

## Joint Board & Budget and Finance Committee Meeting

Midwinter 2019 Seattle

Monday, January 28, 2019, 8:00–10:00 a.m.

Grand Hyatt Seattle, Leonesa III

### Agenda

Time	Agenda Item
8:00–8:05 a.m.	<b>1.0 Welcome and Introductions (Henderson Allen)</b>
8:05–8:45 a.m. <i>Information</i>	<b>2.0 Update on CHOICE initiatives (Cummings)</b> CHOICE Editor & Publisher Mark Cummings will give a progress report on Choice initiatives.
8:45–9:20 a.m. <i>Information/Discussion</i>	<b>3.0 ALA Organizational Effectiveness (Daly/Henderson Allen/Davis) #A, #B, #C, #G, #G1, #G2</b> The group will receive an update on ALA Organizational Effectiveness and will discuss how ACRL might respond to potential changes, such as changing the financial parameters under which ALA and its divisions function, and how changes might affect Choice. The group will convey any feedback to ACRL's task force member Emily Daly.
9:20–9:40 a.m. <i>Discussion</i>	<b>4.0 Future of ALA Midwinter (Henderson Allen/Pressley) #D, #E</b> The group will review plans for the future of ALA Midwinter and will discuss how it would like to participate in the future.
9:40–9:50 a.m. <i>Information</i>	<b>5.0 Membership Report (Petrowski) #F</b> The group will receive an updated membership report from ACRL Associate Director Mary Jane Petrowski. Petrowski will share updates on the community college marketing plan, personas, impact of the \$5 student dues rate, and projections for membership trends.
9:50–10:00 a.m. <i>Discussion</i>	<b>6.0 Next steps (Henderson Allen)</b> The group will review any next steps and or topics for future discussions.

<b>Time</b>	<b>Agenda Item</b>
10:00 a.m.	7.0 Adjournment (Henderson Allen)

## Document Inventory

<b>Doc</b>	<b>Document</b>
A	PLA Handout
B	ACRL Plan for Excellence
C	Press Release: ALA Organizational Effectiveness/Governance Review: Steering Committee
D	ALA Midwinter Meeting Registration trends
E	Groups Meeting Virtually or Face to Face MW19 and AC19
F	Membership Presentation
G	FY 2018 Indirect Cost Study Assumptions and Schedule
G1	ALA Indirect Cost Fact Sheet
G2	ALA Indirect Cost Study



**Public libraries are master collaborators.**

Our day-to-day work connects us with every sector and community demographic. At a time of political and financial turmoil, these connections are even more vital to success. Similarly, PLA and ALA collaboration strengthens libraries.

# STRONGER TOGETHER

*A STRONGER PLA = A STRONGER ALA*

**ALA** American  
Library  
Association

## PLA initiatives align with ALA strategic priorities

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**ADVOCACY:** PLA shares outcome measurement best practices throughout ALA, producing data that demonstrates the value of libraries to funders, elected officials, and other stakeholders.

**PROFESSIONAL DEVELOPMENT:** PLA develops and shares innovative CE content with ALA and supports Emerging Leaders and other leadership development opportunities to meet the dynamic learning needs of librarians.

**EDI:** PLA supports an inclusive profession through donations totaling over \$150,000 to ALA Spectrum Scholars, partnering across the association to deliver EDISJ training, and creating the Inclusive Internship Initiative.

**INFORMATION POLICY:** PLA invests in and promotes efforts like the Policy Corps and National Library Legislative Day to positively influence policy.

**ORGANIZATIONAL EXCELLENCE:** PLA's successes are ALA's successes. PLA enhances ALA's reputation.

## PLA strengthens ALA's bottom line

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**FINANCES:** In FY18, PLA contributed \$1.2 million in overhead to ALA and ALA earns annual interest on PLA's \$3.8M fund balance. The PLA Conference alone provided \$850,000 in overhead to ALA, more than PLA itself earned from the conference.

**CAPACITY-BUILDING:** PLA invested \$150,000 in ALA Development to sponsor new prospect research and boost year-end giving; added to the Libraries Transform campaign by creating a new family engagement toolkit; and supported research on the impacts of public programs.



**MEMBER ENGAGEMENT:** PLA members are ALA members and when PLA membership grows, so does ALA membership. Division membership provides volunteer and professional development opportunities that strengthen retention.

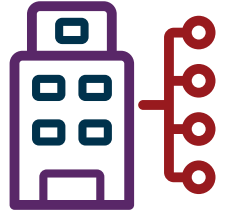
## PLA strengthens library networks

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**COLLABORATION:** PLA co-funded the From Awareness to Funding research update with ALA and OCLC, which helps us better understand how voters perceive and value libraries; IMLS-funded work with OCLC this year will document and share effective practices for addressing the opioid crisis.

**PARTNERSHIPS:** PLA develops partnerships with national agencies like National Library of Medicine and National Center for Family Learning to advance shared values and priorities.

**GRANTS:** PLA successfully works with IMLS and funders like Microsoft Foundation and Robert Wood Johnson Foundation to support library programming in key areas.



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**Your participation on ALA Council is vital to public libraries and PLA.**

**PLA needs strong ALA infrastructure and is committed to working together with ALA leaders and staff to strengthen the field and best serve our diverse communities.**

**We welcome the opportunity to support public library leaders serving on ALA Council and collaborate on building a sustainable future for our associations.**



# Plan for Excellence

## Association of College & Research Libraries

Approved April 20, 2011 — Effective July 1, 2011

Reaffirmed September 2013. Revised November 2018.

## Preamble

The strengths and capacities of ACRL have enabled the association to sustain exemplary programs and results for its members and to shape policies and practices of vital interest to higher education.

ACRL's Plan for Excellence continues that path and focuses attention on four areas that capitalize on our strengths, deliver high member value, and heighten our impact:

- Value of Academic Libraries
- Student Learning
- Research and Scholarly Environment
- New Roles and Changing Landscapes

These strategic areas will be supported by financial and operational planning, and will guide the development and implementation of programs and services that target education, advocacy and member engagement.

ACRL's leadership views strategic thinking and planning as an ongoing process. Adoption of this plan for excellence affirms the general intent and direction articulated by the association's core ideology, envisioned future, shorter-term goals, and objectives. Progress will be assessed annually and will guide the operational planning process. The plan for excellence will be updated based on achievement of the goals and their continued relevance as new needs and opportunities arise.

## Timeless Core Ideology

### Core Purpose

To lead academic and research librarians and libraries in advancing learning and scholarship.

### Core Organizational Values

ACRL is committed to:

- visionary leadership, transformation, new ideas, and global perspectives
- exemplary service to members
- equity, diversity, and inclusion
- integrity and transparency
- continuous learning
- responsible stewardship of resources
- the values of higher education, intellectual freedom, the ALA Ethics policy, and "The Library Bill of Rights"

## Core Commitment

ACRL is dedicated to creating diverse and inclusive communities in the Association and in academic and research libraries. This core commitment permeates the work of the Association, cutting across all ACRL sections, committees, interest and discussion groups, and communities of practice. The Association will acknowledge and address historical racial inequities; challenge oppressive systems within academic libraries; value different ways of knowing; and identify and work to eliminate barriers to equitable services, spaces, resources, and scholarship.

## Long-term Envisioned Future Vision

Academic and research librarians and libraries are essential to a thriving global community of learners and scholars.

