

# ALA American Library Association

**ALA Executive Director's Report to ALA Executive Board & Council**  
**Prepared by Tracie D. Hall**  
**January 8, 2022**

## **EXECUTIVE DIRECTOR ASSOCIATION UPDATES AND HIGHLIGHTS**

The new year and beginning of FY22's second quarter, finds ALA two years into its efforts to stabilize the association and steward the LIS sector through the second year of the global COVID-19 pandemic.

Despite the unyielding disruption and unprecedented contemporary death toll that the current public health crisis has caused, libraries have gained increasing visibility as conveners, connectors, and contested spaces. In the process ALA member leaders and staff have been featured in an unprecedented number of media stories and profiles. This increased visibility has offered tremendous opportunities to build public awareness about ALA's core values and programmatic priorities namely its work centering access, education, equity, diversity, and inclusion; and intellectual freedom. Expanding that public awareness and growing ALA's stakeholder and partnership base are all areas of intensive focus for the association and outcomes considered critical to ALA's ability to provide advocacy, programmatic, and funding support for the field. Work towards those ends is outlined in this report by numerous offices, divisions, and departmental units whose contributions in the aggregate attest to the steady strides that have been made and innovations that have been realized within ALA despite this tumultuous period.

In addition to the overarching goals of ALA's current pivot (or change management) strategic plan, the "Pathway to Transformation," which necessarily centers membership and revenue development as foundational to mission fulfillment, preservation and stewardship of library services, and broader LIS sector development, ALA is also working to bring greater visibility to its ongoing positionality as the premier and trusted voice for library advocacy, the most comprehensive and connected LIS network, the leading provider of LIS professional development and continuing education, the biggest driver of diversity in the LIS workforce pipeline, and the largest non-governmental LIS granting agency in the country. Asserting and evidencing ALA's primacy in each of these areas is essential to ensuring its import and influence as a professional membership body capable of shaping and shifting occupational practice and national policy and is among its chief desired outcomes.

### **Pivot Strategy Status Report**

Now in the second quarter of its rollout, the ALA pivot strategy is on track to stand up the sixth revenue stream projected for its six-year span. With funding from the Mellon Foundation, ALA has partnered with the University of Chicago Harris School of Public Policy to bring on two Data Officers, Darcy Young and Vera Chen, who both bring impressive quantitative and qualitative data backgrounds into their positions. Alongside Conference Services, Continuing Education, Contributed Revenue, Membership, and Publishing, the Data, Design and Research stream brings needed capacity to establish ALA as an agile and responsive organization with the ability to anticipate and exceed member and sector need.

As sections of this report indicate, several units and divisions are benefiting from their alignment with the pivot plan. RUSA has seen a slight membership increase; The Chapter Relations and Public Programs Office have leveraged their abilities to attract contributed revenue to disseminate the largest grant awards in number and size that ALA has ever

provided to the field. And the new Continuing Education unit has already launched a new learning management system and is currently working on a new marketing plan.

A key facet of the plan is its emphasis on knowledge sharing and problem solving across ALA's more than three dozen units and divisions. Facilitating this goal of desiloization is the organization of cross-functional teams made up of management and non-management staff representing every area of association work. All twenty of the following teams are scheduled to have launched by the end of FY22 with those underlined having officially launched in September:

1. Advocacy and Policy
2. Awards
3. Communications
4. Conference Services
5. Continuing Education
6. Customer Service
7. Data, Design, and Research
8. Equity, Diversity, and Inclusion
9. Governance
10. Grants, Partnerships & External Relationships
11. International Relations
12. IT
13. LIS Education
14. Membership
15. Mentorship
16. Program Assessment
17. Professional Development
18. Publishing
19. Staffing Synergies & Productivity
20. Strategy & Performance Management

This report is structured to detail ongoing unit alignment to the pivot strategy's logic model. Early traction and achievements are called out herein. We look forward to conducting a comprehensive strategic performance review during the third quarter of FY22 as part of the strategy and performance management cross functional team's scope of duties.

### **Equity, Diversity, Inclusion and Social Justice Inventory and Planning**

Underpinning the association's new pivot plan is the central goal of creating greater equity, diversity, inclusion and social justice in library and information (LIS) services and the LIS workforce. Towards that end, Executive Director Hall requested that all ALA units report out on all active EDISJ projects and programs. ODLOS Director Kevin Strowder collected and synthesized this information which has been submitted as an attachment to this document. The volume and variety of EDISJ efforts being led by almost every unit present the opportunity to replicate, scale, and systematize many of these initiatives. The number and reach of these activities also suggest that the association is ready to support a more comprehensive board or member-led EDISJ initiative that might establish certain protocols and baselines for EDISJ competencies and practices across ALA.

In the near term, ALA staff EDISJ initiatives will coalesce around three main priorities: 1) Identifying and implementing strategies that will strengthen equitable and inclusive hiring practices; 2) creation of an ALA fellowship or residency program that might serve as a career accelerator for early to mid-career LIS professionals interested in LIS and/or

association management; 3) growing ALA's capacity to produce original research and analysis of the state of EDISJ in the LIS profession; and 4) the adoption of the [Diversity, Equity, and Inclusion \(DEI\) Scorecard for Library and Information Organizations](#) created by the Committee on Diversity and Office for Diversity, Literacy and Outreach Services, namely its five suggested scorecard measures:

- Embeddedness of DEI into the Culture and Climate of the Organization: Integration of diversity, equity, and inclusion into the organization which ensures that DEI is a priority;
- Training and Education: The organization provides training that keeps staff current on topics related to racism and on ways to assess the organization's current racial climate to create a more equitable workplace;
- Recruitment, Hiring, Retention, and Promotion: Effectiveness in reaching out to candidates of color for recruitment and in hiring them. Examining the consistency of retention and promotion of persons of color;
- Budget Priorities for DEI: Funding that demonstrates investment in diversity, equity, and inclusion in the organization and community, including staff, collections, programs, and services; and
- Data Practices: Plans and procedures for acquiring or collecting, analyzing, disseminating, and applying data to monitor and achieve organizational DEI goals and objectives

The Executive Office will be working over the next eleven months to bring each of these priorities to fruition by the end of the calendar year and will report its progress to the ALA Executive Board at each remaining meeting of that body through December 31, 2022.

### **Revision of the 1992 Standards for Library Services for the Incarcerated and Detained**

Supported by Mellon Foundation funding, ALA's ODLIS and Executive Offices and Publishing unit are working with a team of ALA members and stakeholders to complete the first update to *the Standards for Library Services for the Incarcerated and Detained* since 1992 (see [here](#) and [here for full pdf of former standards](#)). Comprised primarily of individuals currently working in detention center libraries or public and academic libraries that supplement these services, it is hoped that the group will complete these new, updated standards by December 2022, and that nearly 2,000 volumes of the standards will be disseminated to correctional and detention center staff in January 2023. A comprehensive status update on the project will be provided as part of the April and June 2022 Executive Director reports.

### **Accreditation Update**

At the commission of ALA Executive Board, the Office for Accreditation, and the assigned Accreditation Working Group (AWG) discussed their progress on a working report intended to outline steps to making the accreditation process more efficient and impactful at the Annual Conference board meeting. Among the recommendations yielded by that midterm report was, *"the establishment of a new commission within ALA with independent governance and membership procedures, supported by a coalition of relevant professional associations."*

The board elected to make that report the AWG's final contribution to what they recommended be a larger, more comprehensive process inclusive of the Association for Library and Information Science Education (ALISE) and with greater intentionality around efforts to revise ALA accreditation review processes to include a rubric for evaluating equity, diversity, and inclusion at the student, faculty, and administrative level.

Current ALA President Patty Wong has made collaboration with ALISE on this effort a priority and has secured that association's commitment to be co- principal investigator on a survey that will look at the goals of equity and inclusion

evaluation measures alongside prevailing issues of accreditation review committee recruitment and remuneration, accreditation process costs, and Office for Accreditation structure and budget size. Preparation for this collaborative work and survey planned for report if not completion by or before the June 2022 board meeting is being informed by past accreditation reports, including this 2016 summary, that was not directly referenced by the AWG last June: [https://alair.ala.org/bitstream/handle/11213/7194/ebd5\\_2\\_1\\_accred\\_tf\\_recommendations.pdf?sequence=1&isAllowed=y](https://alair.ala.org/bitstream/handle/11213/7194/ebd5_2_1_accred_tf_recommendations.pdf?sequence=1&isAllowed=y). Dr. Nicole Cooke of the University of South Carolina School of Information Science, Karen O'Brien, director of the Office for Accreditation, and Tracie Hall, ALA Executive Director are joining President Wong in bringing the plan of work described above to fruition.

## Transforming ALA Governance (TAG) Comparative Analysis

In support of the ongoing TAG work, the Executive Office took on the task of researching and contacting peer associations to determine overall budget, membership, and governance size, structure, and ratios to staffing. This comparative analysis, conducted late fall 2021, represents the most up to date information available and also illuminates a range of staff and member-leadership deployment approaches.

Association Name	Membership Size	Year (990)	Revenues (2018/19)	Expenses (2018/19)	# of Employees	Governance staff (FTE Equiv)	Executive Board	Council Size
<b>American Library Association</b>	<b>54,169</b>	<b>2018</b>	<b>\$ 49,989,920</b>	<b>\$ 54,042,879</b>	<b>222</b>	<b>6</b>	<b>13</b>	<b>186</b>
American Management Association	25,000	2019	\$ 62,873,225	\$ 61,872,553	230	0.5	9	N/A
American Physical Therapy Association	100,000	2019	\$ 50,235,874	\$ 48,175,689	145	1.5	15	440
American Planning Association	40,000	2018	\$ 20,376,415	\$ 20,668,439	65	4	18	149
American Psychiatric Association	37,400	2019	\$ 58,882,607	\$ 57,020,176	200	4	25	250
American Society of Anesthesiologists	54,000	2018	\$ 54,173,491	\$ 55,428,215	150	5	12	700
American Society of Association Executives	44,000	2018	\$ 30,894,525	\$ 29,617,478	129	2	20	N/A
The American Veterinary Medical Association	96,984	2019	\$ 43,324,806	\$ 43,187,254	140	4	16	147
Meeting Professionals International	60,000	2019	\$ 16,794,090	\$ 17,027,458	50	2.5	16	25
= Closest Comparison								

## Development Office/Contributed Revenue Update

As mentioned previously, we are working deliberately to position ALA to earn enough contributed revenue to allow it to significantly expand its capacity to disseminate grants to the libraries experiencing funding and service reductions. As report by the Public Programs Office, major grants from the National Endowment for the Humanities and other sources will accelerate new program models for engaging library users in civic discourse during this pandemic period. As well, funds received from two funders: the Acton Family and the Mellon Foundation in FY21 allowed ALA to distribute grants through the Chapter Relations Office. that made a significant difference in their communities. Below are four self-reported examples from recipient libraries that indicate how important it will be to seek ongoing funding to expand sector capacity.

- **New Brunswick Free Public Library, New Brunswick, NJ**  
**Grant Amount: \$30,000**

Nearly 75% of the 57,000 residents that the New Brunswick Free Public Library serves are Latinx, Asian, or Black, with 56% of all residents speaking a language other than English at home. The library is visited by many immigrant newcomers from an array of nations who see English as a critical skill in advancing their career goals. Forced to cut 25% of their staff, the grant will allow the re-hiring of two part-time staff to continue providing English as a Second Language instruction and career efforts to assist displaced workers and jobless out-of-school youths. The ALA COVID Library Relief Fund is supporting 48 hours of ESL classes with 56 students and 19 hours of career services per week at the New Brunswick Free Public Library. Three ESL facilitators were hired to provide beginner, intermediate and advanced levels of Conversation Groups and Conversation Cafes, with integrated literacy curriculum to support further education and workforce training. Four Career Navigators were also hired to provide one-on-one career assistance on job applications, resume and cover letter writing and interview skill training. The library started the publicity process after receiving the grant and officially started the ESL and Career Help service after the grant money was successfully allocated. Starting August 2nd, we helped about 50 people with 22 successfully getting interviews or employment...The ESL programs started on August 23rd and 12 classes were conducted.

