to be held March 15-18, 2023, in Pittsburgh. Author and podcaster Rebecca Nagle will deliver the Opening Keynote on March 15, 2023. Nagle is an award-winning advocate, writer, and citizen of the Cherokee Nation. Her writing about Native representation and tribal sovereignty has been featured in *The Washington Post*, *The Guardian*, *USA Today*, *Teen Vogue*, The Huffington Post, and more. She is also the host of the chart-

Notifications for ACRL 2023 contributed paper, panel session, and workshop proposals were issued in late August. The deadline for lightning talk, poster session, roundtable discussion, and virtual conference presentation proposals, along with scholarship applications, is October 14, 2022. Conference registration opens in October 2022 and complete details are available on the conference website.

**Companion Document to the ACRL Framework for Information Literacy for Higher Education: Science, Technology, Engineering, and Mathematics**

The ACRL Board of Directors approved a new Companion Document to the ACRL Framework for Information Literacy for Higher Education: Science, Technology, Engineering, and Mathematics at its August 1, 2022, virtual meeting. Developed by the Science and Technology Section (STS) IL Framework Task Force, the Framework Companion Document can be readily used by STEM educators to conceptualize information literacy in the disciplines, and by librarians and others to understand how information literacy might look in STEM fields. These groups will be able to use the framework to tie information literacy into the context of their institution’s mission, to help guide their information literacy-related instruction, to be incorporated in curricula, syllabi, and assignments, and to assess student progress at the undergraduate, graduate, and professional levels.

**2023 ACRL Board of Directors Candidates**

ACRL announced the slate of candidates for the association’s Board of Directors for the 2023 ALA/ACRL elections in July 2022. Leo S. Lo of the University of New Mexico and Elisandro (Alex) Cabada of the University of Illinois at Urbana-Champaign will stand for Vice-President/President-Elect. Tarida Anantachai of the North Carolina State University Libraries and Kevin Butterfield of the University of Richmond will stand for one Director-at-Large position while Mary Beth Lock of Wake Forest University and Amy Dye-Reeves of Texas Tech University will stand for a second Director-at-Large position. A full list of candidates for ACRL and section offices will be available in the January 2023 issue of *C&RL News*.

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

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

**Unit Budget:**

- Budgeted revenue and expense: $1,094,231/$811,978
- Actual revenue and expense $1,650,811/$826,954

**# of Staff:** 4.5 and 1 shared position

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

- Conference Services
- Continuing Education
- Contributed Revenue
- 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.

• **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 on existing and successful continuing education programs, such as the Bill Morris Book Evaluation seminar and the new one-day virtual spring conference, into revenue generating streams that will attract new members and provide new opportunities for existing members. The CE strategy also included conducting an ALSC CE Needs Assessment, revisioning the CE website with an emphasis on articulating member benefits, integrating ALSC Core Competencies into CE/PD descriptions, leading to building a Competencies revenue stream, and curating CE programming for 1-2 new audiences to expand the ALSC brand.

• **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. Of note, ALA Editions and ALSC are partnered on a publication honoring the Newbery award. ALSC is also considering new areas to expand Dia 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, hiring, broadband access, and first amendment audits have been elevated to the forefront. ALSC thanks our Organizational Effectiveness committee for their insights on these areas.

• **Censorship and Book Challenges** - Numerous committees, including the Public Awareness and Advocacy Committee and Managing Children’s Services Committee, have shared information related to reconsideration and book challenges this past quarter. Public and school libraries across the country are continuing to see an uptick in book challenges and new laws are creating unease among librarians. In particular, Missouri recently passed a law threatening criminal prosecution for providing sexually explicit materials to children which may be used to censor books in libraries. 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 disproportionately target our BIPOC and LGBTQIA+ colleagues, authors / illustrators, and readers.
- **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. This may impact the number of BIPOC candidates for positions, as well.

- **Broadband Access** - The Covid-19 pandemic illuminated for many the stark disparities in broadband internet access around the country. Communities around the country, particularly rural communities, are beginning to see increased access to broadband at more reasonable costs which increased youth access to information. While this positive trend provides an opportunity for hope and celebration, there is still considerable work in this area which depends on ALSC and ALA advocacy.

- **First Amendment Audits** - First Amendment Audits have increased in frequency over the last several months resulting in increasing anxiety for library professionals. Recently, First Amendment Audits have been conducted by tweens, teens, and adults. This trend speaks to larger confidentiality and neutrality issues affecting all libraries and will continue to need to be monitored by ALSC and ALA.

**# of Members:** 3,603 (estimate as of April 2022)

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

3,603 Members

63,458 – Impressions on Twitter made

15.2k – Reach of our Facebook page

303 –Institute Registrants as of September 2022

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

Compared to April 2021, ALSC experienced a .22% increase in overall membership. Although small, this is the first year-over-year increase in membership since December FY19. This increase is expected as we slowly climb back to pre-pandemic numbers. Additionally, ALSC usually sees a slight increase in membership during even fiscal years due to our biannual Institute.

- Engaged approximately 60 members and non-members in ALSC’s virtual Notable Children’s Books discussions.
- Engaged approximately 20 members and non-members in ALSC’s virtual Notable Children’s Recordings discussions.
- Engaged approximately 20 members and non-members in the Welcoming Spaces virtual forum.
- Approximately 20 members and non-members participated in a new online course offering, Reading the Art in Picture Books.
- ALSC’s 2022 National Institute will take place in Kansas City, MO at the end of September and as of September 7, the event has brought in over 300 paid registrants.

In September, a bi-annual Membership Survey will be distributed to ALSC members to better understand their needs in time for the ALSC Board to evaluate and revise our three-year strategic plan.

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

- **ALSC Emerging Leaders Project** - Over a period of six months, ALSC emerging leader, Hyunjin Han and a group of other Emerging Leaders collaborated on ALSC’s project, Welcoming and Engaging Students in ALSC and
Children’s Services. This project focused on researching what current student engagement looks like in and outside of ALA. A final report and presentation to the ALSC board was made at the 2022 Annual Conference. The group made recommendations for how ALSC and ALA can be more intentional in engaging student members to transition them to Regular members. The ALSC Board will discuss and explore their recommendations at a future Board meeting and consider recommendations as part of ALSC’s membership pivot strategy goals.

- **Newbery 100 Celebration** – The Newbery 100 Celebration at Annual Conference served as the culminating event, following a year of activities honoring the Newbery at 100 years. The Celebration brought together 300 ALSC members, Newbery winners, and publishers to celebrate the award, where ALSC premiered the Newbery 100 Tribute Video created by Teachingbooks.net, followed by an in-person game of Author Librarian-fan Face-Off featuring Newbery Medal and Honor-winning authors and host of the popular YouTube original series of Author Fan Face-Off, Steve Sheinkin and Stacey Rattner.

- **IMLS Welcoming Spaces Forum** – The IMLS Welcoming Spaces grant was designed to develop and share a set of effective practices in serving immigrants and refugees in libraries and children’s museums. ALSC and the Association of Children’s Museums welcomed, as part of a virtual forum, participants representing children’s museums and libraries with experience in serving immigrants and refugees. Participants in this project recorded a brief video describing their project, program or service. The videos were compiled and shared during the forum to inspire discussion and idea sharing. Information from the forum will inform a resource on effective practices serving immigrants and refugees in libraries and children's museums.

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

- **ALSC National Institute** - ALSC’s biennial in-person conference will be held this year in Kansas City, Missouri, from Thursday, September 29 through Saturday, October 1. Highlights include all general session speakers - Christina Soontornvat, Dr. Nicole Cooke, Adam Gidwitz & Hena Khan, and BB Alston, Julian Randall, and Young Vo - as well as two evening receptions - one at Rabbit hOle and one at the Kansas City Public Library - Central Location in downtown KC. ALSC is excited to welcome more than 300 people to the first Institute post-pandemic!

- **Bill Morris Seminar at ALSC National Institute** - The biennial Bill Morris Seminar is now being held adjacent to ALSC National Institute. Due to the shift, ALSC hosted a Virtual Morris in FY22 and an in-person Morris in FY23. Participants will learn together about children’s media evaluation techniques. Participants will hear from experts in the field of children's media evaluation, as well as from those who have served on ALSC’s media evaluation committees, to develop their professional evaluation skills.

- **ALSC Membership Needs Assessment Survey** - In advance of building the 2022 – 2025 ALSC Strategic Plan, this fall, the ALSC Organizational Effectiveness Committee and staff will distribute a membership needs assessment survey to all ALSC members. The survey, usually distributed bi-annually, will help ALSC leaders better understand who ALSC members are and what their needs are in a post-pandemic era to better guide ALSC’s strategic priorities over the next three years.
Unit Manager: Michael Dowling

Unit Budget:

- Budgeted revenue $5,500 expense $135,067 - $129,567
- Actual (Jan) revenue $0 expense -$543,401 +$523,067
- Projection revenue -$2,000 expense -$473,000 +$475,000

# of Staff: 1.5

Revenue Stream(s) the Unit Supports:

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

Status Report on Pivot Strategy, Aligned Unit Goals:

Membership

Target was to increase joint-student membership by 3% by end of FY22 from start of FY22. Annual Conference should provide a slight increase in student members taking advantage of discounted pricing to join and save. Final numbers are not yet known but appears that will not meet increase goal.

Continuing Education

- Chapter Leaders Forum at Annual Conference allowed leaders from 20 Chapters to get together in-person for the first time in two years for a full day of networking.
- In August, organized trainings for first 20 Chapters that were migrating to new OneClick Platform. And for ALA staff in PPA and CRO.
- Organized first-ever orientation and discussion webinar for student chapter faculty liaisons.

Contributed Revenue

From June through August worked with 77 ALA COVID Library Relief Fund’ grantees to disseminate their $20,000 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 challenges and legislation across the country. Supporting OIF and PPA by working with Chapters to encourage public to sign on to Unite Against Book Bans.
- ALA and Chapters selected OneClickPolitics as the new advocacy platform. Needed to migrate data, set up new sites and train ALA and the Chapters (staff and volunteers) to be ready to use the new system for positive advocacy efforts and to respond to crises in early fall.

# of Members/non-members/other stakeholders reached during quarter (for all Units):
• 700 Chapter Leaders through ALA Connect, majority of them are ALA members.

• 77 libraries and communities that received ALA COVID Library Relief Fund grants

• 60 Student Chapter faculty liaisons.

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

• Provided Chapters information on ALA and units on opportunities and initiatives to reach beyond ALA members. Coordinated with 77 grant winning libraries to get necessary information to disseminate $20,000 grants. New effort to engage and connect ALA Student Chapter faculty liaisons.

Describe the Most Impactful Unit Activities this Quarter:

• “ALA COVID Library Relief Fund’ provided much needed financial assistance to 77 libraries struggling due to pandemic related budget cuts to help underserved populations most in need of their help and support.

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

• Webinars with Student Chapter Leaders to share best practices, connections to ALA.
• Attend Chapter Conferences in Midwest region with focus on promoting Annual 2023 in Chicago
• Promotion of joint-student memberships through faculty and student leaders at LIS programs.

CHOICE

Unit Manager: Rachel Hendrick – Interim Editor and Publisher

Unit Budget:

• Budgeted revenue and expense: $2,246,444/$2,456,389
• Actual revenue and expense: $1,437,147/$1,383,923 (April 2022 performance report)

# of Staff: 17 and 1 shared position

Revenue Stream(s) the Unit Supports:

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

Status Report on Pivot Strategy, Aligned Unit Goals:

Choice continues to build engagement in library adjacent channels. Our EDI themed blog, Towards Inclusive Excellence (TIE), and our webinar program both draw in audiences from all of academe. In August, our newsletter list for TIE grew
to 534 subscribers and we maintain a respectable 37% open rate and 12% click through rate. Our TIE newsletter readers are engaged and eager for EDI content. Recent articles on the TIE blog include a bibliography of resources about Leisure Studies (Leisure Studies Resources through a DEIA Lens: Summer 2022 Edition), a long-form book review on Derecka Purnell’s Becoming Abolitionists: Police, Protests, and the Pursuit of Freedom (Astra, 2021) by Dr. Kevin Anderson, a professor of political science at Eastern Illinois University.

Our webinar program also continues to provide content for librarians and their colleagues in the academic space. In FY22 we ran 37 programs and added 8,759 new viewers to our mail list. Our librarian viewers have been a great partner in bringing their colleagues both in and outside the library to our webinar program. For example, registration for our July program, How Academic Librarians are Working with Faculty to Source Affordable Textbooks for Students, sponsored by Taylor and Francis, included not only librarians but department heads, deans, and faculty.

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

As in past years, Choice continues to see decline in subscription revenue from our review database and print products. Choice magazine saw an 18% decline in subscriptions in FY22, while subscriptions for Reviews on Cards declined by 19% in the same time period. We are facing the reality of sunsetting these print products in the new few years and our senior management team is taking a close look at costs and advertising revenue. We will close these products when they are no longer profitable. Choice Reviews, our online reviews database, saw a decline in subscriptions of 11% over FY22. This was the same as FY21 and was accounted for in our budgeting. None of us can imagine Choice without book reviews so we are considering new kinds of review products and partnerships that do not rely on institutional subscription models.

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

- Subscriptions: 1,317
- Newsletters: 8,000 (unique subscribers)
- Podcast: 3,400
- Webinars: 5,600 (not unique)

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

As stated in the narratives above, Choice is actively growing our content engagement through our multimedia channels. We look forward to partnering with ACRL to drive subscriptions to ACRL Benchmark and maybe even membership to these lists.

Describe the Most Impactful Unit Activities this Quarter:

Leisure Studies is always a hot topic on Towards Inclusive Excellence (TIE) during the summer months. This year the team was ready and had plenty of content. The blog post Preserving the Indigenous and African American Heritage of Martha’s Vineyard garnered 139 views the first week. The team also created the podcast Applying Social Justice Principles to Leisure Studies which features a conversation with Dr. Rasul Mowatt of North Carolina State University. Finally, we posted a resource guide Leisure Studies Resources through a DEIA Lens: Summer 2022 Edition that features 45 books selected by Choice reviewers. This effort was not only to highlight a popular subject, but to test a larger strategy of producing multiple content types around a theme. This kind of research is important as we move to create new content verticals in the coming years.

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

Next year Choice is launching a new content vertical around the subject of Library Technology. We are in the process of convening our editorial advisors, deciding on a name, and creating a logo. We hope to launch July 17, 2023. This will attract new readers both in and outside the library and will give us access to new kinds of advertisers.
We are looking forward to working with ACRL to promote ACRL Benchmark and ACRL membership through Choice’s many multimedia channels. Initial comparisons of Choice mailing lists and ACRL membership lists show that there is plenty of opportunity for ACRL to recruit membership from Choice’s audience.

COMMUNICATIONS AND MARKETING OFFICE (CMO)

Unit Manager: Payal Patel, Interim Director as of Sept 26. Kerry Ward left ALA September 23 to head a small Ohio-based association.

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

# of Staff: Three full-time, two-part time.

Revenue Stream(s) the Unit Supports:

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

Status Report on Pivot Strategy, Aligned Unit Goals (based on data provided by former CMO Director Stephanie Hylwak):

Goal: Ensure Conference Services meets or exceeds goal for paid conference attendance

CMO continues to work with CS on ALA Annual Conference marketing and communications strategies.

Goal: Support new visibility campaign that positions both ALA and libraries as essential to increase awareness of ALA in the general public, attract new donors and supporters, and position ALA in a positive light for new and renewing members. This project is underwritten partially by Mellon funds.