### Vivid Description of a Desired Future

ACRL elevates the position, recognition, and impact of all academic and research libraries and librarians as catalysts in exceptional research and learning. Academic libraries play a critical role in building diverse, welcoming, and equitable communities; developing inclusive spaces and services; guarding against policies and practices that intentionally or unintentionally create racial inequalities; embodying diversity in the profession; and creating conditions so that all users are respected and supported in their intellectual dialogues and pursuits. Librarians and their colleagues design services that provide scholars and learners the unfettered ability to create, access, evaluate, and use knowledge. College and university students are information literate, informed scholars and citizens who value the opinions, perspectives, and experiences of others. Facile use of information sources and discovery techniques enables them to succeed in their coursework and future careers preparing them to lead new national and global initiatives. Partnering with academic librarians to collect and organize research data, faculty break new ground in their respective fields. Academic libraries, constantly transforming to meet the evolving needs of their campuses, are central to educational and research efforts.

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# Five-Year Goals and Objectives

## Value of Academic Libraries

Goal: Academic libraries demonstrate alignment with and impact on institutional outcomes.

### *Proposed Objectives:*

1. Cultivate research opportunities that communicate the impact of academic and research libraries in the higher education environment.
2. Promote the impact and value of academic and research libraries to the higher education community.
3. Expand professional development opportunities for assessment and advocacy of the contributions towards impact of academic libraries.
4. Support libraries in articulating their role in advancing issues of equity, access, diversity, and inclusion in higher education.

## Student Learning

Goal: Advance equitable and inclusive pedagogical practices and environments for libraries to support student learning.

### *Proposed Objectives:*

1. Empower libraries to build sustainable, equitable, inclusive, and responsive information literacy programs.
2. Collaborate with internal and external partners to expand understanding of the impact of information literacy on student learning.



## Research and Scholarly Environment

Goal: The academic and research library workforce accelerates the transition to more open and equitable systems of scholarship.

### *Proposed Objectives:*

1. Increase the ways ACRL is an advocate and model for more representative and inclusive ways of knowing.
2. Enhance members' capacity to address issues related to scholarly communication, including but not limited to data management, library publishing, open access, and digital scholarship, and power and privilege in knowledge creation systems.
3. Increase ACRL's efforts to influence and advocate for more open and equitable dissemination policies and practices.

## New Roles and Changing Landscapes

Goal: The academic and research library workforce effectively fosters change in academic libraries and higher education environments.

### *Objectives:*

1. Deepen ACRL's advocacy and support for the full range of the academic library workforce.
2. Equip the academic library workforce to effectively lead, manage, and embrace change, advocate for their communities, and serve as a catalyst for transformational change in higher education.
3. Increase diversity, cultivate equity, and nurture inclusion in the academic library workforce.



# ALA President Jim Neal announces new Steering Committee to examine tomorrow's ALA

For Immediate Release  
Tue, 06/19/2018

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CHICAGO – American Library Association (ALA) President Jim Neal has announced the formation of the ALA Organizational Effectiveness/Governance Review: Steering Committee, a broadly-representative committee that will work to align ALA's organizational structure, policies and rules with the association's 21st century values, key action areas and strategic directions.

"As we proceed together through this process of discovery and reimagination, there will be many choices to make," Neal said. "We will be presented with alternative paths, organizational values that are sometimes in conflict, competing visions of an ideal ALA. Helping us navigate that decision landscape is the essential work of the Steering Committee."

ALA Executive Board Member Lessa Kanani'opua Pelayo-Lozada (Palos Verdes Library District) will chair the committee and will include the following members:

- Rebekkah Smith Aldrich (Mid-Hudson Library System, NY), Sustainability Task Force Co-Chair
- Emannuel Faulkner, Sr. (Baltimore County Public Schools), Maryland Association of School Librarians President
- Kenny Garcia (California State University, Monterey Bay), REFORMA Secretary
- Mandi Goodsett (Cleveland State College), New Members Round Table president
- Terri Grief (McCracken County High School), ALA Councilor-at-Large
- Alexia Hudson-Ward (Oberlin College), Member-at-Large
- Ben Hunter (University of Idaho), Idaho Chapter Councilor
- Steve Laird (Infogroup), United for Libraries President
- Jack Martin (Providence Public Library), Rhode Island Chapter Councilor
- Alanna Aiko Moore (University of California San Diego), Spectrum Scholarship Program

- Lucinda Nord (Indiana Library Federation), ILF Executive Director
- Andrew Pace (OCLC), ALA Executive Board Member
- Juan Rivera (A. Phillip Randolph Campus High School), ALA Emerging Leaders
- Karen Schneider (Sonoma State University), ALA Councilor-at-Large
- Felton Thomas (Cleveland Public Library), Public Library Association Immediate Past President
- Kerry Ward (ALA/Library Leadership & Management Association), LLAMA Executive Director
- Nora Wiltse (Chicago Public Schools), Member-at-Large
- Steven D. Yates (University of Alabama), American Association of School Librarians President
- Shali Zhang (University of Montana), ALA Committee on Organization Member

The committee will work collaboratively with an Executive Team including 2017-2018 ALA President Jim Neal, ALA Executive Director Mary Ghikas, Steering Committee Chair Lessa Kanani'opua Pelayo-Lozada and a forthcoming external consultant.

During the 2018 ALA Annual Conference, there will be several opportunities for members to explore tomorrow's ALA through discussion of four questions:

- What do you think is the most important thing to do to improve ALA's effectiveness?
- What are your thoughts about a possible shift from a structure based on standing committees to one that would largely be based upon as-needed groups, with a core of standing committees?
- What if ALA had a much stronger relationship with State Chapters/State Associations – one that would be supported by an effective structure?
- What do you think about the possibility of a different governance structure, one in which there might be a different Executive Board/Council composition/structure/relationship?

ALA Annual Conference & Exhibition will offer members the opportunity to participate in several open small-group discussions regarding ALA's tomorrow on:

- Saturday, June 23, Morial Convention Center (MCC) 352, 9:00-10:00am  
- Facilitator: Maureen Sullivan
- Saturday, June 23, MCC 352, 10:30-11:30am  
- Facilitator: Maureen Sullivan
- Monday, June 25, MCC 352, 1:00-2:00pm  
- Facilitator: Nancy Kranich
- Monday, June 25, MCC 2:30-3:30pm  
- Facilitator: Nancy Kranich

In addition, discussions are on the agenda for two ALA governance groups including :



- ALA Council: Council I, Sunday, 8:30am (discussion at approximately 9:30am), MCC La Nouvelle Orleans Ballroom C. This discussion will be open to all Councilors and others present in the room.
  - Facilitators: Maureen Sullivan, Lessa Kanani'opua Pelayo-Lozada, Patty Wong, Andrew Pace
- ALA Planning & Budget Assembly, Sunday, 1:00-2:30pm, MCC205.
  - Facilitator: Andrew Pace

The formation of the committee is in response to discussions that took place during the 2018 Midwinter Meeting in Denver where the ALA Executive Board called upon ALA stakeholders to consider a series of “Guiding Principles” and an 18-month timeline for the work ahead. ([2017-2018 ALA CD #35.1](#))

“Thank you to members of the newly-appointed Steering Committee for committing their time, attention and varied perspectives to this important work on behalf of their Association,” Neal said. “Thank you also to members of the working group of the ALA Executive Board -- Lessa Kanani'opua Pelayo-Lozada, Patty Wong and Andrew Pace – for bringing us to this point, and to Maureen Sullivan and Nancy Kranich for bringing their facilitation expertise and experience to advance the discussion.”

The American Library Association (ALA) is the foremost national organization providing resources to inspire library and information professionals to transform their communities through essential programs and services. For more than 140 years, the ALA has been the trusted voice for academic, public, school, government and special libraries, advocating for the profession and the library's role in enhancing learning and ensuring access to information for all. For more information, visit [ala.org](http://ala.org).