- **Carter County Library, Kentucky**

- Grant Amount: \$40,000**

- Located in rural eastern Kentucky, the Carter County Public Library sees its role as a problem-solving entity. Serving an economically challenged community with limited access to technology, internet, phone service, and education resources. A 19% cut to a lean budget makes keeping the doors open a challenge. The grant will ensure that the rented Olive Hill survives, and the costs to operate the Grayson Branch will be covered. We utilize this library saving grant to pay our rent, utilities, and other operational cost as well as maintain the bare minimum staff to operate both branches of our small library. On the whole, the grant has allowed us to guarantee library services to our county, regardless of the presence of state assistance. Have used grant funds to pay the rent of Olive Hill location for the current fiscal year, and the library's portion of the Grayson Branch mortgage for the current fiscal year. Hired a new branch supervisor and paid wages equal to two months. Additional grant funds have been used to obtain cataloguing supplies, allowing the cataloging of over one thousand new items

- **Niagara Falls Public Library, Niagara, NY**

- Grant Amount: \$45,000**

- The Niagara Falls Public Library serves approximately 50,000 residents in three separate counties. It has suffered a 30% budget reduction with upcoming budget cuts expected soon. The staff has been cut by 25% and nearly 30% of the community does not have dependable access to Wi-Fi, which impacts resident children's access to educational lessons, as well as adults looking for new employment opportunities. The grant will increase the number of Wi-Fi hot spots that can be loaned to families, add a part-time technology support staff, and create a needed a makerspace to develop skills through hands-on learning. The library has been making progress in Niagara Falls and has been able to hire a full-time librarian with a tech background thanks to the grant and some additional library savings...Also leveraging grant to apply for more Wi-Fi hotspots and chrome books from FCC.

- **Indian Pueblo Cultural Center Library and Archives, Albuquerque, NM**

- Grant Amount: \$40,000**

- Dedicated to the history and culture of the Pueblo people, the Indian Pueblo Cultural Center Library and Archives suffered a 30% budget cut, reducing staff from three to just one. The Library and Archives serves the 66,000 members 19 Pueblos of New Mexico and Ysleta del Sur Pueblo in Texas, as well as researchers, and the public. The grant allows the library to hire back staff, upgrade computers that are ten years old, and purchase

new books and other resources for the community. ALA grant money has paid for two staff members to return full-time to the IPCC library. We are open to the public four days a week from 9am to 4pm, and on Saturdays by appointment. We have assisted students, adults, educators, and Cultural Center staff with research and access to archival collections. Research assistance also occurs online through email. Since July, we have had three book donations ranging from small to large. Library staff is processing these books into our library system, as well as labeling and shelving items. Book inventory has also been started in order to correct our catalog and to evaluate subject matter for topics lacking and for restrictions on sensitive subject matter content. Work also continues on scanning transcripts of past educational lectures to put online for patron access, as well as creating brief synopses of transcripts and dissertations by Pueblo people and/or about Pueblo topics for improved accessibility.

### **Staffing Update**

Much is being documented about three major pandemic-era shifts in the American workforce: the “Great Resignation,” the “Great Job-hop,” and the mass employee migration out of urban centers as remote work options multiply. Though ALA’s staff ranks are currently at around 207 employees, with capacity for a staff size of 222-227, each of these phenomena are impacting our work as the association experiences accelerated retirements and resignations from staff seeking to move to other regions, or to work remotely on a permanent basis. It behooves ALA to use these trends to review its human resource and talent management strategy with a focus on recruitment, retention, racial equity, and inclusion.

That said, key searches for management-level staff continue to meet with successful conclusions. ALA ended the first quarter of FY22 having successfully completed its search for a Chief Financial Officer and welcomed Dina Tsourdinis in that capacity in late December. A licensed Certified Public Accountant, Dina also holds a master’s and bachelor’s degree in Accounting from the University of Illinois at Chicago and is an active member of the Illinois CPA Society and the American Institute of Certified Public Accountants. Dina has worked in leadership roles in finance at several non-profit and educational institutions including UIC, SOAS Children’s Villages Illinois where she was Chief Financial Officer, Childserv, where she was CFO and Vice President of Finance, and Adler University where she served as Associate Vice President of Finance. Those who have worked with Dina describe her as extremely knowledgeable about the ongoing evolution of business accounting and a sought-after resource for the local finance and accounting sector. In addition to her own career achievement, Dina has helped prepare early career accounting professionals through her two decades of instruction at Saint Xavier University’s Graham School of Business in Chicago where she teaches Advanced Accounting, Governmental and Not for Profit Accounting, Cost Accounting, Management Accounting, Profitability and Cost Analysis, and other courses. Dina brings to this position accounting prowess, breadth of experience, and strong references, and we look forward to welcoming and working alongside Dina, who begins her tenure at ALA today. I look forward to introducing her at the next Unit Managers and All Staff meetings.

Dina’s arrival provides the opportunity to thank Denise Moritz for her formidable work in the interim CFO role. Denise’s nearly two-year tenure has been deeply impacted by the pandemic. In addition to partnering with me to realign ALA’s finances, Denise was charged with investigating ALA’s eligibility for federal support and has successfully led ALA to securing both Payroll Protection Program loans (now forgiven) and other federal assistance that helped offset major conference cancellations and pandemic-related revenue gaps. We are grateful to Denise for her teamwork orientation and her dedicated service to ALA during unprecedented times.

This report also provides the occasion to announce that Lorelle R. Swader has accepted the Associate Executive Director, Human Resources role after having served as interim in that capacity since March 2020. During Lorelle’s tenure she has supported the move of ALA’s headquarters, the creation of new staff safety reporting protocols during the pandemic

and overseen the hiring of the ACRL and PLA executive director, the ODLOS director, and new CFO. Appointed AED for ALA Offices and Member Relations and ALA-Allied Professional Association in 2018, Lorelle provided leadership and management for the ALA Office for Accreditation; Office for Diversity, Literacy and Outreach; Office for Human Resource Development and Recruitment (HRDR); Office for Intellectual Freedom; ALA Library and Research Center; ALA Public Programs Office; ALA Member Relations & Services; and chief liaison for ALA Round Tables. In 2011, while remaining Director of HRDR, Lorelle became the Director of the ALA-Allied Professional Association. Lorelle Swader has been with ALA since October 1992, when she was hired as Program Officer/Deputy Executive Director for the American Library Trustee Association (ALTA) – now United for Libraries. In 1997, she became the Director of HRDR. In this role, she was chiefly responsible for the ALA JobLIST Placement & Career Development Service. Lorelle has a B.A. in Speech Communication and an M.L.S., both from Indiana University. She also has an M.A. in Communications and Training, from Governors State University (IL), earned her Certified Association Executive (CAE) recognition in 2004 and was a member of the inaugural class of the American Society of Association Executives' Diversity Executive Leadership Program (DELP). Prior to joining ALA, Lorelle Swader held several library positions. She was Coordinator of Reference Services at the East Chicago Public Library (East Chicago, IN). Before that she held positions as Library Services Manager at the Detroit Bar Association Foundation Library (Detroit, MI) and as Law Librarian at the Marion County Law Library (Indianapolis, IN). She has also been an adjunct professor at the Graduate School of Library Science (GSLS) at Dominican University. We are grateful to Lorelle for the staunch dedication she has shown to the association for nearly three decades.

As Lorelle moves into the permanent HR position and maintains her ALA-APA leadership role, we are pleased to welcome Melissa Walling as the new AED for ALA Offices and Member Relations (AOMR). Melissa joined ALA in June 2019 as Director, Member Relations & Services. Since joining the team, Melissa has worked with the Membership Committee on a new membership model, worked with a cross-functional team to launch a new member onboarding campaign and implemented the ALA Connect Live series with Immediate Past President Julius C. Jefferson, Jr. She and her team have also supported the LMS launch, the Sympa migration project, the implementation of the Ring Central customer service solution, and the iMiS side of the Core launch and ASGLCA/ERT dissolutions. Her current work involves her working closely with Forward Together/Transforming ALA Governance initiatives to strive for dues standardization and she is also a member of the Operating Agreement Working Group. Melissa came to ALA with 15 years of association management experience working in membership, customer service, chapter relations and education. She was most recently the Vice President of Membership & Education at Association Forum and held previous roles at the American Academy of Pediatrics and the Institute of Real Estate Management. Melissa earned her Master of Business Administration from the University of Illinois at Champaign-Urbana in 2020 and is a Certified Association Executive and a graduate from the Institute for Organization Management. Melissa currently serves on ASAE's Membership Professional Advisory Council. Prior to joining the association profession, she was a U.S. Peace Corps Volunteer in Ghana, West Africa. Melissa will continue to manage the key activities of the MRS Director position until her successor is named. We look forward to the ways that Melissa's vision for membership will inform her work in this role and support ALA's strategic plan and goals.

With these new leadership announcements, we hope to continue to increase ALA's operational efficiency, membership and stakeholder reach, innovation, and leadership in the field.

This current quarter will prioritize the management-level searches for a Chief Information Technology Officer, ALA's first ever Accessibility Officer (a position to be added to the ODLOS staff team), and a Senior Program Officer and inaugural fellow for the Center for the Future of Libraries. The recruitment and onboarding of a Director for Institutional Advancement is also planned by end of FY22.

## **Conclusion**

The activities and achievements summarized above are only representative of the dozens of new programs and initiatives currently underway across the association. Despite the uncertainty of the times, the unrelenting pace of change, and hardships endured, ALA leaders, members, and staff continue to display a steadfast commitment to strengthening the nation's libraries and the communities they serve through and beyond this pandemic period and are to be commended for their unwavering dedication and vision.



## REPORTS OF ALA UNITS

- American Association of School Librarians
- Association of College and Research Libraries
- Association For Library Service to Children
- Chapter Relations Office
- Communications And Marketing Office
- Conference Services
- Core
- Development
- Finance
- Governance Office
- Information Technology
- International Relations Office
- Member Relations & Services
- Office for Accreditation
- Office for Diversity, Literacy And Outreach Services
- Office for Human Resource Development and Recruitment
- Office for Intellectual Freedom
- Public Library Association
- Public Policy and Advocacy
- Public Programs Office
- Publishing
- Reference and User Services Association
- United for Libraries
- Young Adult Library Services Association

## AMERICAN ASSOCIATION OF SCHOOL LIBRARIANS (AASL)

**Division Executive Director:** Sylvia Knight Norton

**Budget Amount (Overall Revenue/Expense):** Budget \$422,090/\$683,174; Actual \$375,585/\$533,617

**# of Staff:** 4

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

AASL unit goals align with the Pivot Strategy focus on increased membership and increased revenue. Both were developed in January 2021 as goals that will extend through FY22.

**Membership** fell short by 9% of budget (actual \$253,707 vs budget \$278,135). The loss aligns with the 10-12% loss of ALA members as reported by the membership office, yet disappointing during a year of conference planning and registrations for the AASL National Conference. The uncertainties of the year likely contributed to the loss as many school librarians chose to retire early or decided they were less involved during social isolation.

**Revenue** goal was not met during a non-conference year. AASL did successfully look beyond traditional revenue sources and worked for many months to develop a more learning-centered project to launch Pokémon Clubs in school libraries. AASL partnered in early 2021 for a revenue producing project with Pokémon. There were adjustments due to school closures and lack of social interactions, especially in the primary grades, but the clubs were a welcomed addition to offering virtual social play. Some of the original school librarian applicants for the program pushed the start of the club until the 2022-2023 school year, but clubs are up and running in 24 states. A more conclusive view of the trend will be known after the next quarter, but it appears having schools back-in-person has increased applications for clubs. AASL also partnered with the Getting Better Foundation for a member discount on the cost of streaming the award-winning "Trust Me" documentary with sessions to discuss the film and why empowering communities with information literacy is more important than ever. An additional anticipated revenue source was not received in FY2021 for a licensing agreement for the AASL Standards with a payment that was due in the spring. After repeated attempts the matter has been referred to ALA's legal counsel.