The ALA Branding Work Group selected Mission Partners as the consultant to determine feasibility of a campaign. CMO continues to work with the Branding Group on this project. Campaign recommendations were presented to the Executive Board at the Annual Conference. The next iteration of the Working Group, with a new co-chair and a number of new members, met in September.

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

- CMO, working with IFO and PPA, responding to scores of media requests for comments on banned books this quarter. Deborah Caldwell-Stone continues to serve as the chief spokesperson for ALA on this issue, and due to her extraordinary knowledge and excellent interview skills, she is in much demand.
CMO partnered with Conference Services to promote the Annual Conference, particularly in the DMV area.

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

**ILoveLibraries.org**

During the period from June 1, 2022, to August 31, 2022, ilovelibraries.org (ALA’s public facing website) netted 75,144 total page views.

Highlights: During this period, I Love Libraries partnered with ALA Graphics and A24 film studio to promote the film *Marcel the Shell with Shoes On*, running an interview with the director and star and a sneak-preview ticket giveaway.

These were our top 10 most viewed articles:

- **Found in a Library Book (July 11, 2022)**
- **Five Reasons Everyone Should Have a Library Card (September 1, 2020)**
- **See Marcel the Shell with Shoes on ... Free! (June 19, 2022)**
- **The Mind Behind Maus Speaks Out (June 9, 2022)**
- **Book Challenges and Bans in the News (July 14, 2022)**
- **U.S. Book Challenges Update (August 26, 2022)**
- **A Registry of Historic Tunes (May 17, 2022)**
- **Take Virtual Tours of These Stunning Libraries (March 18, 2020)**

**Social Media**

**ALA and I Love Libraries Social Media Metrics**

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**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 in their community. Nominations opened for the award in early summer and will close on September 30 with over 1,000 submissions from library users and advocates across the country. Awardees will be selected in December and announced in early January, ahead of the award presentation at LLX 2023.

**Unite Against Book Bans**

CMO plays a key role in supporting the Association’s new Unite Against Book Bans campaign, launched on April 4. 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 ALA Annual 2022, ads placed on the Feathr digital ad platform garnered 280,827 views, 1,528 clicks, and 657 conversions, with a cost per conversion of $2.32.

**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 June 1, 2022 – August 30, 2022

36,500 articles/mentions
6.2 billion in circulation
$22.2 million in publicity value

Upcoming Events

September      Library Card Sign Up Month
November       Giving Tuesday
December       Year-end Giving

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: 4 staff (8 positions)

Revenue Stream(s) the Unit Supports:

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

Status Report on Pivot Strategy, Aligned Unit Goals:

Successfully launch and reach attendance target for LibLearnX in FY23 to meet, enrich, and celebrate the evolving needs of library professionals; attract and retain early career and new library workers; and to create greater visibility of ALA’s assets. The areas of focus this quarter include:

- Securing facility contractual terms that protect ALA in the post-Covid landscape
- Securing future dates and locations for 2024
- Promoting program based on the work of the LibLearnX Subcommittee
- Marketing event to highlight the unique features of LLX
- Collaborations with local constituents in New Orleans community/southern region for the first in-person LLX
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
- Securing facility contractual terms 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:

The 2022 Annual Conference and Exhibition closed with an attendance rate that met 91% of the financial target with 8,100 paid attendees and 14,003 total registrations. Exhibits and advertising met 92% of the financial target with 561 exhibits sold. Initially, CS faced many inquiries from constituents, with the lifting of the mask mandate and Covid protocols within Washington, DC. CS worked with ALA general counsel to update the health and safety policy that were in place for the conference. The after-event feedback shared an appreciation for ALA’s health and safety precautions, including reports that the maintained protocols were a deciding factor for exhibitors to secure their commitments to attend the event.

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

The marketing and promotion strategy to engage the ALA member-public and constituents, was finalized for the upcoming LibLearnX. CS and CMO worked to develop a series of talking points for both members and non-members. The promotion will be amplified around key dates and event components including, Call for Education, Sessions Announced, Studio Speaker Announcements, Marketplace Features, and Registration Opening.

Hashtag: #LibLearnX

Sample messaging for LibLearnX: The Library Learning Experience:

- An event for Library professionals, premiering in-person in January 2023, in New Orleans, LA.
- Experience-based learning, to include engaging discussions, hands-on workshops, forum, idea exchanges, “bite-size” learning, and other specific formats to match your learning styles and objectives.
- A conference designed to motivate, inspire, and engage in discussions that will shape the future of libraries and your library communities.
- Authors, thought leaders, and celebrity speakers who can inspire action within the library professional community and expand on the central event theme and topical areas.
- Programming ideas and tips that will reflect field best practices, have clear learning objectives, and focus on applicable content, instructional design, and diverse audiences. Attendees can build schedules around varied subject areas, including Equity, Diversity & Inclusion, the Future of Libraries, Readers Advisory, Professional Development, and Human Resources.
- Connection, support, and high-impact learning for all library workers, in all types of libraries, at all career points.
- Education designed by library professionals for library professionals, focusing on similar needs, goals, and challenges.
- Participation in the event is guaranteed to strengthen your connections and knowledge, while also supporting the association that advocates for your industry and advances our shared mission.

Describe the Most Impactful Unit Activities this Quarter:

1. ALA 2022 Annual Conference & Exhibition
   https://2022.alaannual.org/
2022 Annual Wrap-up

2. On July 8 – Conference Services, in conjunction with the LibLearnX Subcommittee, launched the call for education for the first in-person LibLearnX: Library Learning Experience. The call was open until August 9. The event is scheduled for January 2023.

3. On August 8 – Conference Services, in conjunction with the ALA Conference Committee, launched the call for presentations for the 2023 ALA Annual Conference. The call will be open until September 16. The event is scheduled for June of 2023.

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

In October, Conference Services, with the support of CMO, will launch registration, marketing, and promotion for the LibLearnX: The Library Learning Experience. The official dates are January 27-30, 2023 and will feature innovative and participatory education programs and highlights such as ALA Gives Back, Book & Media Awards (Virtual), I Love My Librarian Awards, LLX Marketplace: Exhibits and Ideas Xchange, LLX Studio, and the Youth Media Awards.

CONTINUING EDUCATION

Revenue Stream/Division Manager: Daniel Freeman

Budget Amount (Overall Revenue/Expense): $675,989/$710,260*

# Of Staff: 2

Revenue Stream or Division:

☒ Continuing Education

*During the setup year of the CE Unit, approximately $200,000 expenses were budgeted which ended moving over to IT.

Status Report on Pivot Strategy, Aligned Unit Goals: rf

As efforts to centralize and standardize CE across the association continue, The CE unit assisted units across the association while also offering a busy schedule of events generated by the unit:

- Standardization efforts that began with the launch of the new CE site have expanded, including:
  - Streamlining the processing of purchase orders and direct invoices with MRS and Finance & Accounting.
- Initiated development and testing of a member-exclusive events module that will be rolled out in early FY23. This will provide divisions and offices with the ability to support and drive membership by offering webinars that are visible and available only to members.
- Helped to increase eLearning collaboration between ALA units by facilitating a co-branded webinar, collaborating with OIF on future webinars and planning an eLearning partnership with YALSA.
- Worked with offices, divisions and the Continuing Education Cross-Functional Team to begin developing an ALA-wide strategy for free events and member-exclusive content.

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 is developing initiatives in the following areas of opportunity: CE inter-unit collaboration, the repackaging of existing content, creating “stacked” products, the use of member-exclusive events to drive membership, and leveraging data from our eLearning site to drive revenue. Units across ALA continue to work on closing the eLearning revenue gap. Coordination among units—a new way of working in this area—is crucial to this effort. Increasing the volume of events is an obvious strategy for increasing revenue, but without coordination, we run the risk of oversaturating the market.

While the slowdown in CE revenue in FY22 has been an unwelcome challenge, it makes it clear that the market for CE has shifted in the wake of the economic challenges of the past two years. By leveraging ALA’s imprimatur and maximizing collaboration to get the most out of our content, we are focusing on increasing how we leverage our competitive advantage in a shrinking market.

**# Of Members/non-members/other stakeholders reached during quarter:** Over 17,000 have created accounts on the new site; over 40,000 reached through marketing, many more through word of mouth.

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

Member engagement with the CE unit and the ALA eLearning site is positive, and the revenue gap from early FY22 continues to close:

- A new eLearning partnership with YALSA has been approved by ALA leadership and should lead to increased revenue for both units.
- We are working with OIF and FTRF to create member-exclusive access to pre-recorded forum content and drive registration for paid events.

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

- As of the end of the fourth quarter, sales are at approximately $550,000. The CE unit anticipates closing the fiscal year at around 70% of the original budget. At the end of Q1, sales were at 50% of budget.
- In June we launched a new RDA eCourse which sold out within 3 weeks. We launched several new RDA workshops that had strong sales. In addition to strong sales for the RDA Lab series, which began in April, the unit generated over $20,000 in sales from these events during the fourth quarter.
- We began working with the developer on a recommendation portal and demographic survey that will allow us, in conjunction with ALA Membership, to use data from the site to drive targeted marketing for both eLearning and membership.
- In March we launched a two-course bundle on serving underserved children and teens, generating over $12,000 in revenue.
- In partnership with the Music Library Association, we launched the Music Cataloging Course Bundle, which has generated over $20,000 in revenue to date.
- Continuing to consolidate bulk purchase processes, with over $12,000 in revenue generated in the third quarter.

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

- We are developing a broad anti-racist library services eCourse that will likely launch in early 2023.
- New internal partnership efforts include:
  - Plans to propose a partnership with roundtables for paid events.
  - The newly established partnership with YALSA.
  - A new course in partnership with the Sustainable Libraries Initiative.
- We are working on a new series of content where we bundle and promote products from the most prominent members of our instructional community, modeled on the “masterclass” concept.
- Efforts to increase ALA’s CE reach to the international market:
We are in the early stages of designing a proposed CE product for Library Staff in targeted international regions. This will be a primer series for new library staff—mostly paraprofessionals—to provide an overview skillset.

As RDA continues to become the standard in more countries, we are continuing to collaborate with Digital Reference on RDA events targeted to specific international audiences with either international instructors or translators for U.S-based instructors.

CORE: LEADERSHIP, INFRASTRUCTURE, FUTURES

Unit Manager: Julie Reese, Interim ED per Kerry Ward’s Sept 23, 2022 departure to head an Ohio-based association

Unit Budget:

<table>
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<tr>
<th></th>
<th>April FY22 Budget</th>
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Both YTD revenue and expense are well under budget, resulting in a YTD negative variance of ($15,722), compared to budget. Note that beginning in mid-April, so barely reflected on this report, the executive director began splitting time/salary with the ALA Communications and Marketing Office. This arrangement continues to the present. The FY22 year-end result (August) will show a positive variance in the salary line. Offsetting salary savings are two areas of revenue concern: membership and continuing education. Webinar revenue is the largest variance in YTD actuals for two main reasons: fewer webinars than planned and lower than anticipated registration. CE staff project that the variance will improve by fiscal year end but will not make budget.

# of Staff: 5 FTE

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 is meeting Sept 20, 2022, to continue development of the strategic plan.

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

# of Members/non-members/other stakeholders reached during quarter ending August 2022, for Core CE:

Produced:
• 5 courses reaching over 100 individuals
• 4 paid and free webinars reaching over 250 individuals and groups

Describe the Most Impactful Unit Activities this Quarter:

• On July 29 Core held another AvramCamp, an online event that allows women and non-binary technology workers a safe space to explore the common challenges they face.
• The Core Metadata & Collections Section Leadership Team endorses the ICOLC Statement on the Metadata Rights of Libraries.
• The Core Publications Coordination Committee held an open house zoom to encourage new authors and discuss development topics.
• The Core journal LRTS will go open access in early 2023. This is the culmination of years of work. Also in 2023, all three journal will move to a new platform. This project will take large amounts of volunteer and staff time.

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

• The Core Forum will take place Oct 13-15 in Salt Lake City. More than 40 programs and preconferences are being presented. Registration is 230 as of Sept 19. Budget attendance is approx. 300.

DEVELOPMENT OFFICE

Unit Manager: Tracie Hall/Anne Manly

Unit Budget:

• Budgeted revenue and expense $3,080,000
• Actual revenue and expense According to the Finance and Accounting Office, Development has exceeded its top line goal of raising $3,085,000 in grants and contributions for FY 2022

# of Staff: 2 full time; 2 part time

Revenue Stream(s) the Unit Supports:

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

Status Report on Pivot Strategy, Aligned Unit Goals

Development is working to secure funding in support of key programs related to adult literacy, digital inclusion, and capacity building for libraries whose budgets were most negatively impacted by the pandemic.

Describe the major issues, trends, opportunities, or concerns that your unit has or is responding to at the closing of this fiscal quarter
Staff member Remigio Torres took time away from his role as Development Associate to welcome the birth of his second son. ALA Print Operations Specialist Terrence Miltner stepped in and admirably managed important aspects of ALA’s Gift Processing function. In addition, Development welcomed Tiffany Mack in her role as Executive and Development Office Assistant.

ALA has begun its work with the Alford Group, which was retained to assess ALA’s fundraising readiness, engage key stakeholders and assist as we prepare to potentially launch the largest fundraising campaign in the ALA’s history. The campaign will focus on supporting Mission Support and Sustainability, Social Justice, and our endowment for long-term growth. To that end, Alford will conduct a feasibility study to determine how best to conduct a campaign for these vital growth areas. To date, Alford has worked with ALA to interview key internal stakeholders, identify key campaign participants, and conducted a visioning session with ALA Unit Leaders to highlight the campaign’s bold vision, review the three funding priorities, and get Unit Leader’s help to identify the compelling nature of each priority area. Using input from this session, Alford Group will clarify key messages into a “campaign prospectus” that conveys the impact that can be achieved through a campaign and articulates how and why donors should help support ALA’s vision. The messaging in this campaign prospectus will then be tested through one-on-one interviews and further focus groups during the feasibility study.

# of Members/non-members/other stakeholders reached during quarter (for all Units):
600

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

Through the successful Philanthropic Advisory Group programming at Annual which included a well-attended reception at the Library of Congress for ALA donors and various receptions for Library Champions and other stakeholders, and roundtable conversations on the prospective campaign, the Development Office reached an estimated 400 people.

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

During ALA’s Annual Conference the Development supported the following:

1. **Expanding Information Access for Incarcerated People, Convening and Hearings.** This all-day pre-conference event invited practitioners and experts to come together in this often-isolated area of LIS services. This first of its kind event hosted nearly 200 participants.

2. **Library Champion VIP reception.** This annual event was hosted by the Philanthropic Advisory Group, OverDrive CEO Steve Potash, and the Development Office.

3. **Each year, Development hosts an Annual event celebrating our Legacy Society and 1876 Club members, who are among our greatest and most steadfast supporters, having dedicated years of service and significant financial contributions to ALA.** Hosted by Dr Carla Hayden at the Library of Congress, we expanded the invitee list to include publishers, grant makers, governmental agencies, long-time donors, and new-to-ALA individuals identified as having both capacity and values aligned with our mission.

4. **PAG’s presentation of From Partisanship to Philanthropy: How You Can Transform Your Library’s Culture.** This session discussed how organizations can overcome their internal divisions and begin to build a culture of philanthropy.

5. **“Intellectual Freedom, Media Literacy, and Access to Information: A conversation with The New York Times” in which the NYT was joined by Dr. Nicole Cooke for a lively, standing-room-only session.**

6. Development supported the Alford Group in their interviews of various key stakeholders.
In addition, Development Office Assistant Director of Corporate and Foundation Relations Anne Manly personally visited with every Library Champion attending conference, and working the MRS office, visited and left materials at every booth of every non-member vendor.