**This page included to accommodate double sided printing.**

Note: ALA Columns are total attendance  
ACRL Columns are the number of ACRL members attending

**This page included to accommodate double sided printing.**

## ACRL Midwinter 2019 Report

## ACRL MW19 Joint Mtg. Doc E

Unit Name	Unit Type	Not Meeting at All MW19	Face to Face MW19	Virtual Only MW19	Not Meeting at All AC19	Face to Face AC19	Virtual Only AC19
Chapters Council	Chapters		Face to Face			Face to Face	
Academic/Research Librarian of the Year Award Committee	Committee		Face to Face		Not Meeting		
ACRL 2019 Component Committees	Committee		Face to Face		Not Meeting		
ACRL 2019 Coordinating Committee	Committee		Face to Face			Face to Face	
ACRL 2021 Brainstorming	Committee		Face to Face		Not Meeting		
Board of Directors	Committee		Face to Face			Face to Face	
Budget & Finance Committee	Committee		Face to Face			Face to Face	
Diversity Committee	Committee		Face to Face			Face to Face	
(Dr. E.J.) Josey Spectrum Scholar Mentor Committee	Committee	Not Meeting			Not Meeting		
Excellence in Academic Libraries Award Committee	Committee			Virtual Only	Not Meeting		
External Liaisons Committee	Committee		Face to Face			Face to Face	
Government Relations Committee	Committee		Face to Face			Face to Face	
Hugh C. Atkinson Memorial Award Committee	Committee	Not Meeting			Not Meeting		
Immersion Program Committee	Committee		Face to Face			Face to Face	
Information Literacy Framework and Standards Committee	Committee			Virtual Only			Virtual Only
Leadership Recruitment & Nomination Committee	Committee			Virtual Only			Virtual Only
Liaisons Assembly Committee	Committee		Face to Face			Face to Face	
Membership Committee	Committee			Virtual Only			Virtual Only
New Roles and Changing Landscapes Committee	Committee		Face to Face			Face to Face	
Professional Development Committee	Committee	Not Meeting			Not Meeting		
Professional Values Committee	Committee		Face to Face			Face to Face	
Publications Coordinating Committee	Committee			Virtual Only		Face to Face	
Research and Scholarly Environment Committee	Committee		Face to Face			Face to Face	
Research Planning and Review Committee	Committee			Virtual Only		Face to Face	
Section Membership Committee	Committee			Virtual Only		Face to Face	
Standards Committee	Committee		Face to Face			Face to Face	
Student Learning and Information Literacy Committee	Committee		Face to Face			Face to Face	
Value of Academic Libraries Committee	Committee		Face to Face			Face to Face	
Assessment Discussion Group	Discussion Group		Face to Face		Not Meeting		



## ACRL Midwinter 2019 Report

## ACRL MW19 Joint Mtg. Doc E

Unit Name	Unit Type	Not Meeting at All MW19	Face to Face MW19	Virtual Only MW19	Not Meeting at All AC19	Face to Face AC19	Virtual Only AC19
Balancing Baby and Book Discussion Group	Discussion Group		Face to Face			Face to Face	
Group	Discussion Group	Not Meeting			Not Meeting		
Copyright Discussion Group	Discussion Group		Face to Face			Face to Face	
First Year Experience Discussion Group	Discussion Group	Not Meeting				Face to Face	
Global Library Services Discussion Group	Discussion Group	Not Meeting			Not Meeting		
Heads of Public Services Discussion Group	Discussion Group		Face to Face			Face to Face	
Hip Hop Librarian Consortium Discussion Group	Discussion Group	Not Meeting			Not Meeting		
International Perspectives on Academic and Research Libraries Discussion Group	Discussion Group	Not Meeting				Face to Face	
Leadership Discussion Group	Discussion Group	Not Meeting				Face to Face	
Learning Commons Discussion Group	Discussion Group	Not Meeting				Face to Face	
Library and Information Science Collections Discussion Group	Discussion Group		Face to Face			Face to Face	
Library Support for Massive Open Online Courses (MOOCs) Discussion Group	Discussion Group	Not Meeting			Not Meeting		
Media Resources Discussion Group	Discussion Group	Not Meeting			Not Meeting		
MLA International Bibliography in Academic Libraries Discussion Group	Discussion Group			Virtual Only			Virtual Only
New Members Discussion Group	Discussion Group	Not Meeting					Virtual Only
Personnel Administrators and Staff Development Officer Discussion Group	Discussion Group		Face to Face			Face to Face	
Philosophical, Religious, and Theological Studies Discussion Group	Discussion Group		Face to Face			Face to Face	
Scholarly Communication Discussion Group	Discussion Group		Face to Face			Face to Face	
Student Retention Discussion Group	Discussion Group	Not Meeting			Not Meeting		
Undergraduate Librarians Discussion Group	Discussion Group		Face to Face			Face to Face	
Academic Library Trends and Statistics Survey Editorial Board	Editorial Board		Face to Face			Face to Face	
ACRL/LLAMA Interdivisional Committee on Building Resources Committee Editorial Board	Editorial Board		Face to Face			Face to Face	
C&RL News Editorial Board	Editorial Board			Virtual Only		Face to Face	
CHOICE Editorial Board	Editorial Board		Face to Face			Face to Face	
College & Research Libraries Editorial Board	Editorial Board			Virtual Only		Face to Face	

# ACRL Midwinter 2019 Report

# ACRL MW19 Joint Mtg. Doc E

Unit Name	Unit Type	Not Meeting at All MW19	Face to Face MW19	Virtual Only MW19	Not Meeting at All AC19	Face to Face AC19	Virtual Only AC19
New Publications Advisory Board	Editorial Board			Virtual Only		Face to Face	
Publications in Librarianship Editorial Board	Editorial Board			Virtual Only		Face to Face	
<i>RBM</i> Editorial Board	Editorial Board			Virtual Only		Face to Face	
<i>Resources for College Libraries</i> Editorial Board	Editorial Board			Virtual Only		Face to Face	
Academic Library Services for Graduate Students Interest Group	Interest Group		Face to Face			Face to Face	
Academic Library Services to International Students Interest Group	Interest Group	Not Meeting				Face to Face	
Access Services Interest Group	Interest Group		Face to Face			Face to Face	
African-American Studies Librarians Interest Group	Interest Group	Not Meeting			Not Meeting		
Asian, African, and Middle Eastern Studies Interest Group	Interest Group			Virtual Only		Face to Face	
Contemplative Pedagogy Interest Group	Interest Group	Not Meeting			Not Meeting		
Digital Badges Interest Group	Interest Group	Not Meeting			Not Meeting		
Health Sciences Interest Group	Interest Group	Not Meeting				Face to Face	
History Librarians Interest Group	Interest Group	Not Meeting			Not Meeting		
Image Resources Interest Group	Interest Group	Not Meeting					Virtual Only
Librarianship in For-Profit Educational Institutions Interest Group	Interest Group	Not Meeting			Not Meeting		
Library Marketing and Outreach Interest Group	Interest Group		Face to Face			Face to Face	
Research Assessment and Metrics Interest Group	Interest Group		Face to Face			Face to Face	
Residency Interest Group	Interest Group		Face to Face			Face to Face	
African-American Studies Librarians Interest Group	Interest Group	Not Meeting			Not Meeting		
Contemplative Pedagogy Interest Group	Interest Group	Not Meeting			Not Meeting		
Technical Services Interest Group	Interest Group		Face to Face		Not Meeting		
Universal Accessibility Interest Group	Interest Group		Face to Face			Face to Face	
Anthropology and Sociology Section (ANSS)	Section		Face to Face (Only a Social)			Face to Face	
Arts Section	Section			Virtual Only	No Reply		
College Librarties Section (CLS)	Section		Face to Face (Only a DG)			Face to Face	
Community and Junior College Libraries Section (CJCLS)	Section			Virtual Only		Face to Face	
Digital Scholarship Section (DSS)	Section		Face to Face			Face to Face	
Distance Learning Section (DLS)	Section			Virtual Only		Face to Face	
Education and Behavioral Sciences Section (EBSS)	Section			Virtual Only		Face to Face	
Instruction Section (IS)	Section	Not Meeting			Not Meeting		
Literatures in English Section (LES)	Section			Virtual Only		Face to Face	
Politics, Policy and International Relations Section (PPIRS)	Section			Virtual Only		Face to Face	
Rare Books and Manuscripts Section (RBMS)	Section		Face to Face			Face to Face	
Science and Technology Section (STS)	Section		Face to Face			Face to Face	
University Libraries Section (ULS)	Section		Face to Face (Only DGs)			Face to Face	
Women & Gender Studies Section Discussion Forum (ACRL WGSS)	Section		Face to Face (Only a Forum)			Face to Face	