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

In March of 2020 AASL established monthly virtual gatherings of the school library community to network and brainstorm around a central theme. The *AASL Town Hall: Leading Learning* attendees usually range from 100-500 members and non-members who log in and share via the chat or audio their challenges and successes or for access later in the archives. Advocacy for school librarian positions and enabling decision makers to understand the critical role of the school librarian for teaching and learning continues to be a major issue. The town halls have included "Once Upon a Conversation" with AASL President Jennisen Lucas whose storytelling initiative moves beyond the Elevator Speech to tell a story that stakeholders will remember and bring them back to speak with us. AASL Town Halls are held in the evening, 6pm central, a time that is often noted by school librarians that enables them to attend sessions when compared to many other ALA events held during school hours. More recently the Town Hall focused on the right to read amidst the

current book challenges. OIF's Kristin Pekoll joined AASL President Jennisen Lucas and Executive Director Sylvia Knight Norton for a session with more than 700 registrants to hear advice and share their concerns and support for each other for these difficult and sensitive issues.

AASL has developed numerous communications and marketing efforts to show the value of a national association. In addition to joining the ALA for a larger and stronger voice for libraries and related issues, joining the AASL division enables benefits and language more specific to school librarians. Yet efforts to increase membership face the competition of other educational organizations focused on media or digital literacy and no cost professional development provided by vendors in addition to the continuing opportunities that school librarians have as educators in general. Most of all this year is a fatigue factor frequently cited for all educators. School librarians are retiring early or more recently have said that they are taking a year off from any association involvement when asked about their lapsed membership. However, those who attended the in-person AASL National Conference reported a renewed energy and appreciation for networking with their school librarian colleagues.

**# of Members (for Divisions):** 5476 (official report as of August)

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

*Email:*

New Member	316 emails for a reach of 1,289
National Conference	12 emails for a reach of 17,827
Other	4 mailings for a reach of 7,837

*Website views:*

AASL website	72,004
Standards	43,899
National Conf	33,814
ESSA	530

*Social media followers:*

Facebook	15,702
Twitter	32,876
Instagram	3,500
LinkedIn	3,050
Pinterest	1,497
Snapchat	172
TikTok	20
YouTube	838

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

AASL has established regular weekly emails (School Library Smartbrief, AASL Friday Forecast) in addition to the monthly AASL Digest that communicate member activities and opportunity for advertising revenue. Committees are meeting virtually, and members can submit a "Get Involved" form. We continue to hold the monthly Town Halls. The AASL National Conference held in October brought 1500+ members and non-members together in Salt Lake City.

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

As a division that holds a national conference only every other year, October 2021 was even more significant as AASL held the biennial [AASL National Conference](#) as an in-person event from October 20 – 23 in Salt Lake City, Utah.

Advocacy for school libraries and the work of school librarians was evident throughout the conference. The Opening General Session featured a keynote by Dr. Omékongo Dibinga, author of “The UPstander’s Guide to an Outstanding Life,” who talked about misinformation and recognized the important work of librarians. His “AASL? That stands for Activists, Advocates, and School Leaders” promptly went viral. At her keynote, author Kekla Magoon said, “I challenge you to be brave, to stand up for the needs of your young patrons and not shy away from shelving the books that feel important to you and to them”. Another General Session featured a conversation with administrators from the AASL School Leader Collaborative, a two-year project sponsored by OverDrive Education, who spoke about how administrators can empower a school librarian’s leadership role that impacts all learners in the community.

The bookstore, run in conjunction with ALA Publishing and Media, provided a forum to promote and sell newly released AASL/ALA Editions publications based on the *AASL National School Library Standards for Learners, School Librarians, and School Libraries* (2018). Pre-conferences also featured the authors of new publications in workshops just prior to the opening of the AASL National Conference.

Any net revenue/expense should be reflected in the next quarterly performance report from ALA, however other measurements of success are clear. AASL has for a number of years provided virtual access through recorded sessions made them available to attendees and members through the AASL Learning Library (ALL), but as ALA Executive Director Tracie Hall reminded the audience, the AASL National Conference was the first ALA in-person conference in almost two years. Throughout its planning, AASL had taken measures for a safe experience while noting it was a personal choice to attend. For the more than 1500 attendees (international and all 50 states) who did, the expressions of sincere thanks to the conference committee and staff were remarkable. There were fewer exhibitors than at most AASL conferences, but several exhibitors who did have a booth expressed that they were “grateful” that AASL did not cancel or switch to an all-virtual event and often said that means they will be at the next conference. The reactions and memories from Salt Lake City should build the support for an even more successful AASL National Conference in Tampa in 2023.

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

School librarians feel under attack. Parents, school boards, and organized groups are removing books from school libraries and publicly labeling school librarians as perverts distributing pornography. School librarians also acknowledge that this is not limited to their type of library. As the AASL President has said, if they just walked in and took books out of my library without any further consideration or conversation then the public library down the street will be next. The current climate for unprecedented book challenges is expected to continue with AASL works with OIF and PPA to provide support, to listen, and to advocate for the right to read.

AASL, as a division of ALA, can call upon the strength of the OneALA voice. Recognizing the benefits of an increased AASL membership for a voice that also resonates with stakeholders and the educational community, AASL is developing a multi-pronged plan to promote membership for review by the AASL Board of Directors. The plan includes expectations that the ALA membership efforts will provide added incentives and/or promotion that will lead to division dues from members who typically pay out of their own pocket.

AASL will also plan for continuing education opportunities for what is called a ‘non-conference year’ and add to the ALA eLearning.

## ASSOCIATION OF COLLEGE AND RESEARCH LIBRARIES (ACRL)

**Division Executive Director:** Jay Malone

**Budget Amount:** Revenues \$2,211,555 /Expenses \$2,948,895/Net -\$737,340

**# of Staff:** 13

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

Work continued in Q1 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 webcast 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. We also added in Q1 graphics encouraging non-member recipients of email newsletters and journal table-of-contents alerts to join the association. ACRL Associate Director Mary Jane Petrowski is serving on the ALA Membership Cross Functional Team to increase collaboration on membership initiatives across the association.

As of the August 2021 official count, individual ACRL membership stands at 8,129 and organizational membership stands at 512.

### **Demonstrating the Value of Libraries through Data**

As the higher education landscape continues to shift, the need to demonstrate the value through quantifiable data is greater than ever. A recent [Chronicle of Higher Education article](#) notes that "When ... students were asked what they wanted from college, they invoked convenience, service, quality, affordability, and the importance of being charged for only the services and activities they used. They did not want to pay for facilities they didn't use," A similar observation is also made by an [Ithaka S+R report](#) examining the trend towards consolidations in public colleges and universities. A recent piece published by the [Brookings Institution](#) on potential changes to federal student grants and loan regulations discusses the need to reexamine the ways in which student learning outcomes are used in identifying underperforming institutions.

As stated in ACRL's strategic [Plan for Excellence](#), it is essential to "promote the impact and value of academic and research libraries to the higher education community," especially in the current environment. ACRL's [2021 Environmental Scan](#) also notes the need for libraries and higher education institutions need to prepare for potential budget shortfalls in upcoming budget cycles, leading to a potential increase in the need for data-driven decision making. As these trends continue, it is essential for academic and research libraries to show their continued impact on the campus community while planning and evaluating their services and resources.

Additionally, an essay published by [Campus Technology](#) argues that “Data visualization and analytic tools... allow higher ed users to both literally and figuratively see patterns within information” and that “To gain more insight from analytics, consider whether your dashboards offer basic facts or dive into true understanding of patterns within your data.”

To help address this need, ACRL and the Public Library Association (PLA) now offer [Benchmark: Library Metrics and Trends](#) to power library data analysis and visualization. This new digital resource can help libraries plan, make informed decisions, and tell the story of their impact. Through Benchmark, library professionals have access to a centralized collection of their library data and the ability to compare with peer libraries using a robust set of visualization and reporting tools.

Launched in October 2021, the Benchmark tool provides the most comprehensive data available, aligning with ALA’s commitment to serving as a clearinghouse for library data and trends. It fills gaps in U.S. libraries’ ability to understand their performance in context with peers. Peer comparisons, or benchmarking, can help libraries support everyday decision-making, establish baselines, and identify opportunities to improve service. Benchmark offers dashboard visualizations aligned with principles in the ACRL [Standards for Libraries in Higher Education](#) and provides access to data from the ACRL Academic Library Trends and Statistics Survey, the largest survey of academic libraries in the country.

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 these 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.

### **Member and Stakeholder Reach:**

# of Members: 8,662 (August 2021 official total)

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

- Paid online learning attendance: 84 individuals and 7 groups
- Newsletter total opens: 83,582
- Print and ebooks sold/distributed: 1,394
- Journal website total views (*C&RL*, *C&RL News*, *RBM*): 738,469
- *C&RL News* total print circulation (3 issues): 26,481 (Note: *C&RL News* will become an online-only publication in January 2022)
- ACRL website total visits: 207,998
- Facebook: 95,801 impressions; 2,550 engagements
- Instagram: 18,813 impressions; 601 engagements
- Twitter: 103,428 impressions; 2,502 engagements
- YouTube: 8,455 views; 1,248 hours of watch time

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 three live webcasts and one online course during this report period. 84 individuals and 7 groups participated in e-learning focusing on teaching with digital primary sources, online library instruction, copyright, and leadership and management. Upcoming topics include high impact practices, implementing universal design in libraries, and change management.

- Four new ACRL books were published during Q1 of FY22 and were promoted for purchase to members and other stakeholders. 866 print and individual-use ebooks were sold, along with 528 institutional ebook copies via distributors.

## Key Activities

### 2022 ACRL Board of Directors Candidates

ACRL is pleased to announce the slate of candidates for the association's Board of Directors for the 2022 ALA/ACRL elections. Vice-President/President-Elect: José A. Aguiñaga, Glendale Community College and Beth McNeil, Purdue University. Director-at-Large: Walter Butler, Pasadena City College and Michael J. Miller, Bronx Community College – CUNY. Director-at-Large: Leslin H. Charles, Rutgers University and Rebecca Miller Waltz, Pennsylvania State University Libraries. Councilor: Merinda Kaye Hensley, University of Illinois at Urbana-Champaign and Kara Whatley, California Institute of Technology. A full list of candidates for ACRL and section offices will be available in the January 2022 issue of *C&RL News*.

### ACRL Awards Review and Survey

At its January 2021 meeting, the ACRL Board of Directors approved a proposal to pause ACRL's awards program and appointed a task force to undertake a critical review of the program and make recommendations for its future. This pause presents an opportunity to ensure all ACRL awards align with the Association's Core Commitment to Equity, Diversity, and Inclusion, and for the awards program to emerge in a stronger position in both solid finances and inspired purpose. The task force is soliciting feedback from a variety of stakeholders and members of the academic library community and has conducted an environmental scan of other associations to explore alternate models and benchmark effective practices for recognizing achievement.

### Companion Document to the ACRL Framework for Information Literacy for Higher Education: Research Competencies in Writing and Literature

The ACRL Board of Directors approved a new [Companion Document to the ACRL Framework for Information Literacy for Higher Education: Research Competencies in Writing and Literature](#) (PDF) at its November 2021 virtual meeting.

Developed by the ACRL Literatures in English Section (LES), the aim of the new Framework Companion Document is to provide librarians: concepts for improving information literacy for novice and expert learners of writing and literature, tools to help create learning objectives for information literacy instruction in these same areas, and ways to align their teaching practices with the ACRL Framework.