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

1. In the next quarter, the Development Office will:
2. Develop and implement a strategy for increasing DAF (Donor Advised Funds) donations by direct engagement with DAF managers.
3. Plan for Giving Tuesday and end of year giving.
4. Work with PAG to strengthen the Legacy Society and 1876 Club and continue to build a culture of Philanthropy within the Association.
5. Work with the External Partners Cross Functional Team to codify Sponsorships opportunities across the Association and to work with PAG to expand these efforts. Continue collaborations with CE and Publishing to offer sponsored webinars. Work with the CFT to establish a text library and implement grant-related communications and sharing across units.
6. Continue programmatic support of such programs as the Civic Imagination Stations and Expanding Information Access
7. Continue work with Individual Planned Giving opportunities.
8. Support the Alford Group.

**FINANCE AND ACCOUNTING**

Unit Manager: Dina Tsourdinis

FY 2022 Budget Amount (Overall Expense): $1,365,749

# of Staff: 7 full-time staff and 3 temporary staff

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 closing process: Beginning in December 2022, the department moved to a monthly reporting schedule to provide more timely information to our members and unit managers.
To bring our accounting closings current, we are working on month-end closing activities for multiple months and closing Accounts Payable by the 15th of the following month to obtain control over timing.

Cross-training: This is not possible during the current state of our financial reporting. We do not have adequate staffing in the department of F&A to achieve cross-training.

The Muller Consultant completed the following work Sept-March 2022. His work represents only 20% of the portion of closing iMIS.

Phase 1 – Prepare detailed procedural documentation of each revenue stream, from initiation to recording in the general ledger, and provide revisions to make the process more efficient and summarize in an Accounts Receivable Manual. – This is completed. This work is done in-house now.

Phase 2 – Process transactions utilizing the procedural documentation prepared in Phase 1. Provide hands-on training for ALA staff so that they understand the process and can then train other ALA Staff. -Ongoing by ALA staff.

The closing of non-iMIS revenue, which represents 70% of the overall month-end process is handled by FORVIS consultants who will also document the process. The iMIS revenue process has been a priority to provide timely member financial information, and the process is performed by the F&A team.

The Accounting procedures will be documented for the system upgrade and the cross-training of staff.

This plan is flexible as I gain more knowledge of the hands-on details involved in each process. Even though the remote work environment has proven to be a challenging training landscape, cross-training is critical for the full functioning of the department to reduce bottlenecks and ensure the work continues. This will also provide for continuous workflow when there is turnover amongst staff members and unanticipated absences.

The Accounting department will be reorganized after researching similar organizations. We are in process of interviewing for an Accounting Manager position to lead the most challenging aspect of work around revenue identification.

There is a need to add a senior accountant to the department. Our activities for revenue and other reconciliations needed are very heavy in volume and complexity. This request will be explained in a separate report.

The Controller will oversee payments, general accounting, and grants accounting for now. This structure will allow the Accounting Manager and Senior Accountant to be cross-trained on the monthly closing process to expedite financial reporting and cross-training on critical tasks.

The Accounts Payable process was reviewed and updated to eliminate delays. Our Accounts payable volume is heavy, and we began a brainstorming session which resulted in eliminating unnecessary steps on the part of the Controller to make the process more efficient while empowering the Accounts Payable staff more. The CFO receives a status report weekly to monitor progress and Key Performance indicators relating to payment accuracy and timeliness. The delays are improved but the staffing for A/P is still a priority.

Please see below for the staffing issues I have outlined.

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 who process payments without identification, and the ALA-issued manual invoices without a centralized system in place are major obstacles being navigated in closing the association’s books.

Stabilizing staffing in the Accounting Department: Turnover of temporary employees in the department has made it difficult to gain traction to catch up on the financial reporting needs of the Association. It has been difficult to find staff in A/P, thus ALA has changed staffing agencies to try another source of temp-to-hire positions. Even with qualified staff from our new agency, temporary staff finds other employers of choice.

Need to update financial accounting systems: Some of ALA’s current systems and protocols are cumbersome and/or antiquated. Changing systems requires a lot of work and it is a task that needs the department to be fully caught up requiring IT support.

Additional Training for Unit Managers: Some managers have expressed their lack of understanding of rules and procedures. We will conduct more training to educate everyone and allow for their questions. Division EDS often share that they do not understand financial reporting and thus are heavily impacted by their Boards’ past impressions, causing miscommunication and confusion and requiring a lot of support. Training is now being

The Grants process was updated in conformance with current Generally Accepted Accounting Principles (GAAP). All fundraising units and the accounting team will be trained on June 1st. This will be important in terms of revenue recognition in the interim and budgeting.

# Of Members/non-members/other stakeholders reached during the quarter (for all Units): Approximately 350.

Describe the Most Impactful Unit Activities this Quarter

- Established monthly check-in meetings with new BARC and F&A Board Chairs. During these meetings we review the summary financial results from the most recent period and discuss future committee meetings.
- Closed 3 months, February - April 2022. (April release on Sept 7th)
- Met with units with current deficits to develop a plan for year-end and discussed their projections through year-end.
- Initiated the Employee Retention Grant application for federal funding and submitted all documents for the application process.
- Initiated the Property Tax Exemption for the Washington office condominium. The local government authority confirmed that we would need to apply annually after approval of tax exemption status.
- After discussing business growth opportunities internationally with division AEDS as well as unit managers, we concluded that a more efficient and cost-effective process for accepting global currencies. We met with Transfermate, a payment platform for international currencies, and have established an account for A/R and payables. The accounts were approved, and we are moving forward by pilot testing RDA in the fall of 2022.
- A new application will be used for the calculation and accounting of the life members by using our Great Plains Accounting software rather than using iMIS. We own the module that we are not using. Our IT team determined that we could not operate in iMIS for these activities.
- The third iteration of the budget for FY 2023 is finalized after the Executive Board approved a small surplus. Additional alignment areas were identified inclusively.
- The CFO and Budget Director met with budget managers in August and conducted training sessions. These sessions were received well by ALA Unit Managers and were recorded for future use.
- Finance submitted the Request for Information (RFI) for the Endowment and Short-Term investment fund investment management. We received 12 responses to the RFI, with two firms declining us due to our unique model of the Endowment Trustees making the investment decisions rather than the Investment Management firm managers who are experts in institutional investing.

Select Future Activities and Events Through the End of the Next Fiscal Quarter
• Rebuilding the Finance and Accounting team and focusing on identifying quality improvement initiatives. The task of catching up and remaining current is flexible and depends on major projects such as audits. Training new team members differently to achieve retention and build strength. Divide the work into smaller portions to retain new staff and ensure their success.
• Develop and deliver Accounts Payable training to all Unit Managers and continue budget manager training in Prophix.
• Applying for a property tax exemption for the Washington office condominium would save $75,000 + annually and allow us to apply for a certificate of the error to recoup past payments.
• Continue to work with Expense Reduction Analysts and Unit Managers on implementing cost containment.
• Finalizing the RFP process for the Endowment Fund Investment Management and working with Endowment Trustees to decide.
• Fully Implement a new grant revenue recognition and tracking update monthly rather than quarterly. All grants were trued up as of February 28, 2022.
• Start planning the FY 2024 budget process with new ideas and recommendations to the management team for consideration.
• Work on the new OAWG initiatives.

Governance Office

Unit Manager: Sheryl Reyes

Unit Budget:

Governance (includes member leader budgets)

• Budgeted revenue and expense $0 / $362,802
• Actual revenue and expense $0 / $74,370

Executive Office

• Budgeted revenue and expense $162,428 / $1,373,025
• Actual revenue and expense $26,395 / $509,683

# of Staff: 4.5 Governance FTE

Revenue Stream(s) the Unit Supports:

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

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.

An Affiliate luncheon occurred during the ALA Annual Conference, which ALA President Patty Wong facilitated. From this collaboration and information sharing event, additional organizations signed up to work with ALA in the pilot program. The pilot will use a data driven approach to identify prospective members and create coordinated membership campaigns.

**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 Office is working in collaboration with partners and members to conduct the inaugural ALA Governance Institute set for January 2023 during the Library Learning Experience (LLX) event. The goal for this motivational and inspirational institute is to better prepare member leaders for service with clear expectations, deeper understanding of effective parliamentary practice, fiscal stewardship, and communication.

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

Current projects entail researching volunteer engagement organization-wide, streamlining and improving Council management (communication, documentation, roster, etc.) and training and onboarding the new ALA parliamentarian. The kickoff of the internal cross functional teams for both Governance and Awards have initiated; charettes will be scheduled to help inform team goals and alignment of 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:**

**Operating Agreement Follow Up and Recommendations**

At the 2022 Annual Conference the ALA Executive Board voted to:

1. Accept the Operating Agreement Working Group's final report and presents the rewritten policy and outline for changing internal processes and procedures to ALA Committee on Organization for their review, continued association wide feedback, and forward to the Executive Board and Council for final review and vote.

2. If the new policy is approved, authorize an Implementation Task Force to develop a new budget process that consists of ALA management including Division Executive Directors and ALA division budget leaders to outline a new budget process. This process should be developed during FY23-24 with a report to the Executive Board, Division Boards, and Council. The goal would be to implement a new process for FY25.

3. Encourage the ALA Executive Director to form an internal working group to revise the Operational Practices that update and include accountability and service expectations for shared services.

Member leaders are interested in the evolution of this work. There are still questions about the operating agreement, thus member leader and staff engagement are key in the success of a new implemented policy. The Committee on Organization is set to discuss the Operating Agreement at their upcoming committee meeting scheduled for September 2022.

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

**Annual Conference Governance Events and Programs**
ALA Council Meetings - Councilors rated the overall ALA Council hybrid meetings as very good 4.0 (out of a 5 point scale). 125 Councilors attended in person, 33 digital, and 21 did not register. The attendance rate is slightly lower compared to previous attendance rates, but still strong.

Inaugural Celebration - More than 200 Annual Conference attendees celebrated the incoming 2022-2023 member leaders of the Association.

The Governance Office help facilitated numerous programs and social gatherings during Annual Conference. Programs include the Opening General Session, President & ALA Awards Program, and Closing General Session. Social events included the celebration of spectrum, emerging leaders, award recipients, affiliates, member leaders, AC attendees, and much more.

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

**ALA Annual Conference Hybrid Governance Meetings**

It is of historic and procedural note that this was the first governance meeting in the history of the association to take place with mixed virtual participation. Although the majority of voting members attended in person a good number participated virtually.

**Onboarding the ALA Parliamentarian**

Eli Mina, who has served as ALA’s parliamentarian for 20 years, retired at the adjournment of the 2022 Annual Conference in Washington DC, June 23-28, 2022. New ALA Parliamentarian, Adrian Stratton began orientation and onboarding during the summer of 2022 and officially stepped into this role shortly thereafter.

**Council Vote of ALA Constitution Rescission & ALA Bylaws Revision**

The ALA Council voted to revise the governing documents of the association through resolutions adopted to 1) rescind the Constitution and 2) generally revise the Bylaws. The current Constitution and Bylaws will remain in effect until the necessary administrative steps are taken which is expected to conclude with a spring 2023 ballot proposal for the adoption of a new Bylaws. The ALA Constitution and Bylaws Committee in partnership with the ALA Governance Office and ALA Parliamentarian is leading the effort to revise the ALA Bylaws and plans to release the first draft by the beginning of the new fiscal year FY23.

**ALA Nominating Committee**

The ALA Nominating Committee hosted an inaugural online candidate open house for members interested in becoming the 2024-2025 ALA President or 2023-2026 Councilor at Large. The webinar covered the role and responsibilities of an elected leader, an overview of the nomination process, and an interactive Q&A segment. The committee received positive remarks from members who appreciated the information provided.

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

**ALA Bylaws Revision**

The ALA Constitution and Bylaws Committee will be working with member leaders during the next fiscal quarter to provide a solid proposed draft of the revised ALA bylaws for Council deliberation and vote at the January 2023 Council Meeting. Feedback data will be analyzed, and sessions will be facilitated by the committee.

**Volunteer Engagement**

The deadline for members to submit their ALA and Council Committee volunteer applications is September 30, 2022. President-elect Drabinski will be working with committees and Governance staff in making appointments for the 2023-2024 committee year.
The membership-wide Virtual Volunteer Fair is scheduled for September 14, 2022. This engagement opportunity is open to all ALA members to learn more about the different ALA volunteer opportunities across the association.

**Leadership Development**

ALA Governance/Executive Office will host the inaugural ALA Governance Institute at the January 2023 LLX event. Courses on communications (executive and meeting level) and financial analysis and fiduciary responsibility will be offered. Other ongoing leadership development opportunities are being worked on to strengthen and maximize governance oversight and operations.

**INFORMATION TECHNOLOGY**

**Unit Manager:** Sherri Vanyek through September 26, 2022 when new CITO Rebecca Headrick began her tenure

**Unit Budget:**

- Budgeted revenue and expense for Fiscal 2022 $3,582,065
- Actual revenue and expense as of April 2022 $1,700,795

**# of Staff:** 6

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

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

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

All the IT unit goals below support the Pivot Strategy in terms of IT operations and projects. Many projects were started in FY2022 and continuing into FY2023.

**ALA Technology Projects:**

1. **iMIS Membership System Upgrade**
   
   Launch date is scheduled for the weekend of November 4, 2022

2. **Drupal 9 ala.org Website Upgrade and Redesign**
   
   New redesigned site must be launched at the end of November 2023

3. **Continue to upgrade Shibboleth Single Sign-On Software to the remaining websites**
   
   All remaining sites will be upgraded by October 31st

4. **Assist Membership with the implementation of in-person events in iMIS after the upgrade.**
   
   Work with vendor to set up in-person events
5. **Clean up data in the iMIS membership database**
   Some cleanup will happen as a result of the iMIS system upgrade above

6. **Continue to monitor revenue and membership goals**
   Connect new dashboard system

7. **Replace 1/3 of Staff Laptops**
   Rollout is underway

8. **Move Financial Systems to the Cloud**
   GP Dynamics and Prophix Budgeting Systems

9. **Cloud Feasibility Assessment Study**

10. **Automate processes in membership system**
   Install and implement automation code

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

Our current IT staff of six is focused on keeping operations going and project execution as time allows based on priority. Given the resource constraints, the IT department is working diligently to decrease our technology debt. Replacing outdated technology will require investment, time, and additional resources. To address this, IT has requested additional investment dollars in FY2023 for the new Chief Information Technology Officer and to fund project work to reduce the technology debt. IT is searching for a Business Analyst to support process realignment and project execution and a lead digital developer to assist with the website redesign project. These resources are needed to meet the association’s major goals for FY2023.

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

- eStore tiered pricing options/different types of digital downloads - 7/2022
- Transitioning ALA Units into a consolidated email marketing account so that many email outreaches can be sent in concert with other marketing efforts - 8/2022
- Progress made on the iMIS membership system upgrade scheduled to launch on the weekend of November 4, 2022.
- Progress made on the ala.org Drupal 9 Upgrade and Website Redesign project scheduled to launch in November 2023.

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

- iMIS membership system upgrade scheduled to launch on the weekend of November 4, 2022.
- ala.org Drupal 9 Upgrade and Website Redesign project scheduled to launch in November 2023.