# ACRL Midwinter 2019 Report

# ACRL MW19 Joint Mtg. Doc E

Unit Name	Unit Type	Not Meeting at All MW19	Face to Face MW19	Virtual Only MW19	Not Meeting at All AC19	Face to Face AC19	Virtual Only AC19
Academic Librarians Standards and Guidelines Review Task Force	Task Force	Not Meeting			Not Meeting		
ACRL/ALA/ARL IPEDS Task Force	Task Force	Not Meeting			Not Meeting		
ACRL/RBMS-SAA Joint Task Force to Revise the Statement on Access	Task Force	Not Meeting				Face to Face	
Diversity Alliance Task Force	Task Force		Face to Face			Face to Face	
Impactful Scholarship and Metrics Task Force	Task Force		Face to Face			Face to Face	
Project Outcome for Academic Libraries Task Force	Task Force			Virtual Only	Not Meeting		

Unit Type	Not Meeting at All MW19	Face to Face MW19	Virtual Only MW19	Not Meeting at All for AC19	Face to Face AC19	Virtual Only AC19
Chapters	0	1	0	0	1	0
Committees	3	17	7	7	17	3
Discussion Groups	11	9	1	7	12	2
Editorial Board	0	3	6	0	9	0
Interest Groups	10	7	1	8	9	1
Sections	1	7	6	2	12	0
Task Forces	3	2	1	3	3	0
<b>Totals</b>	<b>28</b>	<b>46</b>	<b>22</b>	<b>27</b>	<b>63</b>	<b>6</b>



# ACRL STUDENT MEMBERS

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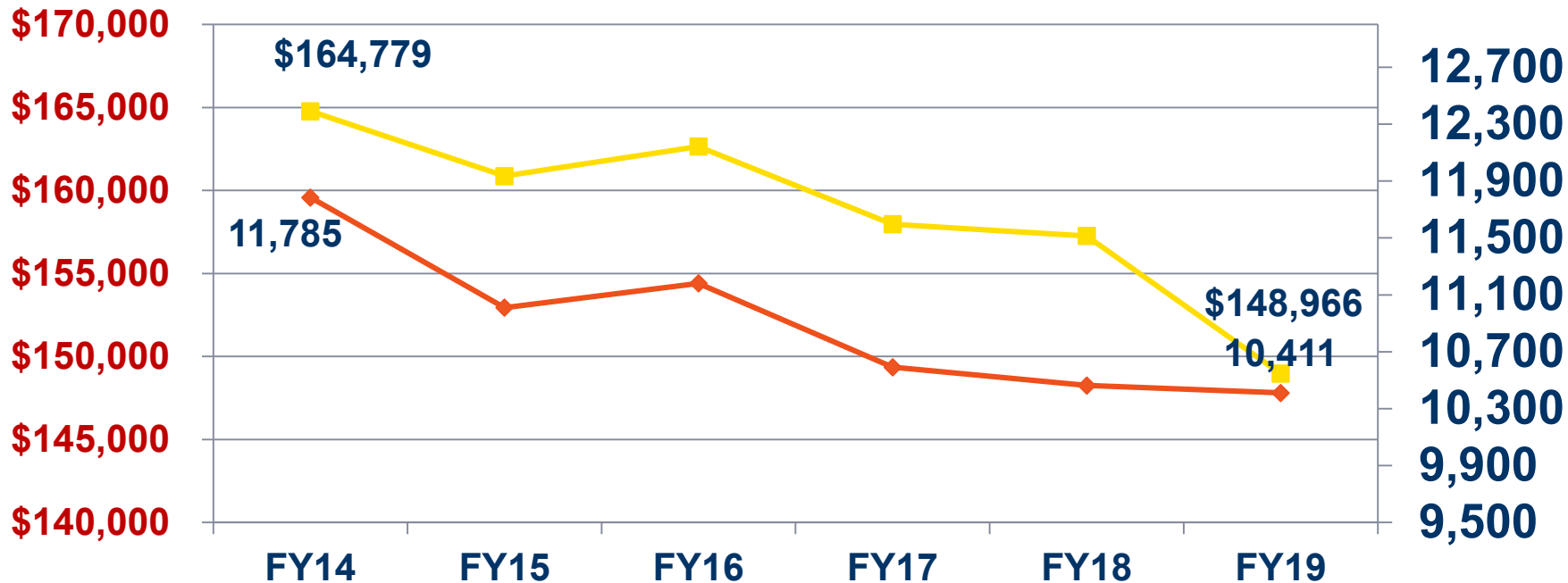
AND MORE