### New Open Educational Resources and Affordability Virtual Workshop

ACRL now has a new virtual workshop, [Open Educational Resources and Affordability](#), as part of its Off-RoadShow program. This introductory virtual workshop is intended for academic librarians and library staff interested in learning about OER and/or developing OER initiatives at their institutions. The online workshop begins with foundational knowledge about OER: What are OER? How do they impact faculty and students? Presenters and participants will also discuss examples of, and opportunities for, library involvement in affordability initiatives, analyze stakeholders and institutional context, and determine appropriate strategies and goals for real-world application.

### ACRL Advocacy Update

This quarter, ACRL joined other library associations in advocating for the interests of college and research libraries and librarians. In October 28, ACRL joined an amicus brief by the Electronic Frontier Foundation (together with the American Library Association, the Association of Research Libraries, and the Freedom to Read Foundation among other public interest groups, small tech companies, and representatives of the start-up community) in support of a petition for rehearing in *Hepp v. Facebook et al.* This September, the Library Copyright Alliance (consisting of ACRL, ALA, and the Association of Research Libraries) submitted comments regarding the procedures for libraries and archives to opt out of

proceedings before the Copyright Claims Board (CCB) under the Copyright Alternative in Small-Claims Enforcement (“CASE”) Act. Complete details on ACRL advocacy efforts are available on the [association website](#).

### **Choice Outstanding Academic Titles of 2021**

The Choice Outstanding Academic Titles (OAT) list for 2021 has been announced. This prestigious list, released in December 2021, reflects the best scholarly titles reviewed by Choice during the previous calendar year, as chosen by the editors. This year’s list features 440 books and digital resources from 132 publishers. As in previous years, Choice editors will present a weekly series of “sneak peeks” into the 2021 OAT list, providing an overview of the year’s best academic nonfiction in select subject areas. While the Outstanding Academic Titles list in its entirety is only available to Choice magazine and Choice Reviews subscribers, these curated mini-lists continue to be available to non-subscribers as well, via [newsletter](#) and also on the [Choice360.org website](#).

### **Select Future Activities and Events Through End of Next Fiscal Quarter (And Beyond):**

*College & Research Libraries News (C&RL News)*, the official newsmagazine and publication of record of ACRL, will adopt an online-only publication model beginning in January 2022. The December 2021 issue will be the final print issue of the magazine. *C&RL News* is freely available as an open access online publication. The ACRL Board of Directors and *C&RL News* editor-in-chief sought input from the Budget & Finance Committee, *C&RL News* Editorial Board, ACRL Publications Coordinating Committee, ACRL Membership Committee, and ACRL Section Membership Committee on a variety of potential publication models for the magazine. These representative groups of the ACRL membership agreed that the transition to an online-only model is in the best interest of the publication and association moving forward. The shift to an online-only publication model brings *C&RL News* in line with *College & Research Libraries* journal, which moved to an online-only model at the beginning of 2014.

Focus on activities such as online learning, publishing, and membership promotion is also ongoing over the next quarter.

## **ASSOCIATION FOR LIBRARY SERVICE TO CHILDREN (ALSC)**

**Division Interim Executive Director:** Alena Rivers

**Budget Amount:** Budgeted Revenue/Expense \$1,501,210/\$1,541,624; Actual Revenue/Expense: \$2,382,394/\$1,470,996

**# of Staff:** 7

### **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 includes conducting an ALSC CE Needs Assessment, revising 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 the ALSC 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. Of note, ALA Editions and ALSC are partnering on a publication honoring the Newbery award. ALSC will also identify new areas to expand its 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, including continuing education and virtual spaces, the impact of COVID-19 on student success, advocating for youth services library staff, and youth and family trauma. A surge in book challenges prompted by Opponents of Critical Race Theory have prompted a surge in book challenges that have created a

- Critical Race Theory and Book Challenges – ALSC's Intellectual Freedom committee has been using the ALSC blog to identify the issues and share resources to support libraries as they navigate a new and growing concern that is largely impacting children's access to diverse books. The IF committee is looking to amplify the work of ALA's Intellectual Freedom committee and expand on it to address the specific needs and concerns of youth library workers. In addition, the ALSC board of directors worked quickly to sign on to [ALA's joint statement](#), "regarding attempts to remove materials that focus on LGBTQIA+ issues and books by Black authors or that document the Black experience or the experiences of other BIPOC individuals". This issue remains top of mind for ALSC members and ALSC is working to find ways to be of support to libraries.
- Continuing Education and Virtual Spaces – Recognizing that ALSC members have seen the benefits of and continue to seek out virtual education offerings, ALSC has been adapting and developing events to a virtual space. As the state of the pandemic ebbs and flows, ALSC has been intentionally considering the most viable options for upcoming continuing education opportunities that typically have been hosted in-person. Planning for the January 2022 Bill Morris Seminar included a review of opportunities. It was determined that a virtual setting for this event would yield the most flexible and creative options for delivering the seminar in a new format.
- COVID-19 Impact on Youth and Library Staff – Even as schools and libraries began opening to in person learning and activities, and while libraries continue to expand their digital collections with e-books and audio books, provide curb-side pick-up for physical materials, improve WiFi and computer/tablet access to support students, these efforts are not enough to reduce the growing gaps in education for children whose educational experiences are varied, inconsistent and often inaccessible. Library professionals continue to navigate the best ways to deliver programming in a constantly changing pandemic environment, especially programming that can supplement the learning loss for students who had been unable to attend school in person. The pandemic and subsequent library closings resulted in employment reductions of library staff through furloughs, layoffs, and reduced work hours. As libraries assess their budgets going forward, the value of

children's library professionals may be overlooked. Library staff who serve youth are in need of tools and resources to help advocate for their positions, both within their libraries and through local and national advocacy efforts. #LookToLibraries provides resources and highlights the value of children's library professionals as youth media mentors. ALSC members are also using the ALSC blog to share information in support of advocating for library staff.

- Youth and Family Trauma –Library professionals and their communities have experienced children losing family members, feeling the consequences of job loss, economic instability and food insecurity, separation and isolation from family and friends, and now reentry to life as we may or may not remember it. Additionally, our nation is experiencing political turmoil and a profound response to racial injustices that have received new and necessary attention. Our libraries are doing more now than ever to support their communities in the midst of these traumatic life changes. Library staff want to know how to identify trauma and provide informed resources to support children and their families as they navigate the outcomes these experiences have on physical and mental health. ALSC members are aware of these issues and sought feedback from members to develop continuing education opportunities that will help library staff provide trauma-informed exchanges and resources to their library communities. A blog post series on childhood trauma has started and the committee has moved from developing a webinar on this topic to developing a toolkit which is intended to be a more comprehensive resource.

# of Members (for Divisions): **3,589 (estimate as of November 2021)**

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

**3,589 Members**

**119.2k - Twitter Impressions**

**57,668 - Reach of Facebook posts**

**22,079 - Recipients of emails**

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

Compared to FY21, FY22 Q1 estimates show ALSC with a 5.1% decline in overall membership. Although we're still experiencing small declines in overall members, estimates show ALSC's recruitment of new members continues to be strong, and in some months, even outperforming previous fiscal years. For example, the end of FY21 welcomed 76 new members, which is the highest ALSC has seen for the month of August since end of FY17 where we welcomed 79 new members. In FY22 and FY23, we plan to put a strong focus on our lapsed member groups to transition them to dues paying members again.

- 65 individuals participated in our Onboarding in Youth Services three-part paid webinar series. While number of registrants is low compared to our previous series', this is also the first paid webinar series ALSC has hosted in a few years, so it brought in CE revenue.
- 14 students participated in one fall online course.
- Engaged 177 participants in our fall 2021 Notable Children's Books open discussions.
- 35 members attended our online member Community Forum "Organizational & Electoral Process Efficiencies: Investing in Member Leaders," where ALSC leadership took a deep dive into two ballot items being brought to membership vote in the upcoming election.

At the end of FY21, we restructured [ALSC's Member Center](#) website to be more inviting and targeted to prospects, new, and existing members. We're hopeful that this more streamlined member center will support membership growth in FY22.

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

- [2021 Children's Literature Lecture Celebration](#) - honoring [Dr. Rudine Sims Bishop](#). The event (12/2/2021) featured a panel discussion on Dr. Bishop's impact on the field, pre-recorded remarks from academics and creators, and curated supplementary resources.
- [ALSC Mentoring Program](#) – A total of 33 pairs of ALSC mentors and mentees have been matched through the [ALSC Mentoring Program](#) that seeks to connect individuals with an interest in library service to children together for eight months. Throughout the eight months, matches are expected to connect at least once per month and work towards 2-3 SMART goals each pair identifies to help advance their skills and build familiarity of ALSC's Competencies for Librarians Serving Children.
- [ALSC BIPOC Mentoring Membership Funding](#) - To support the 2020-2023 ALSC Strategic Plan, and in light of the financial challenges brought by COVID-19, ALSC launched [multiple membership funding opportunities](#) for individuals who identify as Black, Indigenous, and/or a Person of Color. ALSC's latest membership funding opportunity is the BIPOC Mentoring Membership Funding Program. This funding program is geared towards recruiting and supporting a diverse pool of mentoring program participants. The objective is to diversify ALSC membership, while also diversifying librarianship and new cohorts of leaders in the field.
- [The Newbery Medal at 100 Symposium](#) - Day-long virtual symposium hosted in collaboration with the Center for Children's Books at the University of Illinois. This well-attended event featured presentations from past and present Newbery committee members, historians, and academics. The recording is available here: [https://mediaspace.illinois.edu/media/t/1\\_62mu1gyq](https://mediaspace.illinois.edu/media/t/1_62mu1gyq).
- [ALSC Emerging Leader](#) - ALSC has selected Hyunjin Han as its [2022 Emerging Leader](#) (EL). Han and a group of EL's will collaborate on ALSC's project, Welcoming and Engaging Students in ALSC and Children's Services. This project will focus on researching what current student engagement looks like in and outside of ALA and making recommendations for how ALSC and ALA can be more intentional in engaging this group of members to transition them to Regular members. Project planning will begin in January 2022, during LLX.

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

- [Newbery Publication](#) - ALA Editions and ALSC are partnering on this practical publication that features the Newbery Award. It is an in-depth look at the Newbery Award, addressing its purpose and place in the history of American literature for children, including practical guidance for library professionals serving youth and families in the public library and school settings who use Newbery books in their work.
- [Welcoming Spaces IMLS Grant](#) – in Fiscal Year 21, ALSC received a National Leadership Grant from IMLS in the area of Community Catalysts. ALSC, in collaboration with the Association of Children's Museums (ACM) planned to convene a one-day National Forum attended by representatives from 12 children's museums, 12 libraries and up to 24 of their partnering organizations to distill a set of best practices from their exemplary work serving immigrants and refugees. In response to the current situation with COVID-19, ALSC and ACM received a one-year no cost extension to the grant to host a virtual event in 2022.  
In addition to the event, ALSC and ACM will compile the best practices resulting from the forum into a white paper, and broadly disseminate the best practices document to elevate these practices and encourage their adoption by libraries and children's museums.
- [Bill Morris Seminar](#) - This year, [Morris Seminar](#) participants will gather virtually every Friday in February 2022 to 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.

## CHAPTER RELATIONS OFFICE (CRO)

**Unit Manager:** Michael Dowling

**Budget Amount (Overall Revenue/Expense):** \$138,067

**# of Staff:** 1.5

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

☒ Continuing Education; ☒ Contributed Revenue; ☒ Membership

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

#### Membership

- Added the Virginia Library Association as the 50<sup>th</sup> (last) state chapter to be part of the Jt. Student membership in November. Promoted Jt. Student membership to all ALA accredited programs through faculty liaisons and student chapter leaders. Continued administering payments and memberships to ALA Chapters for joint-student membership.
- Held a webinar of ALA Student Chapter Leaders in October to discuss ways to promote membership and engagement with students in their programs. Twenty Student Chapters participated.