**INTERNATIONAL RELATIONS OFFICE**

Unit Manager: Michael Dowling

Unit Budget:

- Budgeted revenue $35,000
- expenses $229,083
- -$194,083
- Actual (Apr) revenue $31,973 expenses $138,085 - $105,425
- FY22 Projection revenue $31,973 expenses $227,050 - $194,083

# of Staff: 1.5

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

Status Report on Pivot Strategy, Aligned Unit Goals:

Conference Services
IRO fell a little short of the goals of 300 international registrations and $90,000 in revenue at Annual and the Digital Experience. In total there were 269 international registrations from 48 countries that provided $84,791 in revenue, which included preconference and event revenue. There were 39 exhibitors from outside the U.S. which accounted for 6% of exhibitor revenue.

The ‘News You Can Use’ session on Ukraine with the U.S. State Department was of great interest and a positive engagement for ALA with the State Department. In total there were seven international focused programs, plus the International Librarians Orientation and the International Reception.

Continuing Education
In June IRRT and IRO hosted “Perspectives on International Digital Scholarship Collaborations During a Global Pandemic” which 77 registered for. There was a hiatus on webinars in July and August.

Contributed Revenue
ALA’s Ukraine Library Relief Fund raised $15,000 from May through August with over 150 members contributing.

Membership
FY22 goal was to increase international membership by 3%. Worldwide inflationary pressures and continued pandemic were negatives to any increase in international membership in FY22.

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 Ukraine Library Relief Fund” continues to be a positive opportunity for ALA and its members to make an impact internationally.
• IFLA Congress in Dublin was a successful event for IFLA and for ALA participation, but there is continued concern about IFLA leadership challenges and impact on stability and success of IFLA going forward.

• Planning for the 2nd National Libraries Summit and the 9th Sharjah International Libraries Conference.

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

• Over 250 international members attended ALA Annual in-person or took advantage of the Digital Experience.

• Hundreds of members and non-members who visited the ALA stand at the IFLA Congress in Dublin

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

• Multiple webinars have provided touch points and learning for members and non-members. ALA’s ability to mobilize a relief effort for the library community in Ukraine has reached members and communities across the country.

Describe the Most Impactful Unit Activities this Quarter:

• Annual Conference brought back in-person networking for U.S. and international librarians. Digital Experience allowed international librarians who were challenged to travel to be connected and benefit from ALA top level continuing education.

• Providing $15,000 to the Ukraine Library Association to help libraries and librarians in great need in their country.

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

Coordinated with Membership and others to promote new reduced International Membership.

• 9th Sharjah International Library Conference and 2nd National Libraries Summit.

• Nominations for ALA representatives to IFLA Governing Board, Sections, and Committees.

MEMBER RELATIONS & SERVICES

Unit Manager: Melissa Walling

Unit Budget:

ALA Membership Dues for the eight months ending April 2022 – on target

• Budgeted revenue and expense: $4,405,792/ ($105,000)
• Actual revenue and expense $3,077,519/ ($83,839)
# 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 MRS unit has three goals that support the pivot strategy:

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

ALA membership counts ended eight months at 51,173 after growing 2.9% since the beginning of the fiscal year. This is a 1% increase from FY21 and a 10% decline from FY20. This remains a projected decline due to the challenges of the pandemic and we are pleased to see the start of a slow recovery.

We anticipate that these numbers will continue a slow climb with a focused membership strategy and resuming in person events such as PLA and Annual Conferences. However, with 2/3 of ALA members paying dues from their own pocket, ALA dues revenue is sensitive to economic conditions. As of August 2022, the Consumer Price Index is 8.3% higher than last year.

The membership office also supports revenue generation for the organization beyond membership. This includes support for subscription sales and support of e-learning students. This internal customer service is a key role of the MRS unit and directly 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 Turnaround:** The number one priority remains rebounding ALA membership. We recognize that the rebound will take time and is reflective of the number of furloughs and layoffs that the LIS community has absorbed during the protracted pandemic as identified through exit surveys. A few recruitment highlights from the last quarter that we continue to monitor, improve and scale:

- Activated a joint membership recruitment campaign with the District of Columbia Library Association resulting in 7 new ALA Members.
- Leveraged a discount on the Learning Management System to incentivize lapsed members to reinstate resulting in 43 new members.

**Dues Standardization:** As a result of the recent action taken by Council for Round Table standardization of bylaws and dues, the MRS team has worked closely with the Round Table Coordinating Assembly Co-Chairs and Danielle Ponton, Program Manager, ALA Round Table on adoption and implementation. This work has been challenging and important work for the Round Table volunteers and we have had full participation and engagement from the Round Table volunteers. They are on track for a complete report to the Membership Committee in September 2022.

**Avenue M Membership Model Work and Membership Survey:** ALA will be re-engaging Avenue M as a partner in conducting a membership survey as well as updating the membership model analysis. This work is important as the employment landscape has shifted since 2018 when the last survey was conducted. The all-member survey will be sent by the close of 2022 and will include both current ALA members, recently lapsed members, and other ALA customers. The results of this survey will be shared in early 2023 and we plan for the membership model work will be presented to Council at ALA Annual 2023. This will delay the overall implementation of the new model to FY25.

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

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

**Conference Engagement:**
Significant resources went into attendee engagement at ALA Annual Conference. The ALA Lounge experience featured video capture, a computer kiosk with new member links and resources from across ALA. All divisions and round tables were also able to have volunteer leaders in the Lounge for “Table Talks” to showcase their group. In addition, Tina Coleman from the membership team joined the Conference Orientation Session hosted by the New Members Round Table to discuss how new members can get involved.

**New Member Onboarding Program: Year One Summary:**
The experience a new member has in their first 12 months of membership impacts their long-term relationship with the association. The membership onboarding campaign launched in August 2021 to ensure that our new members learn about everything ALA membership can offer. This effort was supported through the sponsorship of OverDrive.

**New Member Center Web Site:** [http://www.ala.org/membership/new-member-center](http://www.ala.org/membership/new-member-center)

**New Member Orientations:** The ALA office coordinated with the ALA Membership Committee and the New Members Round Table to host 4 virtual orientations. Participation in the sessions ranged from 20 – 100 participants. The orientations were the ideal opportunity for new members to ask questions of staff and volunteers and a great opportunity for new members to ask questions about divisions and round tables to find their membership home.
E-mail Campaign: The email campaign ran for the entire year and delivered 23,370 emails to new student members and 31,053 to all other personal members. The open rates for the emails ranged from 48%-54% which is double the industry average for non-profits. We also saw higher than average click rates of 14-16%.

Describe the Most Impactful Unit Activities this Quarter:

- **iMIS Upgrade**: The membership office is partnering with the IT office to test the new iMIS upgrade. Key features will include an improved “My Account” page for users as well as the potential for improved processes for staff. The membership office will be testing key features from membership, subscriptions and registration processes.

- **New Code of Conduct Implemented**: On August 1st, a new Online Code of Conduct went into effect. The new Online Code of Conduct reflects the 1st year work of the Code of Conduct Committee, and motions the Executive Board approved in April, 2022 (reference [EB 12.33.1](#)) that voted to prohibit paid commercial postings in Connect communities and to create one designated community in Connect where ALA members can share job postings. The implementation of the new Code of Conduct has already helped some important ratios and key metrics (Email Open Rates, the Average Replies/Threads Ratio, and the Unsubscribed Rate to Digests of communities) that we use to indicate the value of Connect to members.

- **Launching new Round Tables**: The membership office is the lead in ensuring that our new Round Tables – Coretta Scott King Book Awards Round Table and Library Support Staff Round Table – are ready for new members to start joining at the start of the new fiscal year. The hard work happens with the volunteer leaders preparing the Round Table for the upcoming year, but lots of behind-the-scenes details go into place to ensure that the groups are members and donations starting for FY23.

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

**Recruitment of non-members on the Learning Management System**: As a first step in operationalizing member recruitment, we plan to automate a campaign promoting membership to non-members taking courses on the LMS. The value of automating campaigns like this is that since e-learning is a year-round engagement activity for our community, we can continually engage non-members in real time to promote membership. We trust that they will have a high-quality experience on the LMS and therefore see value in maintaining a year-round connection with ALA and receiving discounts on future programs.

- **Membership We site and Membership Cross Functional Team (CFT)**: The Avenue M research indicated that most lapsed members perceive the cost of membership to exceed the value. With this in mind, we are auditing the membership web site to clearly articulate the value of membership and outline membership benefits. One of the key benefits of membership is the ability to join a division or round table. The membership cross functional team also recently completed a benefits inventory across the association. This is a visual representation of the value that a member receives and includes some information on additional benefits available through division and round table membership. The membership CFT is also exploring ways to enhance the value of the organizational membership package that we can pilot this upcoming quarter.

- **Customer Service**: We are continually thinking about how to improve the level of customer service that we provide. We hope to invest in some customer service technologies to better track and measure the customer experience in FY23.

Dashboard: ALA Connect Key Performance Indicators

Current Active Users:
The ALA Connect Community continues to primarily benefit for members. We have 53,039 Active Users in ALA Connect. From June to September, we have had 3,420 first-time logins. Close to 1 out of 4 Active Users in ALA Connect are Non-members. We continue to use Passive Marketing and automations are being used to promote the benefits of membership to Non-members.

We expected a slight dip in usage of Connect during the summer months, and this was seen in July, but August has seen growth in many of our measured key metrics and ratios. The biggest upward trend has been the Average Replies/Thread Ratio. In May 2022, the Average Replies/Thread in all Communities was .74 and in August the Average Replies/Thread Ratio was .96. That is an upward trend of +18.9%. In August 2022, the Average Replies/Thread in the ALA Members community has surpassed the previous highest mark of the year, at .48 in June, with an Average Replies/Thread Ratio of 2.98. That is an average of a little more than 6 times the previous highest mark of Average Replies/Threads in the ALA Members Community.

Communities:
The number of communities in our ALA Connect ecosystem continues to grow. We are currently at 1688 communities. Two new microsites have been added to represent two new Round Tables (Coretta Scott King Book Awards Round Table and the Library Support Staff Round Table). In the ALA Connect Community, Committees represent 61% of the ecosystem, followed by communities classified as Communities at 24%, and the third highest share of communities in our ecosystem are Workplace communities which represent 11% of the total.

Email Statistics:
Like the upward trends that we see with the **Average Replies/Thread** Ratio we continue to see an upward trend with users engaging with ALA Connect as a communication tool and knowledge-sharing tool. This is indicated by the sustained number of **emails sent/emailed viewed** in Connect, the increased **open rate** of that email.

### Library Statistics

We continue to see a consistent number of **library entries** and the positively correlated **library views** of these documents shared. This is a good indication that members are using Connect consistently to share information between users and while doing the Committee work of the association.

### OFFICE FOR ACCREDITATION

**Unit Manager:** Karen O’Brien

**Unit Budget:** 112
Unit Budget:
- Budgeted revenue and expense YTD 22 Apr: Revenue $88,829 Expense $164,269
- Actual revenue and expense YTD 22 Feb: Revenue $87,353 Expense $133,453

# 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 availability of ALA-accredited degree programs

• Standards update draft proposal feedback in process. Emphasis in the update is on equity, diversity, inclusion, and access with conversations underway that include an ALA Exec Board advisory group which includes the ALA executive director, ALA president and immediate past president (who presides in the meetings), and the president-elect. Other areas of focus in the update are the state of the expanding field and ALA’s core values

• 63 institutions with ALA-accredited programs, newest added (Old Dominion) with January 2022 decisions.
  2 programs In Pre-candidacy 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 June 2024)

• Trended metrics on diversity, faculty/student ratios etc., available publicly at [Excel]
  https://www.ala.org/educationcareers/sites/ala.org.educationcareers/files/content/Trended_stats_to_2020_0_1.xlsx

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

1) Providing opportunities for feedback on the proposed 2022 Update to the ALA Standards for Accreditation of Master’s Programs in Library and Information Studies | About ALA

2) Supporting fall comprehensive reviews in progress (see Schedule of Reviews at https://www.ala.org/aboutala/sites/ala.org.aboutala/files/content/review_schedule_current%20%281%29.docx . First return in the era of COVID to mostly in-person visits.

3) Managing 31 programs in various stages of the comprehensive review cycle.

# of Members/non-members/other stakeholders reached during quarter: 850

Narrative Description Members/non-members/other stakeholder engagement:
Fall comprehensive reviews are engaging with an estimated 500 stakeholder ALA reviewers, volunteers, leaders, and LIS program personnel.
Describe the Most Impactful Unit Activities this Quarter:
Comprehensive program reviews and gathering of feedback on Standards revision.

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

- Committee on Accreditation new member orientation at fall meeting Nov 17-18
- CoA meeting in Jan 19-20 to close fall reviews
- Meeting forums/summits on proposed Standards update

OFFICE FOR DIVERSITY, LITERACY AND OUTREACH SERVICES

Unit Manager: Kevin D. Strowder

Unit Budget:

Office for Diversity, Literacy & Outreach Services (ODLOS)

- Budgeted revenue and expense: $14,125/($399,529)
- Actual revenue and expense $17,488/$532,192

# of Staff: 2, plus one part-time contractor

Revenue Stream(s) the Unit Supports:

☑ Conference Services
☑ Continuing Education
☑ Contributed Revenue
☑ Membership
☑ 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.

ODLOS, in partnership with the ALA Executive Office and NALCo, hosted a strategy session to ignite new interest around the RFP that invites consultant firms to consider execution of the Diversity Counts & Longitudinal Study. The first round of targeted outreach didn’t bring the desired outcome due to the complex nature of this initiative as it relates to the skills of the firms.

- Strengthen the value proposition of ALA as a leading provider of Continuing Education on equity, diversity and inclusion in FY22.
The virtual sessions contracted for FY22 closed out with great feedback from participants. However, the demand for more programming prompted ODLOS staff to pause due to capacity. A strategy to train new facilitators will launch this fall and deliver initial session at LLX.

- **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 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:

**Member Retention After ASGCLA Dissolution**

The membership office contacted former ASGCLA members for one final recruitment push this summer in the hopes to recover a few additional members. The outcome of this has yet to be shared and discussed but will be reviewed in the coming months as we kick off the FY.

**Coretta Scott King Book Awards Round Table**

CSKBART continues to work closely with ALA and ODLOS staff to follow the checklist of projects needed to meet Round Table status. As of September 1st, 2022, they have now achieved this standing within ALA structure and can now invite members to join this newly recognized community. Staff direction in the areas of ALA governance, communications, member engagement, and program expectations remain the topic of discussion. The adjustment period for CSKBART brings about new challenges that may call for a revision of systems created to support their group.

**EDI Trainings**

Given the continued changes in staffing and the redistribution of roles and responsibilities, it is not viable to rely only on ODLOS staff for facilitation and meeting the training demand. Thus, we seek to build a new cohort of facilitators, which we envision including ALA members with a background in workshop facilitation and interested ALA staff. We plan to informally convene folks during the JCLC conference in hopes of gaining feedback about this new project.

Members reached during quarter (committees, EDI Assembly, RTs, Interest Groups) = 6,234

Combined members and non-members reached during quarter = 13,725

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

**Rainbow Round Table**

At ALA Annual 2023, RRT will host their 3-year postponed 50th Anniversary Gala at the Museum of Contemporary Arts. They have been working to secure new rates, vendors, and sponsorships to offset the costs associated with welcoming members. Due to the rising prices of services, there are some reservations and debate over how to make the event inclusive to folks who may not have the means to purchase tickets.