# BIG FINANCIAL PICTURE

ACRL MW19 Joint Mtg. Doc F

## Dues Revenue

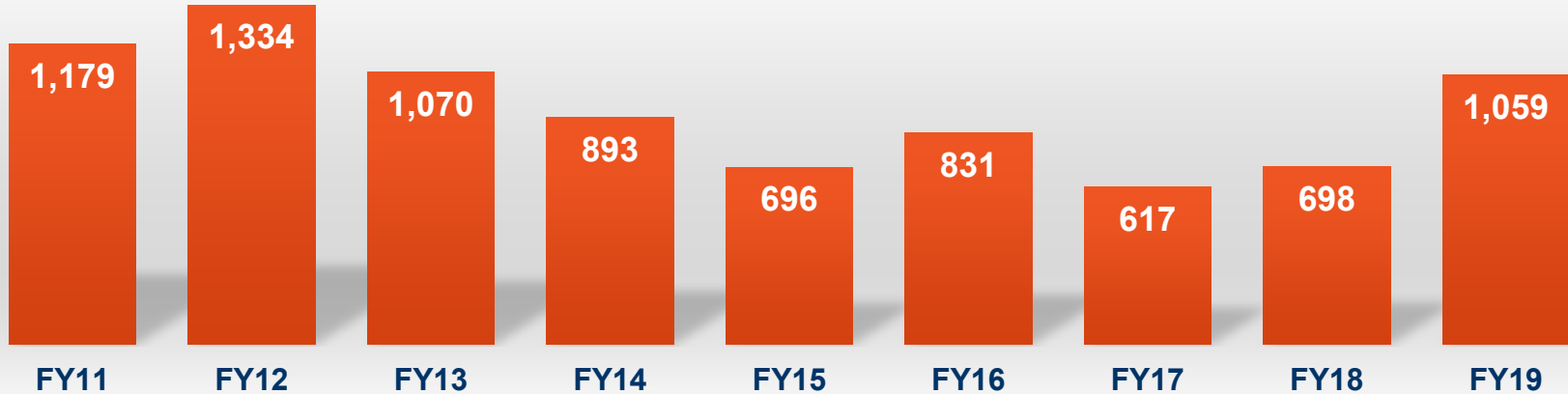
## Total Members





# ACRL STUDENT MEMBERSHIP TRENDS, FY11 – FY19

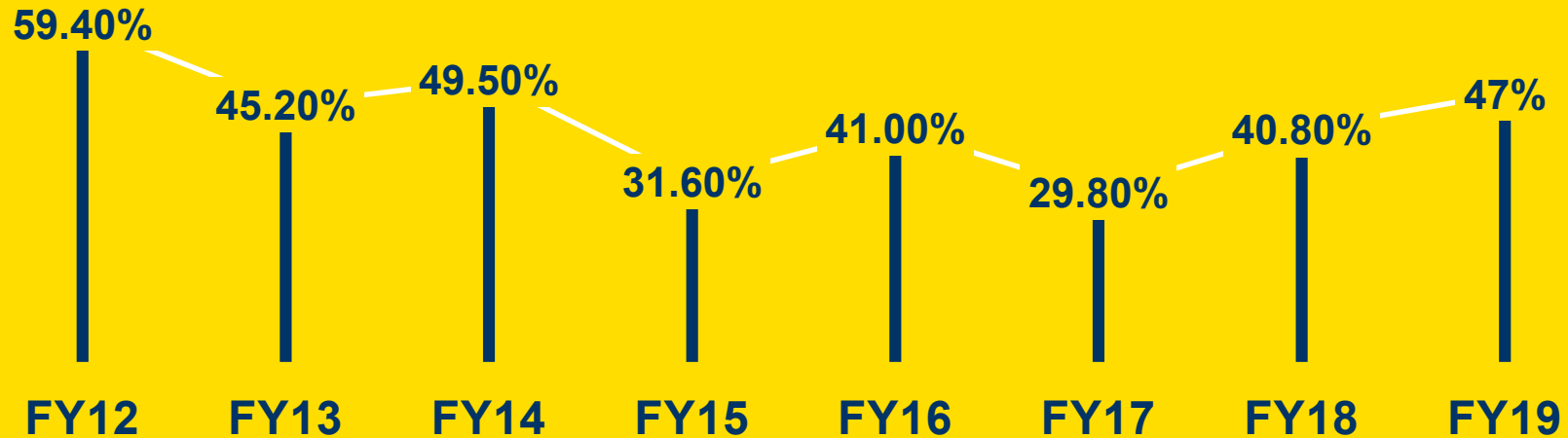
ACRL Student Membership, FY11-FY19



ACRL Student Member, FY11 - FY19

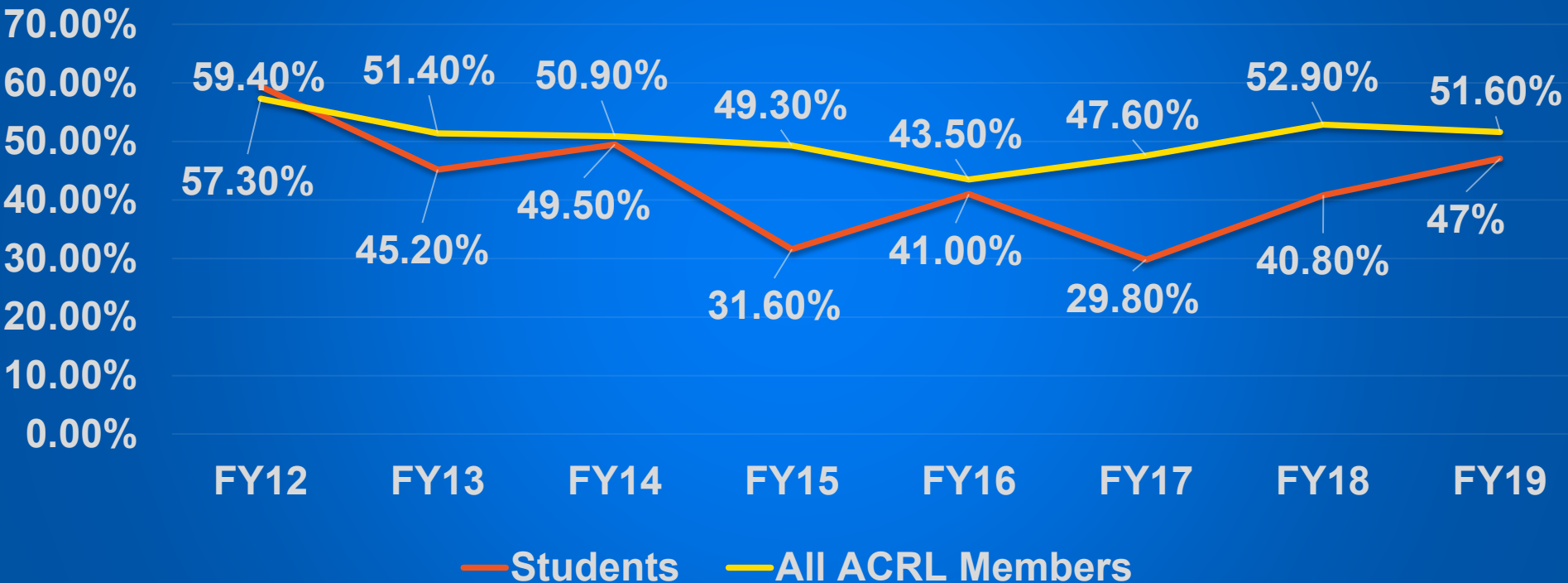
# RETENTION RATES

## STUDENT MEMBER RETENTION RATES (NOV. 2011 - NOV. 2018)



# First-year student members vs all first-year ACRL members

## First-year renewal rates compared



# Conversion Rates for 1<sup>st</sup>-Year Student Members

Class	Size	Renewed as ST	%	Renewed as R, LSS, NS	%	Total Renewed	Date
Sep-17	56	20	36%	2	4%	39%	Jan-19
Oct-17	44	11	25%	2	5%	30%	Feb-19
Nov-17	37	16	43%		0%	43%	Mar-19
Dec-17	35	6	17%	2	6%	23%	Apr-19

# Marketing Efforts – Persona Research (2018)

ACRL MW19 Joint Mtg. Doc F

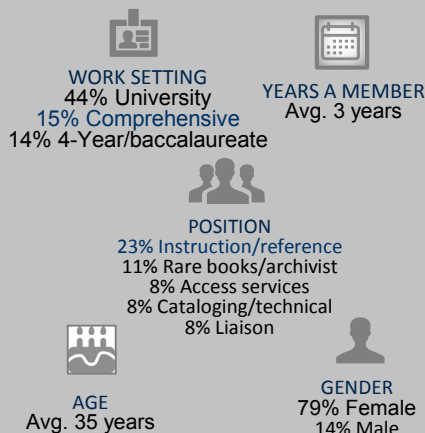




# 10 Years or Less Experience: ACRL MW19 Joint Mtg. Doc F

## Online Learners

“ACRL lets me choose how to expand my knowledge and advance my career.”



### CHALLENGES & ISSUES

- » Expanding knowledge/level of expertise
- » Personal considerations
- » Budget constraints
- » Gaining management and leadership skills
- » **Finding a job or making a job change**
- » Human resources issues
- » Obtaining a promotion/tenure
- » Keeping up-to date with trends & developments

### ATTITUDES

- » **Prefer online self-study to in-person CE**
- » **Strive to hold a leadership position**
- » Belong to ACRL to support academic librarian profession
- » **Like to network through online communities**
- » Participate in ACRL to increase skillset and marketability

### MEMBERSHIP DRIVERS

- » Keep up-to date through ACRL publications
- » Maintain/expand network of peers
- » Learn new skills to become more proficient
- » Advance career through committee service
- » Professional obligation



Competitors

69% ALA  
28% ACRL Chapter  
16% Subject discipline assn.  
43% Other library assns.



ACRL as Primary Organization

29% Primary for education  
16% Primary for networking  
19% Primary for other



Information Search Sources

72% General search engine  
60% Library website  
31% ALA website  
31% ACRL website

Blue font highlights responses that are significantly higher for segment than for total respondents

44% Not a primary org.