#### Continuing Education

- Conducted a Chapter Management Exchange Webinar in October on *EDI in Chapters* following up on the question posed in the *State of the Chapter* survey. Three Chapters shared with their peers how they have set up EDI committees and other groups and what activities they have been doing. Assisted ODLIS EDI training sessions with chapters, consortia and libraries in California, Illinois, Rhode Island, and Pennsylvania. Partnered with Consumer Financial Protection Bureau and the Veterans Administration to host a webinar in November (Veterans and Military Families Month) on free resources for vets and military families, which had 70 participants.

#### Contributed Revenue

- Continued to receive staff support from Acton Family Giving and the Mellon Foundation for ALA Covid Library Relief Fund. Provided information from activity from ALA Library Covid Relief Fund grantees to Development Office to seek additional support from funders.

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

- There is ongoing concern that three large Chapters (FL, IN, NY) are without staff leadership going into state legislative sessions. CRO has reached out to each Chapter but there has not been much feedback thus far.

- Censorship challenges across the country continue to beleaguer libraries and their staff nationwide.

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

- Held ongoing communications with Chapter Leaders in 57 states, regions, territories through Connect messages.
- Engaged leaders in 60 ALA Student Chapters.
- Disseminated ALA Covid Library Relief grants to 34 libraries.
- Engaged and consulted with directors of libraries in Louisiana, New Jersey impacted by Hurricane Ida.

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

Worked with ALA COVID Library Relief Fund grantees as they managed their grants with some needing to make spending adjustments. *ALA Student Chapters* and *ALA* session provided chance to connect with new cadre of leaders at LIS programs across the country (and Canada and Puerto Rico). Chapters, state libraries, and individual libraries appreciated reach out in aftermath of Hurricane Ida (some donations made in December)

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

- The *ALA COVID Library Relief Fund* provided much needed financial support to 34 libraries in the U.S. and territories to keep serving their communities.
- Working with PPA to represent ALA in *Communities for Immunities* initiative and reviewing applications for libraries and museums to create activities to help overcome vaccine hesitancy in their communities.
- Providing an opportunity and space for Student Chapter Leaders to gather and connect.

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

- New Chapter Leaders Orientation, Chapter Councilor Orientation, Crisis Communication Webinar
- Final reporting of *ALA Covid Library Relief Fund* grant efforts
- *Communities for Immunities* promotion of activities

### **COMMUNICATIONS AND MARKETING OFFICE (CMO)**

**Unit Manager:** Stephanie Hlywak

#### **Budget Amount(Overall Revenue/Expense):**

- Expenses FY22 Grant Fund Budgeted: \$237,056
- Expenses FY22 General Fund Budgeted: \$512,977
- Expenses FY22 Total: \$750,033

**# of Staff:** 6

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

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

☒ Membership

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

The Communications Cross Functional Team has split into two subteams to approach the work of 1) creating a one-ALA style guide, and 2) assessing communications vehicles (email marketing, for example, as well as e-newsletters, blogs, and other forms of digital communication). Both teams are working toward optimizing ALA's external and member-facing communications to achieve our business goals.

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

- CMO continues to work with CS on LLX marketing and communications strategies.

Goal: Serve as business owner for Julius Jefferson's presidential initiative around brand, with support from Membership and the Exec Office.

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 Workgroup met for the first time in November, and a subgroup of that larger team met to evaluate the project RFP for a consultant to determine feasibility of a campaign. The charge of the workgroup is to develop, review and recommend a new public awareness campaign, including investigation of a potential membership level geared toward the general public. We hope to have RFP responses in January and hire someone in early Q2.

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

- The work of CMO over Q1 was responsive to the ongoing assaults on the freedom to read in school and public libraries across the country. Our media relations team fields dozens of inquiries from top tier media each week and is in a constant state of planning, coordinating, and preparing for interviews. Deborah Caldwell-Stone has served as the chief spokesperson for ALA on this issue, and due to her extraordinary knowledge and excellent interview skills, she is in much demand.
- Similarly, CMO has worked to integrate the narrative of ALA's work against censorship into giving messages, most notably partnering with Development on the Giving Tuesday strategy as well as year-end giving.
- In addition, CMO continues to partner with Conference Services to promote LibLearnX; was asked by the new eLearning unit to help coordinate their launch; and works closely with Membership on ongoing onboarding email activity, ALA Connect Live programs, and membership communications.

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

- **ILoveLibraries.org:** During the period from September 1 to November 30, ilovelibraries.org (ALA's public facing website) netted 100,739 total pageviews. These were our top ten most clicked articles:

- The Top 10 Banned and Challenged Books of 2020
- [Take Virtual Tours of These Stunning Libraries](#)
- [#LibraryTikTok Takes You Behind the Shelves](#)
- [Our Favorite Books About Libraries and Librarians](#)
- [5 Reasons Everyone Should Have a Library Card](#)
- [What It's Like to Be a Library Cat During the Pandemic](#)
- [It's Time to CELEBRATE LIBRARY CARD SIGN-UP MONTH](#)
- [5 Reasons to Love School Libraries \(and the librarians who work there!\)](#)
- [8 People Share Why They Became Librarians](#)
- [Video Chat from the Library with These Webcam Backdrops](#)

### Library Card Sign-up Month

To help libraries prepare for Library Card Sign-up Month, CMO produced a suite of free resources, including a mini-poster and digital graphics featuring Honorary Chair Marley Dias, a customizable library bingo card, and media tools such as a sample press release, proclamation, and sample social media posts, available in both Spanish and English.



#### Highlights

- Visits to Library Card Sign-up Month web pages on ALA and I Love Libraries websites were more than 45,000.
- Library Card Sign-up Month posts on ALA and I Love Libraries social media channels garnered more than 388,000 impressions and 9200 engagements.
- The hashtag #LibraryCardSignUpMonth was used almost 6,000 times on Twitter.

A promotion to encourage user-generated content on social media encouraged library lovers to share how the library empowers using the hashtag #LibrariesEmpower. The hashtag was used more than 700 times on Twitter.

### Giving Tuesday

CMO continues efforts to assist revenue-generating units across the association.



CMO created a landing page, emails, digital graphics, and social media posts that helped ALA more than double Giving Tuesday results from previous years.

### Conference Marketing

CMO continues to provide marketing support for ALA Conference Services by assisting with email marketing efforts and execution of digital advertising campaigns. An example of messaging created for LLX has been provided below.



## ALA and “I Love Libraries” Social Media Metrics

Social Media Channel	Followers/Fans	Impressions	Engagements	Clicks
ALA Twitter	224,768	3,714,037	31,156	5,636
I Love Libraries Twitter	60,522	249,952	3,039	290
ALA Facebook	211,836	1,391,889	53,951	15,338
I Love Libraries Facebook	111,498	177,636	6,733	1,063
ALA Instagram	65,574	332,447	17,771	915
ALA LinkedIn	75,815	342,208	12,757	5,648

## 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.

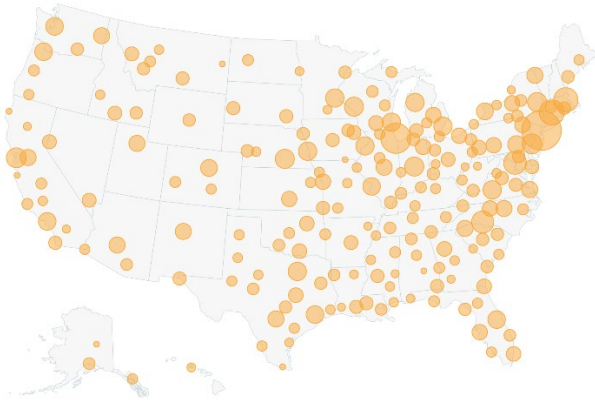
## Overall Media Snapshot for Sept. 1 – Nov. 30, 2021

- 9,029 articles/mentions
- 11.9 billion in circulation
- \$15.7 million in publicity value

**ALA WAS MENTIONED IN EVERY STATE IN THE U.S. DURING THIS REPORTING PERIOD.**



Mentions by DMA



## WHAT ARE REPORTERS SAYING?



## COVERAGE HIGHLIGHTS

### Library Card Sign-up Month, (September)

- More than 1,128 Library Card Sign-up Month (LCSM) clips were recovered during this reporting period. Coverage produced a circulation rate of more than 940 million and a publicity value of more than \$2.9 million.
- Marley Dias, author, executive producer, and founder of #1000BlackGirlBooks, served as the 2021 Library Card Sign-Up Month honorary chair and appeared in graphics and Print PSAs used within print TV coverage.
- Most Library Card Sign-up Month coverage occurred locally and reflected messaging available within ALA member press release templates and other promotional materials. Local media coverage focused on local library announcements, fine free efforts, amnesty programs, giveaways, family events, the value of library offerings, and much more.
- CMO developed several media assets, including a web press kit, member publicity tools, press materials, audio Public Service Announcements (PSAs). As CMO placed audio PSA with Westwood One, ALA members used LCSM tools to secure local media coverage.

- Westwood One radio network reaches 250 million people each week through 434 owned-and-operated stations in 89 US media markets (including eight of the Top 10), more than 7,300 broadcast radio affiliates, and numerous digital channels.

### **Banned Books Week, Sept. 26 – Oct. 2, 2021**

At a time when LGBTQIA+ books and books that focus on racism and racial justice are challenged for removal from the library and school bookshelves, this year's Banned Books Week was a reminder of the unifying power of stories and the divisiveness of censorship. This year's theme, "Books Unite Us. Censorship Divides Us," underscored how books reach across boundaries and build connections between readers.

- More than 1,500 Banned Books week articles were captured by CMO's media monitoring software resulting in a circulation rate of more than 2.5 billion and a publicity value of \$3.4 million.
- CMO worked closely with ALA's Office for Intellectual Freedom (OIF) to develop a web [press kit](#), [press materials](#) and messaging. OIF Director Deborah Caldwell-Stone served as our spokesperson and participated in interviews with NPR, [South Dakota Public Radio](#), [Ed Week](#), [CNN](#), [CBS](#), [USA Today](#), [Washington Post \(The Lily\)](#), [Insider](#), [WBBM Radio](#), [Yahoo Lifestyle](#), [Publishers Weekly](#), and [WAND-TV](#) (Decatur, IL).

### **Carnegie Medals for Excellence in Fiction & Nonfiction shortlist announcement, Nov. 8, 2021**

On Nov. 8, the ALA announced the shortlist for the 2022 Andrew Carnegie Medals for Excellence in Fiction and Nonfiction. CMO secured placement with the [Associated Press](#), which was picked up hundreds of national and international news websites. Trade publications like [Kirkus Review](#), [Publishers Lunch](#), [American Libraries](#), [Publishers Weekly](#), [Library Journal](#), and a host of other trade publications also provided coverage. More than 260 newsgroups picked up our announcement resulting in a circulation rate of more than 3.1 million and publicity value of more than \$260,000. The ALA will announce 2022 medal winners on Sunday, Jan. 23, 2022, at the RUSA Book & Media Awards (BMA), during LibLearnX: The Library Learning Experience.

### **Uptick in Book Challenges**

During this reporting period, a national campaign demanding the censorship of books and resources that mirror the lives of those who are gay, queer, or transgender, or that tell the stories of persons who are Black, Indigenous, or persons of color, has surfaced. Attempts to stigmatize a wealth of diverse books in our nation's schools, libraries, and universities and diminish our understanding of the human experience have been met with opposition from library advocates and professionals.

CMO continues to work closely with OIF and PPA to produce information resources to support internal and external responses. This national struggle has captured the interest of national and local media. CMO created a [Web press kit](#), multiple [newsfeeds](#) and coordinated more than 42 press interviews with OIF Director Deborah Caldwell-Stone and national and local newsgroups. Interview highlights include [The Guardian](#), [Chicago Tonight](#), [NBC.com](#), [Washington Post](#), [Yahoo News](#), [CNN.com](#), [NPR](#), [TIME](#), [New York Times](#), [Dallas Morning News](#), and many more.