**EDI Assembly & ODLOS Advisory Committee**

COO presented to Council during ALA Annual the motion to support a restructure of the EDI Assembly and ODLOS Advisory Council and it was approved. It has been granted by the COO committee nearly unanimously. OLDOS’s EDI
Assembly (more specifically the sub working groups) maintains a consistent mission of elevating thought, knowledge, and collaboration in the field. Through discussion forums and text review, the Assembly aims to uncover best practices for challenging existing models within libraries. The ODLOS Advisory Committee, as the umbrella entity to the assembly, under leadership from the chair, has requested additional support. Managing both the committee and assembly pull more time than anticipated and the consistency in oversight is desired. This has also been approved by Council, and this term, ODLOS welcomed a new Co-chair and three new members-at-large.

Describe the Most Impactful Unit Activities this Quarter:

**Accessibility Program Manager**

After multiple phone screenings, interviews, and committee conversations with key members stakeholders, we are nearing the end of our search and hope to have someone in the role come late fall. Bringing someone into this role will allow for dedicated attention to ODLOS Interest Groups and Accessibility programming.

**Key Literacy Initiatives**

The ALA Committee on Literacy and Literacy Assembly continue their webinar series, with a webinar scheduled for October 12 highlighting libraries as literacy centers. ALA Executive Director Tracie D. Hall will join the panel to reflect on the concept of libraries as literacy centers and share takeaways from literacy visits to Charlotte-Mecklenburg Library and Houston Public Library.

ALA President Lessa Kanani’opua Pelayo-Lozada has pledged funds from her Presidential budget to support the Committee’s strategic planning initiative, specifically in hiring a strategic planning consultant.

**Building Cultural Proficiencies for Racial Equity Framework**


**Spectrum Scholarship Program – Masters and Doctoral**

The ALA Annual Conference and Exhibition welcomed nearly 160 Scholars from the 2019, 2020, and 2021 cohort for the Spectrum Leadership Institute. Our ODLOS Spectrum Advisory Council stepped up in a major new way to facilitate this experience for Scholars and spearhead the programming.

New ALA endowment honoring Satia Marshall Orange to benefit Spectrum Scholarship Program | News and Press Center

ALA Awards Spectrum Scholarships for 2022 | News and Press Center

Elsevier is sponsoring two Spectrum Scholars and is a new sponsor of the Spectrum Scholarship Program as of 2022.

Also new in 2022, the International Association for Social Science Information Service and Technology (IASSIST) is sponsoring a 2022 Spectrum Scholar interested in exploring data analysis, data intensive research, data science, data archiving or data repositories.

Select Future Activities and Events Through End of Next Fiscal Quarter:
**Ethnic Multicultural Information Exchange Round Table (EMIERT)**

EMIERT is in the process of creating a new Award under the Jewish Information Committee. They are also working to create more programing focused on multicultural work within the library community.

**ALA Working Group to Condemn White Supremacy and Fascism**

This member group has come together to implement crucial work and received feedback from Council during the 2022 ALA Annual Conference. We plan to meet in the coming months to discuss the results of Annual and how to continue with the next set of resolutions.

**Revision of 2017 Standards and Guidelines for Service for the Library of Congress Network of Libraries serving the Blind and Physical Handicap**

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. The has been granted the project and approved for a budget to engage a Working Group, Advisory Council, and Project Director. These folks will convene after the LLX sessions to kick-off the work plan.

**Preliminary Work Plan for Development of the 2023 Edition of the American Library Association Standards for Library Services for the Incarcerated and Detained**

The Advisory Council, ODLOS, and eternal partners held *Standards* hearings at ALA Annual Conference to include currently and formerly incarcerated individuals. The Drafting committee are in the final stages of development and getting feedback from stakeholders. A new ALA microsite/landing page has been created to house all latest updates.

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**OFFICE FOR HUMAN RESOURCE DEVELOPMENT & RECRUITMENT (HRDR)**

**Unit Manager:** Lorelle Swader, AED

**Unit Budget:**

- Budgeted revenue ($51,000) and expense ($216,675)
- Actual revenue ($254) and expense ($128,090)

**# of Part-Time Staff:** 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 6% 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.

# of Members (for Divisions): NMRT (1222)

# of Members/non-members/other stakeholders reached during quarter: Approximately 500 individuals.

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

We have continued to support activities of the various ALA committees, 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 application process went live in September. The Emerging Leaders application process closed in September and the selection process has begun.

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

- The Committee on Education (COE) revising the latest revision of Core Competencies for the generalist librarian for Council to adopt during the LLX.

OFFICE FOR INTELLECTUAL FREEDOM

Unit Manager: Deborah Caldwell-Stone

Unit Budget:

- Budgeted revenue and expense $45,000 / $404,538
- Actual revenue and expense through April, 2022: $183,178 / $253,309

# of Staff: 2.6 FTE for OIF/FTRF combined; three vacant positions in process of being filled. Three part-time contract employees managing specific tasks

Revenue Stream(s) the Unit Supports:

☐ Conference Services
☒ Continuing Education
☒ Contributed Revenue
☒ Membership
Status Report on Pivot Strategy, Aligned Unit Goals:

The Office for Intellectual Freedom continues to focus on initiatives that support ALA’s core values and overall mission, demonstrate the value of membership in the association, and promote member engagement. As a general fund unit, OIF provides indirect support for increased dues revenues and draws contributed revenues from members and donors invested in advancing the core values of intellectual freedom and privacy.

During FY22, OIF ended support for "Choose Privacy Week" and reduced production costs for the Journal of Intellectual Freedom. In addition to ongoing work to eliminate costs, re-evaluate programs, and redirect resources to products and services that best serve member needs, OIF pursues opportunities to generate revenue through the sale of books, products, and digital resources and solicit contributed revenue in support of its programs.

During FY23, with improved staffing, we hope to evaluate and re-imagine our challenge reporting and challenge support tools and services in order to improve the member experience and provide better data to identify member needs.

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

- OIF and PPA's State and Local Advocacy Office continue to work with 59 national partners and 25 state and local partners to promote “Unite Against Book Bans,” ALA’s grassroots advocacy initiative designed to activate and empower members of the public to oppose book censorship in their communities. As of September 18, 2022, 6352 individuals have signed up to join the campaign.
- Challenge support remains a priority for OIF and our contract staff, who continue to assist librarians, educators, trustees, and members of the public who request assistance.
- The volume of challenges continues at an unprecedented level. Between January 1 and August 31, 2022, librarians, educators, and members of the public reported 681 attempts to ban or restrict library resources to the Office for Intellectual Freedom, which targeted 1,651 unique titles. More than 70 percent of the 681 attempts to restrict library resources targeted multiple titles.
- The ongoing coordinated campaign to censor and restrict library resources via book challenges, legislation, and legal actions has increased demand for continuing education by OIF staff and member leaders within ALA’s intellectual freedom community. OIF staff is working closely with ALA’s Continuing Education unit and affiliated organizations to fulfill this need.
- OIF staff continues to work in partnership with the Public Policy & Advocacy Office to assist state chapters addressing adverse state legislation by identifying and advising on substantive legal issues and assisting with advocacy.
- The primary challenge for the Office for Intellectual Freedom is its current staff vacancies. In the interim, we have re-prioritized some tasks, and engaged three contract staff to support our ongoing mission priorities. Our newest contract staff member is Betsy Gomez, who is overseeing OIF’s initiatives related to Banned Books Week and public outreach. Joyce McIntosh and Karen Gianni, who staff FTRF, have also assumed OIF duties in the interim.

Member Outreach and Engagement (06/01/22 – 08/31/22):

From June 1, 2022, to September 1, 2022, OIF tracked 289 unique censorship incidents. From September 1 to September 12, OIF received 39 reports documenting attempted restriction or removal of library resources.
Notable Challenges:

- CatholicVote, a political advocacy organization not affiliated or associated with the Catholic church, called on members to target Pride Month displays in children’s and young adult sections of public libraries. Members were encouraged to check out all and retain any books in Pride Month displays to prevent anyone from reading or accessing the books during Pride Month. Multiple libraries reported that individuals checked out as many as 30 books at a time and failed to return them to the library.

- Members of American Redoubt movement targeted the staff and trustees of the Boundary County Library in Bonners Ferry, Idaho after the staff and trustees refused to promise not to acquire books members of the group claimed were pornographic. (None of the books had been acquired by the library.) The group initiated a recall petition seeking to unseat the library’s trustees and began a harassment campaign directed at library director Kimber Glidden and her staff that included threats and the shouting of Biblical passages threatening divine punishment. Glidden announced her resignation in August, 2022.

- The Huntsville, Texas city manager shut down the Huntsville Public Library and ordered the removal of a Banned Books Week display and a "Read With Pride" display that included a collection of books with LGBTQIA+ themes after receiving a number of phone calls from individuals in the community. The city manager states that the city is reviewing the library’s display policy and has decided that no books should be displayed during the review period.

- Intellectual Freedom News: 2920 primary subscribers reached weekly (100 new subscribers)

- “Fight Censorship,” an online resource collecting policies, guidance, and support resources for members and library workers addressing attempts to censor library materials, was redesigned and refreshed to improve the user experience and to highlight resources developed by state chapters: https://www.ala.org/advocacy/fight-censorship

Additional Advocacy, Education and Outreach:

Director Deborah Caldwell-Stone - Presentations

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<th>Books &amp; Graphic Novels</th>
<th>186</th>
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<tr>
<td>Programs</td>
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<td>Displays &amp; Exhibits</td>
<td>32</td>
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<tr>
<td>Other Challenged Resources (student publications, reading lists, pamphlets, First Amendment Audits, online resources, artwork)</td>
<td>46</td>
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- Maryland State Library,” Intellectual Freedom in Challenging Times,” June 6, 2022
- Intellectual Freedom Programming at ALA Annual 2022, Washington, D.C:
  - “Addressing Critical Race Theory Challenges in Your Library.”
• Federal Bar Association, Johnson County, Kansas, “First Amendment and the Banning of Books,” July 6-7, 2022
• Idaho Commission on Libraries, Info2Go!, “Collection Development Policies,” August 16, 2022

Joyce McIntosh, Assistant Program Director, Freedom to Read Foundation

• Where Intellectual Freedom and Social Justice Meet: A Call to Action, Moderator, July 12 and 13, 2022
• Northbrook Public Library (IL) Staff Institute, August 5, 2022
• Goshen Public Library (IN) Staff Inservice, “Intellectual Freedom and Legal Update,” August 9, 2022

Describe the Most Impactful Unit Activities this Quarter:

• Where Intellectual Freedom and Social Justice Meet: A Call to Action, Virtual conference hosted by the Freedom to Read Foundation and the Office for Intellectual Freedom, July 12 and 13, 2022. 519 persons registered to participate in an online symposium exploring the core values of Intellectual Freedom and Social Justice and how to find the balance between them. Speakers and discussion leaders included keynote speaker Sofia Y. Leung and member leaders Roosevelt Weeks, Emily Knox, Martin Garnar, Crosby Kemper, Nicole Cooke, Skip Dye, Maria McCauley, and Carolyn Foote.

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

• “First Amendment and Libraries,” ALA e-Course (September 2022) (With ALA Continuing Education) featuring Theresa Chmara, General Counsel, Freedom to Read Foundation, teaching a four-week course for CE credit exploring how the First Amendment governs the operation of publicly funded libraries.

• Banned Books Week, September 19-24, 2022
  o “Free Expression for Young People,” Monday, September 19, 1:00 p.m. ET, featuring authors who have written about or defended intellectual freedom discussing young people’s freedom to read and the censorship of books for young people:
  o “A Conversation With Author Jennifer Niven,” Tuesday, September 20, at 6:00 p.m. ET. Niven, a New York Times bestselling author of frequently challenged books for teens, discusses the implications of censorship for teens and their communities.
  o “How to Fight Book Bans in Your Community,” Wednesday, September 21, 2:30pm ET. Experienced activists who have been defending the right to read in their communities talk about community organizing and how you can fight book bans in your community.
  o “Practical Strategies for Defending Books in Your Library,” Thursday, September 22, 1pm ET
  o Drawing on ripped-from-the-headlines censorship challenges, four experienced library workers will provide practical strategies and resources that library workers can use to defend challenged materials.


PUBLIC LIBRARY ASSOCIATION (PLA)

Unit Manager: Mary Davis Fournier
Unit Budget:

- Budgeted revenue and expense:
  - FY22 Budget: $3,916,000 revenue/$3,064,252 expense
  - FY22 April 22 Budget: $3,700,000 revenue/$1,854,523 expense
- Actual revenue and expense:
  - April 22 actuals: $3,378,510 revenue/$1,843,939 expense

# of Staff: 13.5

Revenue Stream(s) the Unit Supports:

- Conference Services
- Continuing Education
- Contributed Revenue
- Membership
- Publishing
- Data, Research & Design

Status Report on Pivot Strategy, Aligned Unit Goals:

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

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

Although membership continues to lag behind pre-pandemic rates, as of the April financial report, PLA membership dues at $363,919, are about 17% ahead of the budgeted $311,667. This is evidence of the PLA National conference year “bump” in membership renewals.

PLA’s Web CE revenue lagged at $13,597 behind a budgeted $25,000. This is largely due to our decision to suspend production of new Web CE in order to focus diminished staff resources on PLA 2022 National Conference production, including the expanded Virtual Conference. New Web CE resumed production following the National Conference.

We feel the decision to focus on conference efforts paid off. A total of 6,005 librarians, exhibitors, speakers, guests, and others registered for PLA 2022, and the number of exhibitor representatives was 1,025. Additionally, our virtual conference participation was at an all-time high with 1,186 individual registrants.

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

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, reaches out to individual public library leaders experiencing attacks, and shares resources and information with allies in the field.
• As we move into FY23, a non-conference year for PLA, our focus will be on non-conference revenue streams. PLA will focus on member recruitment and retention, contributed income, CE, and data revenue streams. One exciting product developed in alignment with ALA’s pivot strategy of Data, Research, and Design, and in partnership with ACRL is Benchmark: Library Metrics and Trends. This is the newest tool for data-driven planning and advocacy in libraries, with free data access levels and more in-depth subscription levels. Survey results will also help PLA respond to requests for up-to-date, nationally valid data about staffing and diversity from public library staff.

• Related, one of our biggest opportunities is ongoing dissemination of the 2021 Public Library and Staff Diversity Survey report and findings. The survey collected data about staff salaries and hours, roles within the library, staff representation, hiring and retention strategies, and equity, diversity, and inclusion goals and activities. The survey is the second in a rotating series of three national surveys exploring public library roles, services, and resources to provide actionable data for decision-making and advocacy. Key findings include:
  - Virtually all (95%) public libraries report they engage in at least one type of EDI activity. More than a quarter (27%) of public libraries have formal EDI plans, and 25% report they have dedicated EDI staff roles.
  - “Traditional” library staff roles, such as youth and adult services, are the most common, but the prevalence of roles that incorporate social media and digital outreach (74%), workforce and small business development (18%), and social work (8%) illustrate a growing range of programs and services in public libraries.
  - In 2021 the median annual salary of a public library director reported was $79,022, and the median annual salary of a beginning librarian was $41,864. When viewed with historic PLA salary data, beginning librarian salaries have been virtually flat, and library director salaries have not recovered to pre-Great Recession levels.
  - More than a quarter (27%) of all public libraries report they lost staff positions in the prior 12 months. City (32.7%) and suburban (33.2%) libraries were slightly more likely to have lost staff positions than town/rural libraries (21.1%).
  - Staff demographics of the library sector do not reflect those of the U.S. population. Not all libraries or local governments, however, collect data on staff representation, and not all libraries were able to accurately report it. About 92% of libraries report using at least one strategy for hiring staff from underrepresented groups.