**ACRL Top Two Box Ratings**

- 27% Overall Performance
- 20% Value
- 18% Benefit
- 43% Likely to Recommend
- 20% Connected

**Top ACRL Benefits**

1. Career information & employment opportunities (27%)
2. Professional development opportunities (25%)
3. College & Research Libraries News (24%)
4. Opportunities to network with other professionals (23%)

**ACRL Touchpoints**

❖ **Events & Leadership**

- 26% Committee Member
- 10% ACRL 2017
- 8% ALA Annual 2017
- 5% ALA Mid-Winter 2017

❖ **Primary Section/Interest Group**

- 18% Rare Books & Manuscripts
- 11% Instruction
- 8% Community/Jr. College
- 8% Science & Technology
- 8% College Libraries

## Key Statement

Access to the education you need for the job you desire.

### Statement A

Create your personal learning program.

### Statement B

Network your way to leadership.

### Statement C

Invest in tomorrow.

# ACRL MESSAGE MAP –10 Years or Less Experience: Online Learners ACRL MW19 Joint Mtg. Doc F

## ACRL Top Two Box Ratings

- 27% Overall Performance
- 20% Value
- 18% Benefit
- 43% Likely to Recommend
- 20% Connected

## Top ACRL Benefits

1. Career information & employment opportunities (27%)
2. Professional development opportunities (25%)
3. College & Research Libraries News (24%)
4. Opportunities to network with other professionals (23%)

## ACRL Touchpoints

### ❖ Events & Leadership

- 26% Committee Member
- 10% ACRL 2017
- 8% ALA Annual 2017
- 5% ALA Mid-Winter 2017

### ❖ Primary Section/Interest Group

- 18% Rare Books & Manuscripts
- 11% Instruction
- 8% Community/Jr. College
- 8% Science & Technology
- 8% College Libraries

### Statement A

**Create your personal learning program.**

**Access timely information to stay up-to-date.**

- Read *College & Research Libraries News*
- Subscribe to ACRL Update and ACRL Insider
- Participate in eLearning and Online Discussion Forums
- Access ACRL Standards, Guidelines & Frameworks
- Access presentations from past ACRL conferences
- Take advantage of member discounts

### Key Statement

**Access the education you need for the job you desire.**

### Statement B

**Network your way to leadership.**

### Exchange ideas.

- Become active in your Section or Interest Group
- Participate in ALA Connect
- Volunteer for an ACRL Committee
- Attend the RBMS Conference

### Statement C

**Invest in tomorrow.**

**Prepare for your next position.**

- Access ACRL employment and career services
- Find a mentor through ALA MentorConnect
- View the “Where Do You See Yourself in 10 Years” webcast recording
- Read *College & Research Libraries Journal*
- Read the *RBM Journal*



**Student Membership**  
Now just \$5 with  
ALA membership!

## **OUTREACH AND PROMOTION FY19**

- ✓ Monthly Student Member of the Week
- ✓ 2019 Scholarship Application promotion (Fall 2018)
- ✓ ACRL 2019 Conference marketing to library schools within driving range
- ✓ "Start your career by joining ACRL: The largest network of college and research librarians" (Sept. 2018, C&RL News)
- ✓ "Philanthropic partnership at the University of Iowa: Providing complimentary ACRL membership to LIS students" (Nov. 2018, C&RL News)

**ACRL MW19 Joint Mtg. Doc F**  
**Student Membership**

New Publications from ACRL

Register for ACRL 2019 by Feb. 8 and save!

Volunteer for an ACRL Committee!

Trends and Statistics



**Student Membership**  
Now just \$5 with  
ALA membership!

## **OUTREACH AND PROMOTION FY19**

- ✓ February 2019: Webcast on Academic Librarianship (Membership Committee)
- ✓ Leveraging member engagement research (“if/then”) to reach out to students—most promising strategy.
- ✓ Persona-based videos (FY19 project with team)
- ✓ Student Focus Group (ACRL 2019)
- ✓ Follow-up with non-member students after ACRL Conference.
- ✓ 2019 Emerging Leader Team Project: LibGuide for Students
- ✓ Section Membership Committee: Identifying resources for students to also be added to LibGuide.

**ACRL MW19 Joint Mtg. Doc F**  
**Student Membership**

**New Publications from ACRL**

**Register for ACRL 2019 by Feb. 8 and save!**

**Volunteer for an ACRL Committee!**

**Trends and Statistics**



**2018 - 2019 EBD Info #1  
2018 - 2019 BARC Info #1**

**M E M O R A N D U M**

**DATE:** December 14, 2018

**TO:** M. Ghikas, Executive Director  
M. Leon, Chief Financial Officer  
Department Heads

**FROM:** K. Brown, Senior Financial Analyst

**RE:** FY 2018 Indirect Cost Study Assumptions and Schedule

The FY 2018 Indirect Cost Study will be conducted using the same methodology as the FY 2017 study. As such, the basic assumptions and the schedule that was used for the FY 2015 study will be the same. The final FY 2018 rate as determined by this study will be applied to certain FY 2021 revenues. As part of our efforts to better and equitably allocate costs, we will continue to review the possibility of proposing a new method for allocating legal fees, subscriptions, ITTS, PAO and Washington Office expenses. Special Note: Just a reminder that in the Spring/AC of 2018, the Executive Director (Mary Ghikas) and Division Executive Directors negotiated a rate of 26.5% vs the study produced rate of 26.7%.

The budget calendar and the operating agreement require the completion of the FY 2018 study by the Annual Conference BARC and Executive Board meetings. The final overhead rate will be available to divisions for preparations of their FY 2021 budget, which will begin in January 2019. Work on the Indirect Cost Study will begin after the completion and acceptance of the audit immediately following this Midwinter Meeting.

The following four areas factor into the 2018 study.

**I. Types of Direct/Indirect Costs:**

- A. Distribution Center (net chargebacks)
- B. Building Operations (includes plant fund)
- C. Human Resources
- D. HQ Library
- E. Production Services (net chargebacks)
- F. Reprographics (net chargebacks)
- G. Member and Customer Services (MAC)
- H. Operating Supplies (net chargebacks)
- I. Repairs and Maintenance/Lease
- J. Telephone Expense (net chargebacks)
- K. Public Awareness Office
- L. Information Technology & Telecommunication Services (net chargebacks)
- M. Financial Services
- N. Audit and Bank Fees
- O. Member Programs and Services
- P. General and Administration (Council/Administration, Executive Board, Executive Office, Communications AED, Office Services, and Business Expense)

**II. Allocation Methodology:**

<b><u>STATISTICS</u></b>	<b><u>HOW CALCULATED</u></b>	<b><u>TYPES OF EXPENSE ALLOCATED</u></b>
F.T.E.'s	08/18 Table of Authorized Positions	Operating Supplies, Human Resources
Square Footage	2018 Space Analysis	Building Operations, Huron Plaza, HQ Building and Washington Office
# of Lines	2018 Count	Telephone Expense, Repairs and Maintenance and Leases
Inter-Unit Transfers	FY 2018 Expenses	Distribution Center, Reprographics Center and Production Services
# of Members	FY 2018 Statistics	Member and Customer Services/Handbook of Organization
Unit Revenue	FY 2018 Audit Statements	Audit and Bank Fees
# of Transactions	Actual	Financial Services
Library Usage	Actual	Library
# of PC's or Time Allocation	Actual	ITTS
Time Allocation	FY 2018 Estimate (%) of Usage	PAO

**III. Formula for the composite rate for Divisions and revenue generating units:**

The sum of indirect costs for ALA Publishing and ALA Conferences will be divided by the sum of corresponding revenues.

$$\frac{\text{Indirect Costs}}{\text{Revenues}} = \frac{\text{ALA Publishing} + \text{ALA Conferences}}{\text{ALA Publishing} + \text{ALA Conferences}} = \text{Composite Rate}$$

APPLICATION OF 2018 RATE FOR DIVISIONS TO BE USED IN DEVELOPING THE FY 2021 BUDGET

50% (Publishing Related) of the Composite Rate  
 100% (Conference Related) of the Composite Rate

## ACRL MW19 Joint Mtg. Doc G

### IV. ALA Program Units

A basic assumption in the indirect cost study is that the support units exist to provide services to the programmatic activities of the organization. The General Program Offices are supported by general dues and are treated as a single programmatic entity in the indirect cost study. Accordingly, the Offices are allocated a portion of ALA indirect costs.