The ALA and OIF were mentioned in more than 456 articles regarding the uptick in challenges to library materials, resulting in a circulation rate of 2 billion and a publicity value of \$1.9 million.

As this trend continues, CMO will continue to work with internal stakeholders to respond to press queries and to help support other response efforts.

### **Upcoming Events**

- LibLearnX, Jan. 21 – 24, 2022
- I Love My Librarian Awards Event, Jan. 22, 2022
- RUSA Book & Media Awards (BMA) announcements, Jan. 23, 2022
- Youth Media Award Announcements, Jan. 24, 2022

## **CONFERENCE SERVICES**

**Unit Manager:** Earla Jones

### **Budget Amount (Overall Revenue/Expense):**

- LLX - Budgeted Revenue/Expense: \$1,232,250/\$745,549
- AC - Budgeted Revenue/Expense: \$5,812,375/\$5,431,892
- Combined Budgeted Revenue/Expense: \$7,044,625/\$6,177,441

**# of Staff:** 6

### **Revenue Streams Supported:**

☒ Conference Services

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

*Goal 1: 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:*

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

*Goal 2: Successfully launch and reach attendance target for LibLearnX in FY22 to meet, enrich and celebrate the evolving needs of library professionals, attract, and retain early career and new library workers among others, and to create greater visibility of ALA's assets. The areas of focus this quarter include:*

- Securing future dates and locations for 2024-2026
- Transition plan for launch of LibLearnX from in person to Virtual based on Board vote in September 2021
- Promoting program based on the work of the LibLearnX Subcommittee
- Collaborations with local constituents in San Antonio community for the kickoff year of LLX, highlighting emerging innovations and best practices in Texas

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

*The LibLearnX continues to be primarily affected by external trends and threats. The continued public health crises have impacted professional development budgets. Registration opened October 15, and many of the factors identified in earlier analyses continue to hold viable and allow for pulse checks as we plan, implement, adjust, and reset tactics for success. Areas that have been identified and the key focus of marketing:*

- *Internal opportunities include directions to ALA staff on how to encourage member leaders to attend and promote the event.*
- *Member awareness of the new event with the high rate of email opt-out from ALA communications.*
- *Governance protocols and how they relate to professional development (per ALA by-laws).*
- *The dynamic of Zoom fatigue for members - defined as a real tiredness, worry or burnout associated with the overuse of virtual platforms of communication, particularly videoconferencing; also used to refer to non-Zoom video conferencing platforms.*

That said The launch of this new event has already yielded many lessons learned and areas where the need to revisit aspects of the business model are evident. ALA conference staff and member stakeholders are committed to a thorough post-mortem analysis after LLX is completed. The results of that evaluation will be shared.

A recent LLX status report to the ALA Board provided adjusted projected attendance and an aligned marketing strategy, and timeline. Highlights of that report are provided below.

The initial registration target of 4,000 (1,000 students; 3,000 members) for LibLearnX (LLX) was based on holding an in-person event in San Antonio, TX. In September when the ALA Executive Board voted to shift LLX to a virtual experience, the target registration number was unchanged, but the registration fee was adjusted to virtual pricing. With a 30-day window to pivot the marketing strategy, registration opened as scheduled on October 15th. Approximately 1200 attendees had registered (fewer than the MW 2021 pace) at 3 weeks out from the January 23 start date. See comparison:

- 3 weeks out MW21 – 3120 or 62% of target of 5,000 (closed at 7,004)
- 3 weeks out LLX22 – 1200 or 30% of target of 4,000

Taking this into consideration, Conference Services adjusted the registration projection from 4,000 to 2,000 to reflect the impact of various notable environmental factors including the documented virtual event fatigue, (including among tradeshow exhibitors), limits on non-direct service spending at libraries, and the surge in COVID cases impacting library staff time and resources.

To reach that attendance target, Conference Services continued to work their LLX marketing plan, which included bi-weekly emails, social media promotion, remarketing ads, templated emails for division and RT leaders to send, additional staff promotion, and website updates.

**# of Members/non-members/other stakeholders reached during quarter:** Event marketing statistics reveal that throughout our \*eblast registration timeframe (Oct. 15-Dec. 16), and using our list of approximately 67K, we have delivered 664,637 emails. There are 153,456 ppl who opened and 4,810 click-throughs, resulting in unique LibLearnX website visits. (\*A total of 13 ebasts, as of 12/20/21).

Note: 20.8K followers on the ALAConferences Twitter channel

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

The marketing and promotion strategy to engage the ALA member-public and constituents, continued this quarter, 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 which include, and not limited the Call for Presentations Closing, Education Sessions Announced, Theater Speaker Announcements, Registration Opening, and Advance Rate Ending.

Hashtag: #LibLearnX

Conference Services provided marketing **toolkits** with social media copy, digital graphics, and talking points to the Executive Board members and ALA President; ALA Staff; Session Presenters; Featured Speakers; Sponsors; and State Chapters. The following will have received toolkits with an ask to promote to their associates and peers, communicating sessions, conference features, and speakers they're excited to find at LLX.

- ALA Executive Board
- ALA Conference Committee
- ALA Divisions, Roundtables, and Affiliates
- All Staff
- Content Leaders
- Other:
  - o **Event Ambassadors** – *Emerging Leaders and Spectrum Scholars who can speak on behalf of ALA. They will communicate event benefits on their social media (Twitter, IG Stories, and TikTok).*
  - o **Exhibitors and Publishers** received an Exhibitors/Publishers Toolkit from Hall Erickson.
  - o **Featured Speakers** are each asked to promote their session on social media.
  - o **ALA Press:** CMO media relations team received a draft press release prior to the opening of registration (Oct. 7)
  - o **Promotion Partners** (state chapters and libraries) – *An invitation letter will be sent to chapters/libraries to request that they promote the conference to their members and staff. Those that agree will be sent the promotion toolkit with sample copy and graphics.*
  - o **ALA Membership:** Conference Services collaborated with ALA Membership to provide promotion for social media and Membership deliverables (newsletters, ALA Membership website page, etc.).
  - o

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

- September 15 - Focused marketing began for LibLearnX: The Library Learning Experience -- <https://www.alaliblearnx.org/>
- October 1 –The Annual Conference 2022 call for presentations closed and the ALA Conference Committee met in November to finalize the program.
- October 15 – Registration opened for LibLearnX with sample programs available on the website. Advance rates were available through November 30. Regular rates went into effect December 1.

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

- December 2022 – the initial Save the Date will be distributed to kick-off promotion for the next Annual Conference with the official dates of June 23-28, 2022, in Washington, DC. Registration is slated to open February 7, 2022.

## CONTINUING EDUCATION

**Revenue Stream Manager:** Daniel Freeman

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

**# of Staff:** 2

**Revenue Stream Supported:**

☒ Continuing Education

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

In Continuing Education's inaugural Quarter as a unit, we made major strides toward consolidating our impact stream and ensuring that CE continues to be a strong and growing source of revenue for the association.

- The new [ALA eLearning Site](#) was launched in early November. This was the culmination of an ALA-wide effort that puts us in a position to leverage this tremendous asset and continue to standardize eLearning operations. In building the site, we accomplished several goals directly tied to the Pivot Strategy:
  - All ALA eLearning now lives on one site, where it can be cataloged, purchased, and executed.
  - Live courses and webinars now operate through standard pricing and discount structures.
    - This includes access to bulk discounts and the ALA Plus Pass, which provides a CE discount incentive for members who join multiple divisions.
- As of mid-December, the site has seen nearly \$75,000 in transactions across ALA, with over 400 purchases running through the site. Member/Customer reception has been positive, with encouraging feedback via e-mail and social media and MRS reporting no uptick in customer service issues.
- The CE Unit is now the central hub for institutional purchases of eLearning. We've worked with state and institutional customers to process over \$15,000 in orders thus far for a variety of ALA Units. Customers who previously had to work through multiple points of contact at ALA to make these purchases now work only through the CE unit.

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

The new eLearning site—successfully launched in early November—was at the center of our work this quarter. The site was launched in a library environment still shaped by the pandemic. The need for eLearning continues to increase and our members are demanding a more efficient and unified ALA, so the launch was an important accomplishment at an ideal time.

We've worked to ensure that social justice and DEI offerings are at the center of ALA CE. We continue to expand our catalog in these areas, supporting both our mission and our revenue goals.

To accommodate technological and some internal organizational challenges, we had to reschedule the launch date which led to our schedule of events being pushed back, so a lighter-than-usual fall schedule led to lighter-than-usual revenue.

We were training ourselves within the unit at the same time as training staff on the new site, and we learned together about what's possible with a more advanced platform. We are pivoting to both new event formats and new ways of leveraging existing content to increase impact. These include packages of on-demand events, self-paced courses, and

joint inter-unit projects. As we navigate our new roles in the CE unit, which require us to balance our own unit's revenue goals with supporting work across the association, we are integrating our ongoing acquisitions and marketing programs.

We are working across ALA to ensure that centralized CE through the new site is used universally. We are engaging with Roundtable liaisons to begin the process of transitioning Roundtable webinars (both free and paid) to the new eLearning site, and with membership to ensure that the site is leveraged effectively as a resource to drive member engagement. We also anticipate increased bulk sales based on promoting the affordances of the new site to our institutional partners.

Given the highly competitive online CE environment, the improved discoverability of all ALA events in one place and the more attractive, user-friendly platform are important new competitive benefits.

**# Of Members/non-members/other stakeholders reached during quarter:** Over 4,000 have created accounts on the new site; over 40,000 reached through marketing.

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

Member engagement with the CE unit and new site has been overwhelmingly positive, but our unit is behind on revenue goals. We expect to make this up through Q2-4.

- As of early December, we booked approximately \$94,000 in sales (roughly half the Q1 revenue target).
- Sales per-event are close to our levels last year, averaging about 35 participants per webinar and 12 per eCourse. This is a positive sign, as our volume of events will increase in the coming months.
- We've currently got more than 25 events booked for winter and early spring; while challenging our capacity, this should get revenue back on track.
- The CE unit's engagement in free events does not have a direct revenue impact on our unit but increases member engagement, supporting value propositions and renewals.

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

- In little over a month, more than 4,000 ALA members have accessed the new eLearning site as students, with thousands more browsing the catalog.
- We trained eLearning stakeholders across ALA to use the new site. We created a large volume of both video and text documentation, with a significant assist from United for Libraries. We succeeded in training all eLearning stakeholders to set up and execute live events.
- We are working with MRS to begin new eLearning initiatives that will both incorporate eLearning as an incentive for membership and increase the visibility of the new site.
  - On December 15<sup>th</sup>, we ran the first in what will become a series of ALA Member-Exclusive webinars, *Censorship and Mental Health: Dealing with the Emotional Fallout of Book Challenges*. We had over 500 registrants and over 200 live attendees for this mission-focused event.
  - We are participating in reviewing bundling options with membership, looking at opportunities to integrate CE value and access with specific levels of dues.
- DEI and Social Justice-themed eLearning events continued to attract significant registration. Notable events included *Be the Change: Best Practices for Impactful Social Justice Programs through Local Partnerships* (PLA) and *Inspiring Literacy Activism: Literacy and Community at Your Library* (Continuing Education).

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

- Focus both within the unit and with the CE Cross-Functional Team on strategic planning around content, including initial discussions about more coherent pathways and ALA-branded recognition of completion of clusters of content or equivalent.