The report includes not only a summary of the data collected, but suggestions of possible starting points for action and additional resources that libraries may find helpful, such as the new Cultural Proficiencies for Racial Equity: A Framework and the Advocating for Better Salaries Toolkit.

PLA invited all U.S. public library administrative entities to complete the survey in fall/winter 2021. In total, 773 libraries completed the survey, a response rate of 8.4 percent. The survey results were weighted to account for differences between responding libraries and the universe of all U.S. public libraries.

# of Members (for Divisions): through most recent membership report: 8,568

# of Members/non-members/other stakeholders reached during quarter (for all Units): PLA: 10,409 – 8,568 (members) +1,295 (webinar registrants) +374 (PL magazine subscribers) + 172 (Digital Literacy Incentive applicants)

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

Since May, PLA has hosted seven webinars; five paid webinars, drawing over 430 registrants who attended live sessions on a range of topics including “Advancing Access for Library Customers with Sensory Needs” and “Providing Immigration Help with Community Partnerships;” as well as two free webinars attended drawing more than 380 registrants, on topics of Covid-19 Vaccinations for Children, and how to apply for the Digital Literacy Incentive funding opportunity.

The PLA Executive director has participated in IMLS Empowering Readers, Empowering Citizens dialogue with a number of stakeholders across library, community engagement and literacy fields, to inform and advance the agency’s future grantmaking and research agenda.

Describe the Most Impactful Unit Activities this Quarter:
• The Public Library Association (PLA) Strategic Plan 2022—2026 is now available on the PLA website, following its unanimous approval by the PLA Board of Directors in June 2022. Informed by member surveys, member and partner interviews, and PLA leadership and staff engagements, the PLA strategic plan centers Equity, Diversity, Inclusion, and Social Justice (EDISJ) and expands PLA’s role as a platform for innovation and amplifier for sharing public library community impacts.

• PLA published the 2021 Public Library Staff and Diversity Survey report in August. The national survey updates information on beginning librarian and library director salaries; documents traditional and emerging staff roles; explores staff diversity, recruitment, and retention efforts; and captures information about public library equity, diversity, and inclusion (EDI) goals and activities. The survey is the second in a rotating series of three national surveys exploring public library roles, services, and resources to provide actionable data for decision-making and advocacy.

• With over $1 million in contributions from AT&T, the Public Library Association (PLA) has selected 160 public libraries to host digital literacy workshops across the country. The PLA Digital Literacy Workshop Incentive, supported by AT&T, is designed to support public libraries in their efforts to boost digital skills for all members of their communities. DigitalLearn.org online courses and training materials were developed with and for library staff and their patrons. To date, funding from AT&T has contributed approximately $175,000 in ALA overhead. The complete list of libraries is available.

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

• Deploy the 2022 Public Library Services for Strong Communities Survey. All U.S. public libraries are eligible to complete this new survey to help us better understand how libraries are utilizing their unique programs, services, partnerships, and facilities in support of community needs. Additional information about the survey can be found in this document (PDF). It closes December 10, 2022. The ALA Executive Board is invited to promote this important survey widely!

• PLA staff will focus on strategies and tactics for its 2022-25 strategic plan implementation through a series of virtual and in-person planning discussions.

• Continue to monitor and close financials for the 2022 PLA National Conference as well as forthcoming 4 months of FY22 financials.

• On-board new committee members and provide EDISJ training to committees.

• Convene the PLA Board of Directors’ fall meeting in Chicago, in-person in October.

PUBLIC POLICY AND ADVOCACY

Unit Manager: Alan Inouye

Unit Budget:

• Budgeted revenue and expense:
• Actual revenue and expense:

# of Staff: 14.75 FTE

Revenue Stream(s) the Unit Supports:

☒ Conference Services
□ Continuing Education
Status Report on Pivot Strategy, Aligned Unit Goals:

- Provided 2+ sessions at ALA conferences (list)
  - Opening General Session speaker FCC Chairwoman Rosenworcel
  - Advocacy for Digital Books: Where are We and Where are We Going?
  - Sustaining Democracy Through Voter Engagement
  - Funding for Libraries: How to Advocate for Your Share
  - Library Outreach About COVID-19 Vaccines for Children
  - Unite Against Book Bans (co-led with OIF)
  - multiple Libraries Build Business sessions, including book release party (book published by ALA Editions)
  - L. Ray Patterson Award reception in honor of awardee ALA Past-President Jim Neal
- Increased coordination/collaboration with offices and divisions
  - ALA staff and committee members – hosted two receptions in D.C. office during conference
  - OIF – collaborate extensively on Unite Against Book Bans campaign
  - CMO – oversee comms consultants to support Banned Books Week and annual conference, including helping create ALA statements on issues, and for capacity in general
  - All ALA divisions – Submitted advocacy and initiative content for social media, blogs and other digital comms to divisions
- Produced policy briefs/reports to reflect ALA’s “let our legacy be justice” orientation
  - White paper: “Empowered by Reading: The Benefits of Giving Youth Access to a Wide Variety of Reading Materials”
- 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:
  - Mobilized grassroots for proposed library construction funding in 2023 appropriations bill
  - Working with House and Senate members on proposed new Tribal Connect Act
  - Convened a meeting of tribal library professionals and FCC staff on E-rate
  - Supported the introduced Digital Equity Foundations Act with Airwaves for Equity coalition
  - Promoted the memorandum of understanding between the FCC and IMLS

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

- Access to information (Unite Against Book Bans)
- Digital equity
- Library funding
- 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
- Midterm elections and contingency plans based on the outcomes

# of Members/non-members/other stakeholders reached during quarter:
PPA continues to reach a large amount of internal and external stakeholders, including:

- ALA members and leaders, reached via email and ALA Connect
- Scores of posts on PPA (@LibraryPolicy), ALA, ALA division (incl. AASL, ACRL, PLA, UFL, ILL) and coalition partner (Unite Against Book Bans, Banned Books Week) social media accounts and blogs
- Participants in PPA programming and committee meetings at Annual Conference
- House and Senate members and/or staff from offices on Capitol Hill
- Library associations of states involved in banned books and state e-books legislative campaigns
- Report release from LBB
- Coalition partners and government relations staff participating in select webinars on digital equity
- Library trade press and other media via press releases and direct outreach
- Work with members, other library professionals, ALA chapters on state/local issues and legislation
- Members of our national policy coalitions

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

It is a time of transition at PPA on multiple fronts. At least 4 major congressional champions (Reps. Levin & Meijer and Sens. Blunt and Collins) won’t be available to us because of lost primaries, retirement, or taking on a new role in Congress. Thus, PPA has a heightened focus on cultivating more congressional champions this fall and into 2023.

PPA’s role in the Association has also evolved, at least temporarily, because of an increased focus of the Unite Against Banned Books campaign, and turnover in the Communications and Marketing Office. Both PPA staff as well as our consultants have been diverted to this work to address urgent needs.

We’ve had significant internal transition with the departure of Kathi Kromer and transition to interim AED of Alan Inouye. Also, PPA has onboarded two new employees, Marleen Coleman and Chris Stewart, both filling vacancies. and has promoted Megan Janicki as deputy director, digital inclusion & broadband.

PPA looks forward to relative stability in the next few months leading up to a new Congress and state legislative sessions, as well as focus on library eligibility for the federal broadband funding from the National Telecommunications and Information Administration and continued emphasis on communications and advocacy on the Unite Against Book Bans campaign—and the myriad other issues and opportunities that we expect in advancing economic opportunity and equity and inclusion broadly.

Describe the Most Impactful Unit Activities this Quarter:

ALA conference sessions
- Unite Against Book Bans campaign
- Digital equity direct and grassroots advocacy

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

Minitex: Advocacy Academy – (Sept. 20 & 27)
- DPLA event (Sept. 27)
- West Virginia Library Association conference keynote (Oct. 5)
- Panel session at Joint Council of Libraries of Color conference (Oct. 5-9)
• Promotion of National Voter Registration Day and Unite Against Book Bans advocacy materials for outreach to political candidates leading up to the November elections (Sept.-Nov. 8)
• Post-election resources from Unite Against Book Bans and new Congress engagement (Nov.-Jan.)
• Committee on Legislation retreat in Washington, D.C. (Nov.)
• Policy Corps IV training workshop in Washington, D.C. (Nov.)

PUBLIC PROGRAMS OFFICE

Unit Manager: Melanie Welch

Unit Budget

- FY22 Budgeted revenue and expense: General Fund Admin: $186,474; Grants: $1,718,950; Overhead: $190,807
- FY22 Actual revenue and expense to date (as of April 2022): General Fund Admin: $6258; Grants: $1,568,513; Overhead: $187,495

# of Staff: 10 positions; 8 currently staffed plus a three-year term position to support the large LTC grant.

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.

PPO received a $223,812 from the Institute of Museum and Library Services for the next phase of Media Literacy Education in Libraries for Adult Audiences. This two-year project will support the creation of adult media literacy programming resources focused on how the often-overlooked structural parts of the internet affect the information people see and find online. The creation of these resources through this project will increase adults’ media literacy skills to empower them to make informed decisions based on accurate information they find online.

PPO collaborated with the Yiddish Book Center to promote Stories of Exile: Reading Groups for Public Libraries. Using Yiddish literature as a portal, participating libraries will host reading groups that explore narratives that grapple with questions of homelands, journeys, identity, and belonging. The project brought in $25,000 in support.

PPO received $213,546.00 from the National Endowment for the Humanities to support the implementation of two themes of our ongoing project, The Great Stories Club: Reading and Discussion for At-Risk Youth. It will include an application for grants to 100 libraries of all types. Selected grantees will receive a programming stipend, sets of books, and a suite of scholar-created materials for use with teenaged reading groups, on one of two themes, “Finding Your Voice” and “Deeper Than Our Skins.”

PPO submitted a $700,000 proposal to Capital One for the next phase of Community Connect. This will advance the work started in phase one of the initiative by continuing to support digital access, digital literacy, and financial capability in rural communities nationwide.
Describe the major issues, trends, opportunities, or concerns that your unit has or is responding to at the closing of this fiscal quarter:

PPO sees intellectual freedom concerns impacting the selection of program topics and is hearing from librarians who are anticipating how community members will react to certain programming themes. Staff are prepared to support libraries and work with OIF if challenges to PPO-funded projects arise. In response to this, PPO has proposed a LibLearnX session in partnership with the National Coalition for Dialogue & Deliberation that would provide libraries with de-escalation training to help them facilitate conversations and programs that may be tense or hostile.

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

- American Rescue Plan (ARP) project: 200 grant recipients continued spending $10,000 in grant funds to spur humanities activities nationwide and networked in ALA Connect.
- Let’s Talk About It (LTAI): Women’s Suffrage: 25 grant recipients continued hosting programming in their communities
- Thinking Money for Kids: 8 libraries hosted the exhibit and conducted related programming for children and families
- Hybrid Programming Series: 1,627 people have viewed the first four sessions of the NEH-funded free webinar series focused on hybrid library programming
- ProgrammingLibrarian.org: 64,354 unique users visited the website to access content about library programming

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 64,000 unique users visited ProgrammingLibrarian.org from June 1 to August 31, viewing more than 169,000 web pages. Recently, PPO has focused on publishing success stories from libraries that received American Rescue Plan: Humanities Grants for Libraries and blogs that feature recipients of the Libraries Transforming Communities: Focus on Small and Rural Libraries grants. Popular web articles this quarter have included a run-down of de-escalation techniques to use in tense library programming scenarios and an interview with a New Jersey Library about their sensory space. Readers were also interested in various program models such as the Community Art Swap and an outdoor book club. PPO’s popular Programming Librarian Facebook group had 25,955 members as of September 7.

Describe the Most Impactful Unit Activities this Quarter:

PPO had a robust presence at ALA’s 2022 annual conference in Washington, DC with the following workshops, sessions, meetings and events:

- World on the Move, A Traveling Exhibit About Migration Available for Libraries
- Humanities for One and All: Making Humanities Programs Inclusive and Relevant
- World on the Move: 250,000 Years of Human Migration reception
- Libraries Transforming Communities: Focus on Small and Rural Libraries reception
- How to Apply: ALA Grant Proposal Writing Tips for Small and Rural Libraries
- STEAM Equity: Gender Equitable STEAM Programming pre-conference workshop
- Public and Cultural Programs Advisory Committee in person meeting
- Financial Literacy Interest Group annual meeting

Select Future Activities and Events Through End of Next Fiscal Quarter:
● The 25 selected sites for *Let’s Talk About It: Women’s Suffrage* will continue implementing scholar-led reading and discussion programs using [theme materials](#) until September 2022.

● The *Libraries Transforming Communities: Accessible Small and Rural Communities* grant applications will be created with input from project advisors through the next fiscal quarter. The grant application is scheduled to launch in November 2022.

● Beginning in September the *Great Stories Club: Reading and Discussion for At-Risk Youth* will kick off. The first part of the project will be project scholars updating the suite of materials for two series themes and beginning creation of an application.

● In October applications will open for the *World on the Move* exhibition project. Fifteen public libraries will be selected to host the exhibit and hold programs related to the exhibit’s themes.

● Beginning in September, the *Media Literacy Education in Libraries for Adult Audiences* project will kick off. The first part of the initiative will be creating an RFP for people to apply to be an advisor on the project.

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**Publishing & Media**

*Unit Manager:* Mary Mackay

*Unit Budget:*

- Budgeted FY22 Revenue $9,343,937/ Overhead $2,476,143/ Total Expenses $9,162,042/ Net $181,895
- Actual revenue and expense through April 30: Revenue $6,100,800 (-2%)/ Expense $5,150,443 (-14%)/ (Net $950,357—high number due to expenses yet to be processed)

*# of Staff:* 43

*Revenue Stream(s) the Unit Supports:*

- ☒ Membership
- ☒ Publishing and Media

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

- Revenue: At the end of April, revenues for the department as a whole were 2% below budget, projected to be approximately 3% below by the end of FY22, with expenses projected to be 4.5% below budget, for a projected net improvement of $133,639.

- Increasing EDISJ engagement and amplifying “Let Our Legacy Be Justice.” Published content and initiatives include recent and forthcoming publications such as *Power Lines: Connecting with Teens in Urban Areas Through Media Literacy; Cultural Humility; Narratives of (Dis)Enfranchisement,* and *Narratives of (Dis)Engagement*; trend stories in the May issue of *American Libraries* on antiracist storytimes, period equity, and accessibility collections for young patrons, as well as a PLA webinar excerpt on boosting youth workforce preparedness and an interview with challenged book author Mariko Tamaki; an article by trans author Kyle Lukoff in the June *Booklist Reader*; and an updated two-page summary with an introduction by ODLOS of EDISJ-related titles in the ALA Editions/ALA Neal-Schuman catalog.

- Extending markets beyond libraries and beyond the US/ repackaging and repurposing content to reach and serve targeted audiences both within and beyond the library field: *Booklist Reader,* the monthly publication (currently digital-only, with print planned to launch in January 2023 for wider accessibility) offers selected
Booklist content highlighting diverse voices and books to the patron audience. ALA Editions/ALA Neal-Schuman has seen an uptick in incremental revenue from translations and new distribution channels for digital content such as Gale/Cengage and continues to grow the partnership with trade publisher (public-facing) Sourcebooks—several new projects in progress include a 2023-2024 reading planner, following the success of the 2022-2023 planner. RDA: Resource Description and Access, an important building block in ALA’s international presence and participation, continues to address global regional needs and to work with international translation partners, including for Arabic and Portuguese languages. ALA Graphics continues to see sales growth on Graphics Spreadshirt Giftshop which reaches a general public customer base in addition to ALA’s regular markets, with Unite Against Book Bans and Banned Books merchandise proving especially popular. Graphics continues to cultivate the licensing relationship with Out of Print Clothing, which also reaches a public audience, and expects to negotiate at least two more licenses in 2023.