**The ALA units and related interest group included in the indirect cost study are:**

<b>GENERAL PROGRAM:</b>	Standing Committees (other than Council, Executive Board, BARC), HRDR, OLOS, OIF, OA, ORS, OGR, OLA, OGR, IR, PAO, Development Office, Washington Office and OITP
<b>PUBLISHING:</b>	ALA Editions/TechSource, Booklist, ALA Graphics, ALA Digital Reference, E-Learning and American Libraries
<b>CONFERENCES:</b>	Midwinter Meeting and Annual Conference
<b>DIVISIONS:</b>	PLA, ACRL, CHOICE, AASL, ASCLA, ALCTS, LLAMA, RUSA, UFL, LITA, ALSC and YALSA
<b>ROUND TABLES:</b>	LHRT, ERT, FAFLRT, GODORT, IFRT, IRRT, NMRT, LRRT, MAGERT, SRRT, SORT, LIRT, EMIERT, CLENERT, SRT, GGRT, VRT, SSIRT, GLBTRT, GAMERT and RMRT
<b>RELATED INTEREST GROUPS:</b>	ALA-APA, Coalition for Literacy, American Indian Library Association, AACR2, Freedom to Read Foundation

The FY 2018 audit Report and General Ledger Performance Reports (final close) will be the source documents used to derive the cost data used in the 2018 study.

### Indirect Cost Study Schedule

December, 2018	Review and Present 2018 assumptions and Methodology
January, 2019	Request Data used for Allocation
February, 2019	Compile Data
March/April, 2019	Completion and Review by Department Heads
Annual Conference 2019	Review by the BARC and F&A committees

**This page included to accommodate double sided printing.**

## FACT SHEET ON ALA'S INDIRECT COSTS

1. **What is the Indirect Cost Rate ?** – It is an overhead or composite rate charged to all units in the preparation of their annual budgets on certain revenues to account for the equitable allocation of commonly shared organization costs.
  
2. **What are Indirect Costs ?** – These are generally expenses that cover activities related to General Administration, Human Resources, Finance/Accounting, Telephone, Computers and Technology Services, Supplies, Building Maintenance, etc. that are incurred and paid for by the Association, i.e. General Fund for the benefit of all units.
 

**Example:** As a stand-alone unit “X” is responsible for all expenses incurred in running their operation, i.e. salary, rent, taxes, legal, HR etc. **These are direct costs.** However, unit “X,” as part of a larger organization, incurs direct costs for only certain activities – salary, professional services, conference equipment rental, temps, etc. Expenses related to keeping the unit’s financial records, maintaining the building, public relations, recruiting, etc. are incurred by the larger organization for the benefit of all units at no direct charge to their operation. **These are indirect costs.**
  
3. **Why is the Indirect Cost Rate Important ?** It allows the General Fund to recover a portion of certain day-to-day operational related expenses that are not readily identified to a particular grant, contract, project, function or activity.
  
4. **How was the Indirect Cost Rate Developed?** It is the result of extensive negotiations concluded at the 1989 Annual Conference and made a part of the ALA Operating Agreement. It represents agreement among all the ALA Divisions and Units.
  
5. **What is the Formula Used to Establish the Indirect Cost Rate ?** Per the Operating Agreement the rate is determined via a comprehensive financial model that allocates ALA’s total direct and indirect expenses.
  
6. **When is the Indirect Cost Rate Developed ?** It is developed annually, usually after the Midwinter Meeting, by the ALA Finance Department. It is based off of the year-end audited financial statements, that are approved each year by the ALA Executive Board, and internal financial (Performance) reports.

## WHAT DO YOU GET FOR INCURRING THE INDIRECT COST RATE ?

### **Publishing Services**

- Copyright Services
- Rights & Permissions

### **Activities of the Offices**

- |   |   |
|---|---|
| • Executive Office                          | • International Relations Office                      |
| • Washington Office – OITP, OGR             | • Public Information Office                           |
| • Development Office                        | • Office of Research & Statistics                     |
| • Office of Intellectual Freedom            | • Office for Human Resource Development & Recruitment |
| • Office for Literacy and Outreach Services | • Library Services (HQ)                               |
| • Office of Accreditation                   | • Chapter Relations                                   |
| • Office of Diversity                       | • Library Advocacy                                    |

**Staff Support Services**

- Human Resources – Recruitment, Training
- Building Maintenance – Space, Utilities, Elections

**Finance and Accounting Services**

- Financial Systems – Financial Reporting & Analysis
- Accounting – Financial Record Keeping
- Planning & Budget
- Business Expense – Insurance, Legal, Audit, Taxes
- Credit & Collections

**Other Activities**

- ITTS – Technology Investment
- Communications – Member/Customer Service, Marketing, PIO

**HOW IS THE INDIRECT COST RATE APPLIED ?**

The Indirect rate will **“Not”** be assessed on revenue from:

- Dues
- Donations
- Interest income
- ALA royalties to Divisions
- Travel expenses reimbursed from outside organizations
- Separately ticketed events at conference – tours/meal function etc.
- Advertising<sup>1</sup>

The Indirect rate will be applied to non-dues revenue generating activities as follows:

- The Indirect rate will be assessed at 100% of the Composite Rate on revenue from Division conferences:
  - Registration Fees
  - Exhibit Space
  - Meal Functions<sup>2</sup>
- The Indirect rate will be assessed at 50% of the Composite Rate on revenue from Publishing:
  - Sales of Materials (net)
  - Subscriptions
  - Advertising<sup>3</sup>
  - Other Miscellaneous Fees

<sup>1</sup> Except in those publications which are provided to Division members as a prerequisite of membership

<sup>2</sup> Except for separately ticketed events

<sup>3</sup> Except in those publications which are provided to Division members as a prerequisite of membership

## COMPOSITE RATE

Exhibit I

Fiscal Year 2017

Publishing Department					
	Conferences	Graphics	Publishing	American Libraries	Overall Composite Rate
Indirect Cost	\$ 1,874,999	\$ 187,810	\$ 3,015,555	\$ 384,584	\$ 5,462,948
Revenue	\$ 9,404,288	\$ 697,649	\$ 9,393,805	\$ 934,513	\$ 20,430,255
Unit Rate	19.9%	26.9%	32.1%	41.2%	26.7%
Revenue per \$ Indirect Cost	\$ 5.02	\$ 3.71	\$ 3.12	\$ 2.43	\$ 3.74

Proposed  
Negotiated  
Rate

26.5%

Accepted at 2018 AC

Fiscal Year 2016

	Conferences	Graphics	Publishing	American Libraries	Overall Composite Rate
Indirect Cost	\$ 1,914,120	\$ 209,108	\$ 3,023,071	\$ 377,894	\$ 5,524,193
Revenue	\$ 8,349,976	\$ 883,686	\$ 9,954,654	\$ 867,499	\$ 20,055,815
Unit Rate	22.8%	23.6%	30.4%	43.6%	27.5%
Revenue per \$ Indirect Cost	\$ 4.38	\$ 4.24	\$ 3.29	\$ 2.30	\$ 3.64