- Several popular webinars and courses are returning in Q2, including *Creating Anti-Racist Storytimes: Activism, Belonging, and Change*, the *Public Library Director Crash Course*, *American Sign Language for Librarians*, and *Leadership for School Librarians*.
- New events include the Advanced eCourse *360° Marketing—A New Approach for Modern Library Work*, *Library Services for Blind and Visually Impaired Patrons*, and the *Human Resources Crash Course for Library Managers*.
- We will work with MRS to continue offering free events.
- We will incorporate Roundtable events into the new site.
- We will standardize pricing for on-demand events and bundling on-demand products together.
- As ALA Staff return to our physical office space in Chicago, we will lead the integration into our new webinar rooms, which will provide staff with the ability to run studio quality webinars and create podcasts.

## CORE

**Division Executive Director:** Kerry Ward

**Budget Amount:** Approx. \$1M

**# of Staff:** 5

### Status Report on Pivot Strategy Aligned Unit Goals, attached for Reference:

In Fall 2021, Core created the following plan, integrating the ALA Pivot Strategy), the [Core Strategic Action Goals \(blue\)](#), adopted by the Board in June 2021, and [the unit operational goals \(red\)](#) developed by staff over spring/summer 2021. Each Core goal is also linked to the value(s) we adopted with the formation of Core.

### ALA Pivot Strategy Impact Stream: MEMBERSHIP

#### [Core Strategy Area: Membership and Engagement](#)

**Goal 1:** Core will provide a clear articulation of the value and benefits of membership, programs, and services, and will make participation in the division accessible to the widest possible array of library workers.

*Core Values:* Transparency; Sustainability; Inclusion

#### **Actions:**

1. Refine the statement of Core's value and benefits to members to make these clear and visible to members. (*Board of Directors; Communications Coordination Committee*)
2. Develop a comprehensive mentoring program focused on supporting early career members that will serve as a model for establishing and implementing additional mentoring programs (e.g., new managers). (*Leadership Development and Mentoring Committee*)
3. Ensure that Core has an awards structure that celebrates excellence in iterative and ongoing work by individuals and teams. (*Awards & Scholarships Coordination Committee; Fundraising & Scholarships Committee*)
4. Develop a process and structure for issuing a quarterly report to members. (*Board of Directors, Exec Dir*)

**Goal 2:** Core will have a clear advocacy agenda and communications strategy that reflects Core values, supports its members, and is responsive to current issues in the profession.

*Core Values:* Diversity; Inclusion; Collaboration



**Actions:**

1. Refine the charge for a new Advocacy Coordination Committee that clearly defines the scope of what advocacy means within Core (e.g., legislative advocacy; social justice; the rights and well-being of library workers). (*Board of Directors; Advocacy Coordination Committee*)
2. Build an advocacy strategy against which proposals, initiatives, requests for advocacy action, and our investments are evaluated, resources are allocated, and partnerships and relationships are developed across other divisions and groups within ALA that are also engaged in advocacy work (e.g., ALA Washington Office; ALA Allied Professional Association). (*Advocacy Coordination Committee*)

**Unit Goal 1: Core personal membership will increase by at least 2% in FY22, based on the final FY21 membership report.**

**Operational:**

1. Every member not in a section group already will be invited to join at least one section, interest group, or committee
2. Every non-member registrant for Core CE will be invited to become a member
3. An onboarding process for every new member will be developed and implemented

**Unit Goal 2: Core will integrate EDI data, tracking, and reporting across all unit goals and projects.**

**Operational:**

1. Determine baseline engagement of BIPOC and people from underrepresented groups, and Core.
2. Analyze FY21 data on membership, volunteers, authors, and presenters, etc.
3. Analyze Core communication channels for reach and inclusion

**ALA Pivot Strategy Impact Stream: CONTINUING EDUCATION**

**Core Strategy Area: Continuing Education**

**Goal 1:** As a complement to formalized content managed through the Core Continuing Education Committee and staff, Core will investigate and implement low barrier means for members to propose and deliver programming.

*Core Values:* Knowledge Sharing; Innovation; Collaboration

**Actions:**

1. Explore emerging trends and training needs in areas of interest throughout the division. (*Section Leaders*)
2. Provide regular sessions on “How To” propose and execute programming to better encourage proposals from members. (*program, CE, publications*)

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

**Operational:**

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

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

Core is beginning its second year as a division. The absolute focus will be on providing member value by fulfilling the commitments we made to members when we asked them to vote for innovation, career development, and community in a new division. The roadmap for that will be the above action plan.

The clearest trend is also our biggest unit concern: the membership decline impacting ALA, most divisions, and Core. Based on Membership reporting, ALA ended FY21 (August 31) with 49,727 members, an 8% decline from FY20 and an 11% decline from FY19. Core membership ended at 5,124, far below what was budgeted for our startup year. Part of this is related to members of the former three divisions struggling to find their places in the new division, and staff has worked to make those connections. Part is also related to ALA's declining numbers. Looking at Core statistics, only a small percentage of former Core members are still members of ALA; the vast majority of our former members have left ALA completely.

In FY22, the key question will be how to re-engage members/former members/non-members as we transition from pandemic to endemic. How do we provide value in a complex, nearly 150-year-old organization? Core members feel part of that answer lies in operational excellence, and they strongly support Forward Together (governance/organizational restructuring), the Pivot Plan (operational/goal alignment) and early discussions for a new operating agreement (financial alignment). These three projects are the blueprint for a more member-engaged, financially sound ALA. We view them as interlocking, so the failure of any one piece will doom transformational organizational change. In that event, ALA will likely lurch back into financial crisis, relying on endowment transfers, short term borrowing, disinvestment in IT, and staff cuts to finance the final decade of the association.

**# of Members:** 5,124 as of August 31

**# of Members/non-members/other stakeholders reached during quarter ending November 2021, for Core CE:**

Produced:

- 6 courses
- 10 webinars

Reaching approximately:

- 275 individuals
- 25 groups (representing many hundreds more participants)

\*We note that we are reaching a wide audience but are seeing lower than budgeted webinar revenue.

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

Core is in its transitional year, so activities, except for CE, are focused on the operational ramp up of the division:

- Launched webinar recording archive: <https://connect.ala.org/core/find/free-recordings>
- New section pages went live (example): <https://connect.ala.org/core/communities/all-core-groups/core-sections/metadata-collections>
- The Core Reading Club launched in September
- Created groups/infrastructure for 3 additional awards committees
- Worked with ALA to get our sections on the membership join/renew form, which should support engagement
- A short Open Access week donations campaign was implemented
- Developed new automated messaging for members, i.e., anniversaries, dropped members, etc.

- A new member group, Academic Interviews Project Team, delivered their report in December: [Best Practices for Academic Interviews](#)
- A new member group, the Authentication Project Team, delivered their report in December for Board review.

#### Select Future Activities and Events:

- The 2021 Core Forum in Baltimore was canceled due to Covid. We are in the process of looking for a new date and location for 2022.

## DEVELOPMENT

**Unit Manager:** Tracie Hall/Anne Manly

**Budget Amount (Overall Revenue/Expense):** \$3,800,000

**# of Staff:** 3

**Revenue Stream or Division:**

☒ Contributed Revenue

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

Development manages individual, corporate, and foundation donations, processes gifts and stewards member relations, provides inter-unit and association-wide support, conducts campaigns, and promotes the culture of philanthropy within ALA.

#### Institutional Giving

- Development is actively involved in discussions with corporate and foundation donors. Although promising, these discussions are on-going and specific reporting would be pre-mature at this time. However, if successful, these opportunities could result in significant progress towards Development's goal of \$3,800,000 in contributed revenue for FY22. Thus far in FY22, ALA has raised \$430,000 in contributed revenue, with an additional \$1M pending at the end of the quarter.

#### Individual Giving

- Individual-Giving inquiries have increased, representing a very wide range of giving levels. Development staff continues to exercise greater expertise in this area and will report on these inquiries as they become finalized.
- ALA's partnership with FreeWill has resulted in \$87,500 bequests to ALA, against a cost of \$10,000.
- The Development office supported Executive Director Tracie Hall and CMO in ALA's Giving Tuesday campaign. We are pleased to report that when final numbers are analyzed, it is likely ALA will have doubled last year's Giving Tuesday results. Last year ALA raised \$14,516 on the day of Giving Tuesday and \$23,684 for the total of the week before and week after. This year's campaign raised \$31,045 on Giving Tuesday alone.
- Development supported PAG, ALA President Wong, and ALA Executive Director Hall in the Fall Stewardship Gathering. Nearly 60 people attended this event which celebrated ALA donors and community.

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

ALA continues to track opportunities to expand support for its work in the area of digital access and equity; accessibility; early and adult literacy; workforce development; public health access and guards against misinformation; intellectual freedom protections; diversification in LIS services and the LIS workforce; etc. Additional trends that Anne Manley has cited follow:

**Nearly Half of Higher-Education Fundraisers Now Have Hybrid Work Arrangements.** Just 15 percent of gift officers and alumni-relations staff members said they were working remotely all or most of the time. Hybrid work is now the most popular arrangement: 67 percent said they preferred to split their working hours between the office and a remote site. Sixty-three percent of leaders of fundraising teams said they allowed their employees to decide for themselves whether they'd like a hybrid work schedule. Thirty-four percent said they strongly encouraged their fundraisers to return to the office. What has remained clear over the past four surveys is frontline fundraisers' distaste for working in the office full time. In September 2020, 13 percent wanted to work exclusively from the office. In January and May 2021, in-office work gained some popularity, with 17 percent saying they preferred it. Now, however, just 8 percent of frontline fundraisers say they'd like to return to office work full time. When asked where they were most productive, only 11 percent said the office.

**AAP, Native American communities underfunded.** Asian-American and Pacific Islander (AAP) and Native American nonprofits and communities are underfunded. The nonprofit leaders interviewed for the studies recounted interactions with funders characterized by a lack of understanding of their communities and described misconceptions and harmful stereotypes about their communities that made it more difficult for them to obtain funding. Over the past two years, Pacific Islanders have suffered one of the highest death tolls in the United States, Asian American-owned small businesses have lost business as a result of discrimination, and crimes targeting people of AAP descent have risen significantly. Yet only 10 percent of foundation leaders said they provided a large or moderate percentage of their grant dollars to organizations serving Asian-American communities. In 2020, 71 percent of AAP nonprofits reported receiving no new foundation funding. Similarly, Native American communities, despite having been disproportionately impacted by the pandemic — suffering the highest rates of hospitalization and deaths from COVID-19 and a devastating blow to their economies — have largely been overlooked by funders. Only 11 percent of foundation leaders reported providing a large or moderate percentage of their grant dollars to Native American communities, and 67 percent of nonprofit leaders reported receiving no new foundation funding in 2020.

**# of Members/non-members/other stakeholders reached during quarter: 40,000**

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

- Development has supported the creation of a summer and fall stewardship event hosted by the Philanthropic Advisory Group as a means to acknowledge and engage ALA donors and stakeholders. Over fifty individuals attended the last such program in the fall.
- Development has made a practice of incorporating Membership support into most conversations with funders. Currently, Development is discussing mutual membership sharing agreements with three funders. Development is working closely with MRS to develop membership options and with Conference Services to develop a plan to convert more vendors into Library Champions.
- Development team member Remigio Torres continues to work closely with F&A on gift processing and the audit and often serves as the face of ALA when dealing with donor complaints. Development has received several compliments regarding his interactions with donors.