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

- The high number of open jobs led to 46% above-budget results for ALA JobLIST, a joint project between American Libraries and ACRL, with HRDR. (More staff time is required for processing increased ads.)
- The global shortage of paper pulp as many paper mills transition to packaging materials continues to disrupt the publishing industry with long delays, sudden price jumps, and substituted grades of paper. These supply-and-demand disruptions lead to higher costs and longer-than-usual print times, impacting budget and delivery of magazines, books, and catalogs. Postage rates are also increasing steeply. We continue to adjust print runs and paper, negotiate costs where possible, and work with our printers on best practices. ALA Editions/Neal-Schuman FY23 eBook sales and fulfillment and print-on-demand options will be more streamlined and efficient as we learn more about the capabilities of CDC’s BiblioVault system.
- Units continue to focus on licensing opportunities and new channels for generating incremental revenue from digital platforms. Editions/Neal-Schuman is receiving royalties from Gale/Cengage from purchases of single chapters and collection content bundles that allow for building topic collections. The Booklist agreement with Zinio, a company that hosts digital magazine content on Overdrive, Scribd, Amazon and other services, helps expand reach and build new audiences for Booklist, Book Links, and Booklist Reader. Zinio metrics are included in the quarterly Booklist data (below) and Booklist receives incremental royalties based on usage.
- Larger group conferences, workshops, events, and gatherings where we can capitalize on the need for multiple copies of books and other materials are resuming more consistently.
- There is a clear ongoing need and demand for resources related to EDISJ and the increase in book bans and challenges (special promotions highlighting resources to help counter book bans are examples of Publishing & Media offering information in a timely way). AL articles highlighting intellectual freedom-related issues include an interview with Maus author Art Spiegelman, a column by then-ALA President Patty Wong about ALA’s longstanding fight for the right to read and the Unite Against Book Bans campaign, an upcoming cover story about book challenges, and an online interview with frequently challenged author and Banned Books Week honorary chair George M. Johnson. Q3 top-selling books point right at the issues facing libraries including intellectual freedom, trauma, and race. Banned Books Week designs (both new and backlist) were the best sellers of Q4 for ALA Graphics, with two Unite Against Book Bans designs also proving popular.
- Library of Congress and the Program for Cooperative Cataloging will roll out guidance and policy statements for use with the revised RDA: Resource Description and Access standard later in 2022 or early in 2023. This new guidance, along with similar works from the British Library and the Deutsche Nationalbibliothek, should spur other cataloging institutions to plan their own transitions to new RDA.
- Major publishers (critical sources of revenue for advertising and sponsorship for Booklist) have found creative ways to build their own digital audiences through the pandemic and are less dependent on ALA channels to reach librarians. Face-to-face events are important for offering something they can’t easily replace themselves.
# of Members/non-members/other stakeholders reached during quarter:

**Booklist Q4 FY22**
- 7,714 avg. print subscribers (+478 from Q3)
- 5,361 avg opens for BOL-hosted digital editions (+545 from Q3)
- 1,559 avg opens for Zinio/Overdrive-hosted digital editions (-909 from Q3)
- 78 institutional digital subscriptions (+1 from Q3)
- 247,283 enewsletter subscriptions (-17 from Q3; top list 95.4K)
- 5,529 active profiles, Booklist Online (-80 from Q3)
- 45,100 Twitter followers (+600 from Q3)
- 16,442 Facebook page follows; (slightly down from Q3)
- YouTube channel subscribers: 501 (+28 from Q3)
- 1,065 LinkedIn followers (+226 from Q3)
- Q4 Podcasts: 1,903 listens for 4 podcasts (both Shelf Care and Shelf Care Interview). FY22 cumulative: 7,945 listens for 14 podcasts
- Q4 webinars: 16,902 registrants for 16 webinars. FY22 cumulative 82,289 registrants for 74 webinars.

**ALA Editions/ALA Neal Schuman Q4 FY22**
- 38,812 Fall/Winter 2023 catalogs mailed
- 3,291 orders (+464 from Q3); 20,153 net units purchased (+3,377 from Q3)

**ALA Graphics Q4 FY22**
- 60,000 catalogs mailed (+2,854 from Q3)
- 1,869 orders (+414 from Q3); 10,411 net units purchased (+902 from Q3)

**ALA Store Q4 FY22**
- 156,975 sessions (-12,198 from Q3)
  - Note: Unique sessions stats not available in Google Analytics
- 366,381 unique pageviews (-135,222 from Q3)
- Users spend an average of 1:59 minutes per visit to the store (about the same as Q3)
- 41.3% of users find the store via organic search; 32.9% of users find the store via direct link; 19.1% of users find the store via referrals from other sites (48.65% from ala.org); 5.2% of users find the store via social media; very similar ratios to Q3

**Digital Reference/RDA Q4 FY22**
- 2,336 Toolkit subscribers (+54 from Q3)
- 9,115 users (+646 from Q3)
- 1,560 RDA-L email subscribers (+18 from Q3)
- 1,577 subscribers to RDA Toolkit YouTube Channel (+45 from Q3)

**American Libraries and AL Direct Q4 FY22**
- 47,854 recipients AL print (June) (+1,746 from Q3)
- 13,547 opens to AL digital-only issue (July/August)
- 31,664 average recipients weekly AL Direct (-672 from Q3)
- 10,808 podcast listens (FY22 cumulative = 54,426)
- 97,791 Twitter followers (+732 from Q3); 20,778 Facebook page followers (+3,075 from Q3)

**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 don’t share customer data. Some orders are placed by accounting/ administrative departments of institutions that may be ordering for members but don’t use member numbers to apply for discounts. Webinar attendance for sponsored webinars (Booklist and AL Live) remains strong. One pressing 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 Q4
- Published a total of 10 book projects, for an FY22 cumulative total of 44, plus 12-14 Facet (CILIP, UK) titles.
- The Fall/Winter 2023 catalog, which included an updated EDISJ spread, mailed in late August to approximately 39,000 customers and prospects.
- 11 early literacy titles were shipped to ~150 military bases as part of a large bulk order booked in July.
- 42 new and topical ALA Editions/Neal-Schuman and Facet titles were showcased at Annual Conference, with net book sales just over $6,000. This represents a new approach to conference sales, given ongoing online ordering practices and less pent-up demand. Related conference expenses have been significantly reduced.
- ALA Editions will be publishing the first revision in 30 years of standards that govern libraries in carceral settings. Much of this work is funded by a Mellon grant and is being co-developed with a member working group, which met at ALA Annual in Washington, D.C. (The revision will publish in FY23.)

Booklist Q4
- Advertising revenues were strong through Q4 and will end the year above budget; however, subscriptions continue to face industry pressure. Below-budget expenses mean the unit expects to end FY22 on target.
- Booklist’s webinar program continues to outperform projections, and topics related to book bans and book challenges are increasingly popular and well attended.
- A survey to potential subscribers about Booklist Reader for library patrons revealed strong early interest in a print version, and the sample print issues shared at both the PLA and Annual conferences received much positive feedback.
- Operational changes for Booklist include restructuring the marketing team—two editorial assistants moved to marketing and Booklist hired two new editorial assistants. Some production work moved to the Production Services team, avoiding replacing a full position.

American Libraries Q4
- Classified ad revenue for JobLIST, managed in collaboration with ACRL, brought in almost $129,000/unit in sales in Q4. Total receipts in FY22 totaled $992,660—nearly $430,000 (or 76%) greater than FY21. Given the hot job market, FY22 was a record-breaking year, beating the previous best ($860,750 in FY17) by more than 15%.
- The June issue of American Libraries featured the return to an in-person Annual Conference after three years, as well as stories about the 100th anniversary of the Newbery Medal, the Great Resignation, library jobs on the rise, and an interview with challenged book author Art Spiegelman.
- 37 online stories about the 2022 Annual Conference were posted, including 30 posts covering conference programs and speakers. The July/August issue included a conference wrap-up, a feature on ALA Presidential Citations award recipients, and an interview with author and Annual Conference speaker Celeste Ng.
- Posted a Letters of the Law column about materials challenges in the library.
- Covered the Association of Jewish Libraries Conference in July.
• Aired three episodes of the *Call Number with American Libraries* podcast, including a conversation with D.C. locals like Librarian of Congress Carla Hayden (June), past Newbery winners like Jerry Craft and Lois Lowry (July), and those supporting Ukraine’s libraries, including information about donating to ALA’s Ukraine Library Relief Fund (August).

**Digital Reference/RDA Q4**

• Salesforce-reported revenue through August is $1,076,329, less than 2% short of budget projections for the year. The growth in revenue is largely due to price increases.
• The new Admin site was rolled out in July, providing Toolkit users with usage data and bringing the RDA Toolkit site migration to completion.

**ALA Graphics Q4**

• The number of orders in FY22 grew 156% over FY21 sales. ALA Graphics revenue surpassed budget targets each month of Q4, helped in part by a significant military order in August. Q4 bookmark sales increased by 22% over Q3 with 1,233 more packs sold. ALA Graphics and ALA Editions/ALA Neal-Schuman held a successful Annual Conference Store with a modest footprint on the exhibit floor which provided insight on future changes to size and layout to keep costs and revenue in balance.
• The Fall 2022 catalog featured two new celebrity READ posters of Idina Menzel and Tacko Fall, and two new character READ posters of Marcel the Shell With Shoes On and Read Creepy Tales featuring art by Caldecott Honor-winner Peter Brown.
• Two new partners were added to Graphics Spreadshirt Giftshop: Choice and award-winning graphic novelist Nate Powell whose illustration on the importance of reading comics, originally created for Booklist, was repurposed as a print-on-demand poster. Banned Books Week designs (both new and backlist) were the best sellers of Q4, with Unite Against Book Bans designs also proving popular.
• Baby Yoda library card licenses continue at a steady pace, including reprints and new orders in Q4.
• The success of a *LeVar Burton READ t-shirt* launched in Q3 with licensing partner Out of Print has resulted in expansion of the line, with a long sleeve t-shirt to be added in fall 2022.
• Stronger than anticipated sales of Library Card Sign-up Month products featuring Loud Mouse resulted in a quick August reprint to fulfill orders.

**Select Future Activities and Events Through Q1, FY23:**

• Books published in FY23, Q1 will include *The Ultimate Privacy Field Guide* with the Office for Intellectual Freedom; *Foundations of Intellectual Freedom*, a new textbook by Dr. Emily J. M. Knox; and *25 Ready-to-Use Sustainable Living Programs for Libraries*. Two targeted catalogs mailed in early September—Resources for Academic Librarians and Textbooks and Course Resources. A new journal in collaboration with Sourcebooks, *Read These Banned Books*, published in time for Banned Books Week, with a portion of their direct sales donated to Unite Against Book Bans. With ALA Graphics, ALA Editions/Neal-Schuman will have a presence at JCLC in October, showcasing the newest EDISJ resources.
• *Booklist* continues to investigate digital options for greater reach and incremental revenue. *Booklist Reader*, launched as a digital product in September 2021 will launch a printed version in January 2023. This option will be available only to Booklist subscribers, in an effort to boost subscriptions and address the general industry-wide downturn.
• Editorially, *Booklist*’s plans for major changes in FY23 including moving the Editors’ Choice issue, which has traditionally published in January, into a combined issue in December that will feature Editors’ Choice and *Booklist*’s popular starred reviews issue. The December double-issue will thus look back on key works published in the 2022 calendar year. The January 2023 issue will focus on Readers’ Advisory and look forward into the 2023 calendar year and will align well with the LLX conference and with the launch of *Booklist Reader* in print.
• READ® Star Wars product with licensing partner Out of Print will release in Target stores on September 27, 2022. Expected products include a magnetic bookmark set, Grogu Note Cube, and Grogu and Princess Leia journals.
• Baby Yoda library cards have generated requests for ALA Graphics to provide more card designs. After developing a new, streamlined process for licensing and downloadable art, Graphics launched its first new design in early September 2022.
• The September/October issue of American Libraries includes the annual Library Design Showcase (cover story), an interview with acclaimed author George Saunders, and a recurring feature looking at ALA Award recipients. The September episode of Call Number with American Libraries focuses on library design solutions for accessibility and disaster recovery, and the October episode returns with the perennial favorite Halloween theme. The November/December cover story will profile several book challenges and library responses throughout the country, as well as an interview with journalist Nina Totenberg. For Banned Books Weeks, American Libraries will post an online interview with BBW honorary chair and frequently challenged author George M. Johnson.
• Working with a new ad sales rep, American Libraries is anticipating dynamic innovations in approaches to advertising, laying good groundwork for growth.
• The Digital Reference (RDA) team will focus on September and December releases, continued orientation efforts to customers to prepare them for transition to the revised standard, publication of 5 new translations of the revised RDA in 2023, and negotiating a Spanish translation agreement expected to be in place before the close of FY23. Ancillary revenue-generating projects include eCourses, webinars, and related book publications. In-person international group meetings are expected to resume in FY23.

REFERENCE AND USER SERVICES ASSOCIATION (RUSA)

Unit Manager: Bill Ladewski

Unit Budget:

- Budgeted revenue and expense: $220,500/$194,563
- Actual revenue and expense: $216,983/$145,697

# of Staff: 1.8 (One staff member 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.

With the most recent membership numbers provided through March, RUSA had 2,576 members. This represents an increase of 28 members so far in this current membership year, or 1% growth. RUSA Section membership has also increased for each Section so far in this membership year. The largest membership growth has occurred in RUSA Sections CODES and STARS, each having increased over 4% so far this membership year.
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.

Through August, RUSA’s completed CE programs have consisted of 14 e-courses and 11 webinars, with total combined attendance of over 700 participants. Financially through April, RUSA’s CE revenue totaled $81,038 against a budget of $67,200 which represented a 21% positive variance to budget.

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

- **RUSA Finances**: RUSA is projecting to end the 2022 fiscal year in the black. This will be the first positive financial year for RUSA in many years. Also, the most recent budget submitted for fiscal year 2023 will also show a profit. RUSA began a three-year pivot strategy beginning in 2020 to stabilize its finances to help secure its long-term viability. These positive financial results for FY22 and the submitted budget for FY23 show the progress RUSA has made with implementing cost savings and revenue growth strategies as part of its overall pivot strategy.

- **RUSA Membership**: RUSA has seen membership growth so far in this membership year. Membership has grown overall for RUSA by approximately 1%, and all six of RUSA’s Sections have also experienced membership growth this year. This represents a positive change and hopefully an end from the nearly 10-year decline RUSA has experienced in its membership.

- **RUSA staffing**: RUSA is down 1 FTE from the start of the 2022 fiscal year. At our current staffing level of 1.8 FTE’s, we are closely monitoring what our workload capacity is and adjusting as necessary. Our focus now is to support our main revenue areas which are our Continuing Education and Membership. Support in areas such as awards and website management have decreased. RUSA anticipates remaining at 1.8 FTEs for the time being. We may have an opportunity to add staff of .5 FTE at some point in FY23. This .5 FTE staff position has been included in the FY23 budget.

# of Members: 2,576 as of March 2022

# of Members/non-members/other stakeholders reached during quarter: Approximately 50,000 through association wide promotion of our Continuing Education programs and Town Halls.

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

RUSA has continued to maintain a full CE calendar and is on pace to meet budget expectations for FY22. RUSA’s membership, with March reporting numbers, has shown a growth of 28 members so far this membership year. All RUSA’s Sections have also seen growth in membership in this membership year.