Negotiated  
Rate

26.5%



## BASIC DIRECT COSTS

Exhibit II

<u>EXPENSES AREAS</u>	<u>2017</u>	<u>2016</u>	<u>2015</u>	<u>FY 17 - 16</u> <u>\$ Change</u>	<u>FY 17 - 16</u> <u>% Change</u>
A. Distribution Center (Net)	\$ 70,788	\$ 114,032	\$ 125,750	\$ (43,244)	-37.9%
B. Building Operations	\$ 1,399,310	\$ 1,461,402	\$ 1,454,885	\$ (62,092)	-4.2%
C. Human Resources	\$ 846,852	\$ 716,483	\$ 730,928	\$ 130,369	18.2%
D. HQ Library/ORS	\$ 608,966	\$ 585,417	\$ 593,223	\$ 23,549	4.0%
E. Reprographics (Net)	\$ (80,028)	\$ (18,505)	\$ (42,755)	\$ (61,523)	-332.5%
F. Membership Services	\$ 958,745	\$ 562,086	\$ 637,343	\$ 396,659	70.6%
G. Small Division Support*	\$ 69,577	\$ 83,577	\$ 98,160	\$ (14,000)	-16.8%
H. American Subscription Equivalents*	\$ 387,220	\$ 416,439	\$ 344,573	\$ (29,219)	-7.0%
I. Operating Supplies*	\$ 10,256	\$ 8,468	\$ 11,371	\$ 1,788	21.1%
J. Equipment and Maintenance/Lease*	\$ 1,529	\$ 1,806	\$ 2,945	\$ (277)	15.3%
K. Telephone (Net)*	\$ 42,969	\$ 33,924	\$ 37,061	\$ 9,045	26.7%
L. Public Awareness Office	\$ 461,691	\$ 482,495	\$ 434,817	\$ (20,804)	-4.3%
M. Information Technology & Telecommunication Services	\$ 2,895,515	\$ 2,582,281	\$ 2,183,708	\$ 313,234	12.1%
N. Fiscal Services	\$ 1,610,502	\$ 1,507,481	\$ 1,501,601	\$ 103,021	6.8%
O. Audit & Bank Fees*	\$ 428,887	\$ 425,002	\$ 437,533	\$ 3,885	0.9%
P. Advocacy Member Relations - AED	\$ 259,872	\$ 670,971	\$ 557,244	\$ (411,099)	-61.3%
Q. Public Programs	\$ 194,326	\$ 205,033	\$ 140,692	\$ (10,707)	-5.2%
R. Post Retirement Benefits (Operating)*	\$ 2,212,700	\$ 2,095,876	\$ 1,386,087	\$ 116,824	5.6%
S. General & Administration					
- Council/Administration/Committees	\$ 74,393	\$ 85,386	\$ 90,808	\$ (10,993)	-12.9%
- Executive Board	\$ 358,875	\$ 357,398	\$ 370,436	\$ 1,477	0.4%
- Executive Office	\$ 1,068,912	\$ 1,039,814	\$ 996,708	\$ 29,098	2.8%
- Member Programs & Services - AED	\$ 279,212	\$ 296,174	\$ 249,250	\$ (16,962)	-5.7%
- Staff Support/Office Services	\$ 178,710	\$ 169,829	\$ 163,769	\$ 8,881	5.2%
- Legal Fees	\$ 149,579	\$ 203,540	\$ 156,704	\$ (53,961)	-26.5%
- General Business Expense	\$ 729,400	\$ 1,007,904	\$ 4,037,634	\$ (278,504)	-27.6%
- Organizational Support*	\$-	\$ 20,703	\$ (2,265)	\$ (20,703)	100.0%
Total Direct Costs	\$ 15,218,758	\$ 15,115,016	\$ 16,698,210	\$ 103,742	0.7%
\$ Change ( +/- )	\$ 103,742	\$ (1,583,194)	\$ 6,183,803		
% Change ( +/- )	0.7%	-9.5%	56.8%		
% of Total ALA Expenses	28.3%	28.3%	29.6%		
Total ALA Expenses	\$53,834,977	\$53,888,783	\$57,745,677	(\$53,806)	-0.1%

\*A component of General Business Expenses, but separated for illustration purposes.

## Exhibit III

<b>DIRECT/INDIRECT COST CHANGES</b>
-------------------------------------

Cost Type	<u>2017</u>	<u>% Total</u>	<u>2016</u>	<u>% Total</u>	<u>\$ Change</u>	<u>% Change</u>
Operating Supplies	\$ 10,256	0.1%	\$ 8,468	0.0%	\$ 1,788	21.1%
Telephone	\$ 42,969	0.2%	\$ 33,924	0.2%	\$ 9,045	26.7%
Equip/Main	\$ 1,529	0.0%	\$ 1,806	0.0%	\$ (277)	-15.3%
Human Resources	\$ 933,719	4.7%	\$ 806,814	4.2%	\$ 126,905	15.7%
Building Operations	\$ 1,424,704	7.2%	\$ 1,485,704	7.8%	\$ (60,999)	-4.1%
Reprographics	\$ (53,209)	-0.3%	\$ 9,429	0.0%	\$ (62,638)	-664.3%
Distribution Center	\$ 149,698	0.8%	\$ 190,518	1.0%	\$ (40,819)	-21.4%
ITTS	\$ 3,032,625	15.4%	\$ 2,724,498	14.3%	\$ 308,127	11.3%
HQ Library/ORS	\$ 766,933	3.9%	\$ 744,559	3.9%	\$ 22,373	3.0%
Fiscal Services	\$ 1,924,723	9.8%	\$ 1,810,379	9.5%	\$ 114,344	6.3%
Audit Fees	\$ 81,439	0.4%	\$ 95,211	0.5%	\$ (13,772)	-14.5%
Publishing AED	\$ 111,278	0.6%	\$ 153,310	0.8%	\$ (42,032)	-27.4%
Production Services	\$ 11,655	0.1%	\$ 17,194	0.1%	\$ (5,538)	-32.2%
PAO	\$ 580,509	2.9%	\$ 594,706	3.1%	\$ (14,197)	-2.4%
Membership Services	\$ 2,806,673	14.2%	\$ 2,030,264	10.7%	\$ 776,409	38.2%
General Administration	\$ 7,885,378	40.0%	\$ 8,289,560	43.6%	\$ (404,182)	-4.9%
<b>Total</b>	<b>\$ 19,710,880</b>	<b>100.0%</b>	<b>\$ 18,996,343</b>	<b>100.0%</b>	<b>\$ 714,537</b>	<b>3.8%</b>

Group Summary	<u>2017</u>	<u>% Total</u>	<u>2016</u>	<u>% Total</u>	<u>\$ Change</u>	<u>% Change</u>
Support Units	\$ 3,525,790	17.9%	\$ 3,422,856	18.0%	\$102,935	3.0%
Offices & Committees	\$ 3,529,364	17.9%	\$ 3,099,032	16.3%	\$430,333	13.9%
Conferences	\$ 1,874,999	9.5%	\$ 1,914,120	10.1%	\$ (39,120)	-2.0%
Products & Promotions	\$ 187,810	1.0%	\$ 209,108	1.1%	\$ (21,298)	-10.2%
Publishing	\$ 3,378,366	17.1%	\$ 3,410,784	18.0%	\$ (32,418)	-1.0%
Divisions	\$ 5,899,526	29.9%	\$ 5,618,822	29.6%	\$280,703	5.0%
Roundtables	\$ 193,435	1.0%	\$ 118,323	0.6%	\$75,112	63.5%
Restricted Funds	\$ 997,229	5.1%	\$ 1,076,088	5.7%	\$ (78,859)	-7.3%
Related Interest Groups	\$ 124,360	0.6%	\$ 127,211	0.7%	\$ (2,851)	-2.2%
<b>Total</b>	<b>\$ 19,710,880</b>	<b>100.0%</b>	<b>\$ 18,996,343</b>	<b>100.0%</b>	<b>\$714,537</b>	<b>3.8%</b>

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