- **RUSA Continuing Education**: Through the 4Q of FY22, RUSA CE has presented 14 courses and 11 webinars totaling over 700 participants. Additional confirmed upcoming CE programing consist of 1 e-course and 2 webinars.

- **RUSA Achievement Awards Virtual Ceremony**: RUSA hosted a virtual award ceremony on July 21st for its annual Achievement Awards. Over 80 people attended the 1-hour ceremony where the winners of the 17 different achievement awards were celebrated and given the opportunity to offer comments.

- **Coffee and Conversation with RUSA**: This event held at the Annual Conference was promoted as an opportunity for RUSA members and non-members to come and informally engage with each other and learn about opportunities for involvement within RUSA. Current RUSA leaders were available to share their personal
experiences in RUSA and to answer questions. The event attracted a standing room audience and is now being planned for holding again at Annual 2023.

Describe the Most Impactful Unit Activities this Quarter:

- **RUSA at Annual Conference:** RUSA had a very successful 2023 Annual Conference, hosting 38 total meetings and programs. Each was very well attended and highly productive. There was a lot of excitement amongst RUSA members at Annual due to the fact of being in-person again.

- **Guidelines for Behavioral Performance of Reference and Information Service Providers update:** A Town Hall program hosted by the behavioral guidelines task force was held in July to solicit feedback on the suggested updates. The primary focus of these updates was the incorporation of inclusion, diversity, equity, and accessibility; in particular, advocating for the addition of an Inclusion section. The task force wanted to make sure everyone had a voice in this effort. Additional changes include a new introductory preface and updating the treatment of virtual and face-to-face interactions to reflect current practices and technology.

- **RUSA Membership and Retention Task Force:** A RUSA Task Force on Membership and Retention surveyed RUSA members and non-members to better understand what members find valuable about the Division as well as understanding why other members of the profession turn their attention to other Divisions or organizations. The Task Force report highlighted goals to pursue for membership which included: 1. Focus on new members, including student members, to better understand how RUSA can help them achieve their professional goals. 2. Continue to look for ways to provide quality programming to RUSA members and to learn more about the types of programming our members would like to see. And 3. Improve communication among RUSA members and beyond.

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

- **RUSA Publications Task Force:** In April 2021, a Task Force was charged to review and assess the current RUSA publications program which encompasses communication regarding section and division activities (e.g., RUSA Quarterly Report, RUSA Update, eNewsletter) as well as peer-reviewed or edited publications contributing to the literature of reference and user services (e.g., RUSQ, RUSA Voices blog). The Task Force’s final report was submitted to the Board and an overview of the report was presented at the August 9th RUSA Board meeting. The Board will have an in-depth discussion about the recommendations at its October meeting (October 11th, 12-1:30 CT). RUSA is encouraging input from membership regarding the Task Force’s recommendations and is currently collecting feedback through an online form.

- **Fall 2022 Online Learning with RUSA:** RUSA continues to offer an outstanding combination of repeat and new courses/webinars. Upcoming programming includes: “Marketing the 21st Century Library”, a four-week asynchronous course beginning on Monday, September 12, 2022, “Ensuring Accessibility in Discovery: EEAAP forms and Alternative Access”, a 90-minute live webinar scheduled for Wednesday, September 21, 2022, and “Reference Interview 101”, a six-week asynchronous course beginning on Monday October 3, 2022.

**UNITED FOR LIBRARIES**

**Unit Manager:** Beth Nawalinski
Unit Budget: (4/30/22)

- Budgeted revenue and expense $207,067/$254,504
- Actual revenue and expense $152,446/$169,811

# of Staff: 2.8 (0.8 unfilled)

Revenue Stream(s) the Unit Supports:

☒ Continuing Education
☒ Contributed Revenue
☒ Membership

Status Report on Pivot Strategy, Aligned Unit Goals:

FY22-23 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.

- Self-join option was sunset via board action in May 2022. Groups with expirations through October were offered the opportunity to renew once as a self-join group.
- Conversion of self-join groups began 9/1/22 with the November expirations.
- MRS and United are sharing a first-year incentive to encourage opt-in to membership with a goal of one personal membership opt-in per current self-join group.
- A training only option launched 9/1/22.
- United is carefully tracking conversion, including reasons for not converting.

FY22-23 Goal 2: Host second annual virtual event with revenue goal of $10,000.

- Goal completed in fourth quarter of FY21 with more than $26,000 in revenue (registration and sponsorship).
- 2022 Virtual event revenue = $30,558, an increase of approximately 17% over 2021.
- In the nine (9) states that purchased statewide registration, revenue was $3,790 in 2021, $18,415 in 2022, which is an increase of $14,625 in those states (MA, MI, MS, MT, ND, NE, ND, OR, VA). States have already asked for the statewide registration option to continue for 2023.


- Statewide All Access Partners: MA, MD, MI, MT, ND, NE, NH, OR, SC, SD, TX, VA
- Statewide Training (varies by state): AK, AL, IL, MS (new), MO (new), N

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

Intellectual Freedom and book challenges continued to be the most prominent area of work. Additionally United is updating and expanding our core Trustee training, wrapping up the development of new advocacy training, and completing a review of all current resources and training.

Pre-Conference: More than 100 individuals attended, The ABC’s of Preserving Intellectual Freedom - Anticipating, Bridging and Conversing: How to Help Protect Your Library. The pre-conference was made possible by the Jack Neal bequest to United for Libraires. A training and resources toolkit is in final production in partnership with our consultants Robyn L. Stein (President, Robyn L. Stein Group (RLSG)), and Cara Taback (Founder/President Cantata Communications). The toolkit, which will launch in late 2022, will be included in some statewide access packages, free for United for Libraries personal members, and will be available for standalone purchase.
Short Takes for Trustees: This training series, launched in 2017, is our most popular and utilized training series. Updated videos and new topics (recorded during 2022 ALA Annual) begin rollout in late September, including videos on intellectual freedom and EDI. The training series is included in statewide access and available for standalone purchase.

Making the Case for Your Library: Creating Board & Community Champions: Designed to help boards integrate a culture of ongoing advocacy and public awareness, this new series is launching fall 2022. Modeled after Short Takes for Trustees, each of the four (4) videos is approximately five (5) minutes in length and includes an activity and a resource guide. The series will be included in some statewide access packages, free for United for Libraries personal members, and will be available for standalone purchase.

# of Members (for Divisions): 4,293 (as of April 2022)

# of Members/non-members/other stakeholders reached during quarter: 20,000+

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

Statewide Partnerships

Through our statewide training partnerships, United connects with libraries in the following states: AK, AL, IL, MA, MD, MI, MT, ND, NE, NH, NJ, OR, SC, SD, TX, and VA. This includes all library directors/staff, Trustees/board members, Friends Groups, and Foundations in those states associated with 5,697 outlets as defined in the 2019 PLDS. United connects with these individuals through our eNewsletter (20,000+ individuals), social media, our new blog, the United website, and listservs hosted by each of our statewide partners.

4th Quarter United for Libraries Learning Live (monthly members only webinars):

• June 14, 2022 - Friends of the Library & Book Sales: Branch Sales, Online Stores, and More
• July 12, 2022 - Gift Acceptance Policies through a Diversity, Equity, and Inclusion Lens
• August – not held due to virtual event

Describe the Most Impactful Unit Activities this Quarter:

2022 ALA Annual Conference – United for Libraries hosted the following during the annual conference, with full descriptions available here:

• (1) Pre-Conference: The ABC’s of Preserving Intellectual Freedom - Anticipating, Bridging and Conversing: How to Help Protect Your Library
• (2) Ticketed Events with our publishing partners
• (4) Author panels with our publishing partners
• (7) educational programs
• (1) President’s Program
• (2) discussion groups

2022 United for Libraries Virtual – United held its third annual virtual conference for Trustees, Friends, Foundations, and the staff that work with them. More than 1,000 individuals registered prior to the event held August 9-11, 2022. Nine state libraries purchased statewide registration, which includes on-demand access. The three-day interactive event was sponsored by Penguin Random House, Baker & Taylor, and Carl Bloom Associates.

United partnered with Booklist, ALA Editions, and ALA Graphics to highlight products and services, including a four-minute video about Booklist’s new product, Booklist Reader in Print.

A full description of all programs available here. Highlights included:
• Intellectual Freedom Challenges: How to Strengthen Your Library's Response
• Diversity in Library Boards, Friend Groups, and Foundations: Successes and Struggles in Recruiting and Retaining Diverse Members (presented by the United for Libraries 2022 Emerging Leaders Team)
• (Keynote 1) Library Workers are NOT Okay: How Trustees, Friends & Foundations Can Support the Health & Well-Being of Library Staff
• (Keynote 2) Libraries, Trustees, Friends, Foundations, and the DEI Revolution with James O. Rodgers and Laura L. Kangas

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

BoardSource Member Benefits – United will host several virtual information sessions highlighting the BoardSource member benefits now available to all United for Libraries personal members. To add United for Libraries to your personal ALA membership, click here.

United for Libraries Office Hours – United will launch weekly “office hours” via Zoom on Thursdays from 12:00-1:00 pm Eastern beginning October 6.


Emerging Leaders Projects – United will sponsor eight (8) Emerging Leaders for 2023 focused on two projects:

• Library Trustees/Board Members, Friends groups, and Foundations have a key role in advocating for their libraries. This project will entail an environmental scan to determine best practices of statewide organizations. An analysis will be conducted to determine what resources United can provide to statewide organizations to ensure their success in engaging and empowering their Trustees/Friends/Foundations to advocate.

• Few MLIS/MLS programs provide education in library advocacy and best practices in how public library directors/staff work with library Trustees/boards, Friends groups, and/or Foundations. This project will present research on what training MLIS/MLS programs are currently offering in this area, what the needs are as far as curriculum and content, and what opportunities United has to help provide this content. In addition, it will examine how MLS/MLIS students can be engaged with United, so they are equipped throughout their careers with resources on how to work with Trustees/boards, Friends groups, and/or Foundations.

YOUNG ADULT LIBRARY SERVICES ASSOCIATION (YALSA)

Unit Manager: LaMoya N Burks

Unit Budget:

• Budgeted revenue and expense $581,927 / $326,927
• Actual revenue and expense $326,947 / $365,144

# 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:

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

Staff and YALSA Board of Directors are working collectively to use the pivot strategy to drive implementation of survey results, marketing strategies, membership continuing education opportunities, and meeting/convening priorities. Cross divisional and departmental meetings have led to addressing gaps of communication in addressing how to best invite new membership, stability of current membership, brand appearance, and remaining resourceful for communities through systems thinking for best outcomes. YALSA is presently working to present customer service driven outcomes in returning active and prospective member and partnering personalized phone calls and letters, lapsed member postcards, as well individual and batched email threads. The Division aims to make verbal and technological supported feedback within 24-48 hours. A system design to ensure quality answers for inquiries are solution based. The system includes a team effort for YALSA staff to meet monthly to provide updates, create and maintain cross training opportunities, track progress, and plan future development. The inclusion strategies to understand roles of each team member better assist in customer service. However, YALSA does need additional staff members to contribute to the leadership role(s) of Communication. There is an opportunity to consider adding a communication specialist to provide skills necessary to fulfill technology priorities such as communicating on social media platforms and providing website development skills. Moreover, the need for a Communications Specialist contributes to the gap areas necessary to address revenue driven strategies to achieve greater success for YALSA.

# of Members (for Divisions): 3404 members

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

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<th></th>
<th>2022</th>
<th>2021</th>
<th>Percent of Change</th>
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<tr>
<td></td>
<td>3,404</td>
<td>3,497</td>
<td>-2.66%</td>
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YALSA has strategically worked to influence membership renewals with marketing techniques, such as for the month of May 2022 all lapse YALSA members still active with ALA received a postcard. The YALSA Board welcoming committee, Division Membership Promotion Committee, led our unit to draft and send out correspondence such as welcome letters with resource links electronically to all new members.

Daily interaction to encourage potential committee members, staff availability by phone, email, and virtual assistance, social media presence, focus groups, membership meetings, and conference attendance all contribute to the growth of YALSAs membership increase. The YALSA Membership Coordinator and Interim Executive Director continue to gather
potential membership lists ranging from individual to corporate through local, regional, and state affiliates. Member of the Month spotlights community engagement and raises awareness of member benefits. The Division works each day to increase numbers by working collaboratively together as a team internally to influence our stakeholders, Board members, and communities to do the same and even better. Checkpoints to evaluate progress are recorded and placed in a shared YALSA staff workplace for ongoing teambuilding methods.

**Continuing Education statistics are noted below:**

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<thead>
<tr>
<th>Date</th>
<th>Title</th>
<th>Participants</th>
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<tbody>
<tr>
<td>Jul-22</td>
<td>e-Course - A Place to Belong: Supporting Neurodiversity and Mental Health</td>
<td>29, 29, 29</td>
</tr>
<tr>
<td>9-Jun-22</td>
<td>The Library's Role in Developing Healthy Habits</td>
<td>10, 5, 19, 34</td>
</tr>
<tr>
<td>12-May-22</td>
<td>Beyond the Newsstand</td>
<td>15, 11, 15, 35</td>
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Emails were sent to new members welcoming them to YALSA on May 23, 2022. 63% opened the email as of September 21, 2022. (* YALSA Staff was not able to retrieve monthly tracking data for new member email due to ALA technology challenges with iMIS*)  

*Please see attached statistics report for the months of July 2022 and August 2022 for social media/email*

**E-News Stats - August 2022**

- Average Open Rate for August: 39.6%
- Average Unopened rate for August: 60.2%
- Clickrate Average for August: 6.9% (benchmark is 13.2%)
- 0 Unsubscribes

**E-Blast Stats - July**

- Average Open Rate for July: 41.2%
- Average Unopened rate for July: 57.7%
- Clickrate Average for July: 4%
- 3 Unsubscribes - is this to also opt out of e-news?

- Will review accounts that emails have bounced, those emails are either incorrect or inactive
- Possibly incorporate different graphics or more for clicks, strategize placing of links as well
YALSA Symposium will be held Nov. 4-6th at the Renaissance Baltimore Harborplace Hotel in Baltimore, MD
- Symposium 2022 early registration numbers present a total of 307 registrants during early registration. The attendance goal is 471 paid attendees.

Future Activities:

- Cost supported Continuing Education session projected August 2022
- Teen Tober theme “Love what you do & Do what you love in your library” ; YALSA is currently working with the ALA Store to create merchandise (on demand) for the public to purchase
- Member meeting to convene for the quarter September 29, 2022.
- Symposium 2022 will convene in Baltimore, Maryland
- Member testimonial videos will be confirmed to place on the YALSA website and other platforms
- An official sponsorship list and levels to present on YALSA website to extend beyond conference(s)
- YALSA Board leadership will align committee appointments, duties and responsibilities to align with strategic plan and member recruitment and retention through a temporary structure to review appointments, to also include Conference committee
- YALSA and ALA Continuing Education to collaborate on fee-based offerings – YALSA Education Advancement committee as contributors to ensure member engagement as volunteers
- YALSA Member of the Month continues – a total of five between September 2022 and December 2022 highlights include YALSA website and other Division communication channels
- YALSA Co-Editor interviews for YALS and JRYLA vacancies

- Teens Top Ten nominees were announced April 8, 2022 through press release via the YALSA web page; Teens Top Ten contest continues, and winners announced by next quarter

YALSA Membership Meeting on September 29th.
YALSA TeenTober apparel and Toolkit available on the website

YALSA Member of the Month