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

- October 6, 2021, Fall Stewardship Gathering
- Giving Tuesday campaign
- End of Year mailing
- Updating Impact Report
- Managed Library Champion program – pleased to announce that 2 new members joined at the Investor (\$10,000) level
- Staff Liaison to Philanthropic Advisory Group; including support of PAG nomination process
- Engaged with over a dozen individuals regarding current and future gifts
- Engaged with over 4 dozen corporate or foundation funders regarding past, current and potential grants, including initial discussions, proposals, final reports, and renewals
- Worked towards updating GuideStar profile to Premium status
- Participated in Cross Functional team and Revenue Generating Business owner's activities
- Participated in Chicago Digital Inclusion and Chicago Literacy Alliance discussions with external partners
- Worked with IT to update one click donation function
- Managed requirements of Mellon Foundation and other grants
- Supported other Units in funder prospecting, grant writing, and reporting
- Interviewed and assisted with on-boarding of Mellon-funded Data Fellow candidates
- Managed FreeWill relationship and promotion
- Supported and advised Roundtable fundraising effort
- Researched and investigated fundraising and data management consultants
- Spotted and mitigated erroneous charge incidents

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

Development is especially looking forward to the following future activities and events:

- Recognizing that other organizations in the field sometimes take credit for ALA accomplishments, Development is looking forward to working with CMO to create campaigns around National Library Week, Banned Books week and other ALA programs and accomplishments so that ALA is properly recognized and rewarded for its efforts.
- Achieving a Premium Status GuideStar rating and exploring how that may enhance individual giving.
- Continued efforts towards meeting Individual, Corporate and Foundation giving goals.
- Ongoing support of the Philanthropic Advisory Group's event and meeting planning.

**FINANCE AND ACCOUNTING**

**Unit Manager:** Dina Tsourdinis

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

**# of Staff:** 7 (FT), 1 temp

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

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

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

Streamline the close process: Beginning in FY 2021, the department moved to a quarterly reporting schedule. This will provide more efficiency in the close process. The quarterly reporting is also being adopted by the Membership Department for consistent practice across ALA.

Cross-training: Due to our limited success with cross-training, we have hired a consultant for an Accounts Receivable project to accomplish the following objectives:

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.

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.

We continue to explore new ways of working to find a solution. Even through 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 make sure the work continues. This will also provide for continuous workflow when there is turnover amongst staff members and when there are unanticipated absences.

In November 2021, we were successful in hiring an Accounts Payable Manager. We are working to onboard her so that she has a successful start.

In addition, we are building our bench and work that has historically been performed by Accounting staff is being performed by other staff that possess the required skillset.

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

- Stabilizing staffing in the Accounting Department: Turnover in the department has made it difficult to gain traction to catch up on the financial reporting needs of the Association.
- Assisting the Publishing Department and CE Unit with the transition to new fulfillment partners.

**# of Members/non-members/other stakeholders reached during quarter:** Approximately 300.

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

ALA's search for a new CFO was successfully completed with the hiring of Dina Tsourdinis who brings more than two decades of CFO-level experience at educational and non-profit institutions, and a BA and MA, as well as instructional experience in Accounting to her new role.

The department worked with the Small Business Administration to provide documentation to support forgiveness of the \$2,000,000 Paycheck Protection Program loan. The loan was forgiven in its entirety on November 22, 2021.

The department worked with the Small Business Administration to request an increase in the Economic Injury Disaster loan. The Association received approval of a loan increase to \$2,000,000 on October 30, 2021. The loan is due in 30 years and bears interest at 2.75%. The Association will continue to seek opportunities for loans with favorable terms (long-term and low interest rate).

The department has prepared a financial reporting timeline for year-end reporting and audit work. This timeline is close to returning the Association to a pre-pandemic timeline for audit report presentation to the Finance and Audit Subcommittee. The FY 2021 draft audit report will be presented to the Finance and Audit Subcommittee for approval by the auditors on February 2, 2022.

The department relaunched the Budget Presentations. The participation of all ALA staff will aid in breaking down silos and help in creating an open, inclusive work environment. Sharing information on the budget building and monitoring process with all ALA staff helps them to understand the important role they play in implementing the Pivot Strategy. The relaunch was successful, and the department will be building upon this success to host the FY 2023 Budget Presentations from March 1-3, 2022.

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

- Rebuilding the Finance and Accounting team

## **GOVERNANCE OFFICE**

**Unit Manager:** Sheryl Reyes

**Budget Amount (Overall Revenue/Expense):** Governance Office budget is \$470,000 (expenses)

**# of Staff:** 4

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

☒ Membership

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

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

Staff conducted a review of the current Affiliate program, benefits, and fees to ensure the program and services are still relevant, valued, and sustainable. Benefits and fees remained relatively unchanged since the infancy of the Affiliate program, so this was a valuable exercise as we look to increase membership and strengthen relationships. A survey was sent to Affiliates in December 2020, and we received an 85% response rate.

The next step is to brainstorm with the Affiliates on how to facilitate a reciprocal relationship. The goal is to create stronger relationships, which in turn will help increase membership. President-elect Wong agreed to

support this initiative and champion this effort. The first discussion with the Affiliates is scheduled on Thursday, December 2, 2021.

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

The inaugural Virtual Volunteer Fair concluded, and evaluation results were favorable. The immediate goal is to bring awareness and visibility for members with a fuller picture of the volunteer opportunities available at ALA. Execution of a 2<sup>nd</sup> Virtual Volunteer Fair is planned for 2022. Other related projects intended to increase the member leader pipeline are to improve the volunteer web presence, develop a crosswalk of volunteer opportunities organization-wide, and update the staff liaison handbook.

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

A variety of projects are underway to streamline programs in the Governance Office. Staff is looking at the volunteer engagement cycle, how to execute and facilitate hybrid governance meetings, and modernizing our ALA bylaws.

**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 Executive Board Fall Meetings (October 29-31, 2021) provided the first opportunity to test and exercise tech equipment and space in the new ALA Headquarters Office. Given the meeting space requirements within social distancing guidelines, we reserved another space in the building separate from the 13<sup>th</sup> floor. There were fiscal implications as the expenses to accommodate this new space (i.e., cost of projector, HVAC, and cleaning services) were not originally budgeted. Since both the Board and Council are now meeting virtually in January 2022, the cost savings from moving to a virtual meeting will help alleviate the expenses incurred in the Fall.

**Narrative Description Members/non-members/other stakeholder engagement:** Governance activities have spanned ALA general membership through the Volunteer Fair as well as intensive communications in support of TAG and other governance activities currently underway.

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

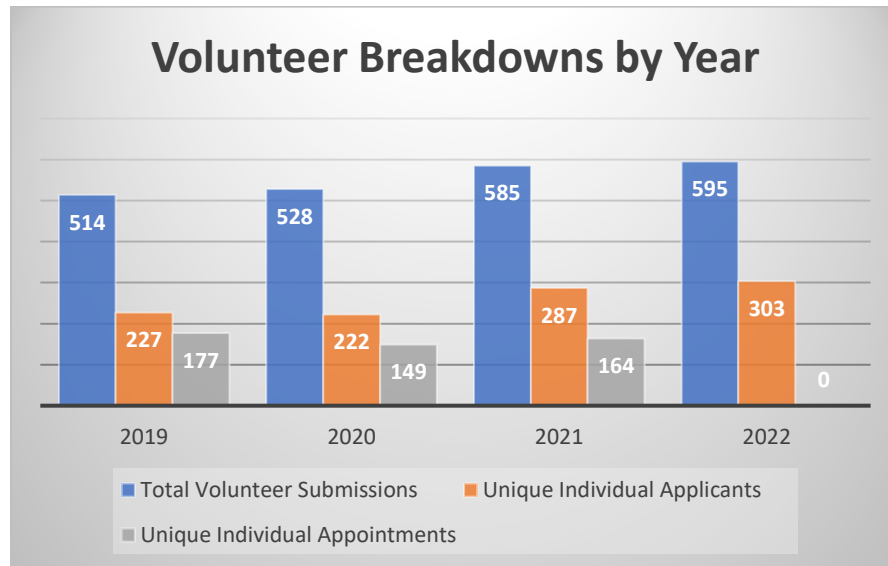
#### Virtual Volunteer Fair

The inaugural Virtual Volunteer Fair was held on September 14, 2021. This engagement opportunity was held for ALA members to learn more about the different ALA volunteer opportunities organization wide from ALA and Council Committees to Divisions and Round Tables. Based on the evaluation survey, attendees rated this program 3.53 (out of a 5.0) scale. For the 2022 Virtual Volunteer Fair, Governance will work to increase the satisfaction rate and its promotional efforts.

#### Volunteer Application and Appointments

The deadline for members to submit their ALA and Council Committee volunteer applications was September 30, 2021. We received a total of 595 application submissions. 303 of those are from unique individuals. Below is a breakdown of volunteer submissions and appointments since 2019. We received slightly higher volunteer applications from previous years. President-elect Pelayo-Lozada will be working with committees and Governance staff in making appointments for the 2021-2022 committee year.





#### Fall Executive Board Meeting – October 29-31, 2021

The ALA Governance Staff held the first ever hybrid ALA Executive Board Meetings at the ALA Headquarters Office. All Executive Board members were physically present while observers and presenters logged-in virtually. Coordination and execution of this meeting entailed significant work from Governance, IT, and building staff. ALA Executive Board members were pleased and appreciated the work to facilitate a productive meeting.

#### Election Vendor

A subgroup of Staff Election Administrators and Information Technology (IT) sent a request for proposals to election vendors so that ALA can assess functionality and price. The goal is to streamline processes and improve the member user experience all while doing so at a reasonable cost. After receiving RFPs during the summer and reviewing demos during the Fall with staff & member leaders (IT Advisory Committee, Election Committee, and board members), the subgroup is bringing forward two options to the Staff Election Administrators: (a) staying with our current vendor or (b) going with an entirely new vendor. Staff Election Administrators were provided the resources and materials to make an informed decision (demo recordings from both vendors, proposals, and the ability to test the new vendor's system). The goal was to provide a recommendation before the end of the calendar year 2021, which was accomplished.

#### Governance Meetings

The ALA Governance Office along with Conference Services created draft skeleton schedules for the Library Learning Experience (LibLearnX - January 2021 event) and Annual Conference (June 2022). The Board approved both skeleton schedules, and staff is working towards preparing for those meetings. For more information on governance events, visit the newly created Governance Meeting webpage: <https://www.ala.org/aboutala/ala-governance-meetings>

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

- The ALA Governance Staff is working to prepare for the upcoming virtual governance meetings scheduled for January 2022.
- Preparation for the Virtual Presidential Forum, which has been traditionally scheduled during January is now pushed to February in hopes for better member attendance and engagement. This will be the first virtual forum where we have both President and Treasurer candidates participating.

- Election Activities will start to ramp up as staff begin preparations for the Spring 2022 web ballot.
- The work of the Transforming ALA Governance task force will conclude in January/February with a set plan to execute in the upcoming months.

## INFORMATION TECHNOLOGY

**Unit Manager:** Sherri Vanyek

**Budget Amount(Overall Revenue/Expense):** \$3,578,368

**# of Staff:** 9 (7 staff positions filled and 2 vacancies)

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

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

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

**ALA Technology FY21 Projects Continued:**

- Assist with the New Continuing Education Learning Management/eCommerce System Implementation
- Continue to upgrade Shibboleth Single Sign-On Software to the remaining websites
- Continue with the final phase of implementation of eStore shopping cart integration with the new fulfillment vendor Chicago Distribution Center (CDC)
- Continue the migration of 75 of 100+ blogs to the cloud
- Continue to monitor revenue and membership goals by creating new dashboards

**Technology Initiatives for FY22:**

- Hire a new Chief Information Technology Officer
- Hire a Systems Software Specialist to support project execution
- Upgrade the iMIS Membership System
- Clean up data in the iMIS membership database
- Continue to monitor revenue and membership goals
- Work with all revenue generating units to identify and establish new revenue products or services
- Hire a consultant for the Data Center As a Service Design
- Hire a consultant for a new Website Strategy
- Drupal Web Content Management System Upgrades

**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 seven 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 received additional investment dollars in FY2022 to hire a Chief Information Technology Officer and to fund project work. IT is still searching for a Systems Software Specialist to support project execution. These resources are needed to meet the association's major goals for FY2022.

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

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

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

- Rollout new VPN technology for remote access to our systems for staff
- Assisted with the launch of the new Continuing Education website on November 10<sup>th</sup> at <https://elearning.ala.org>
- Worked on a new anonymous donation form that is integrated to the iMIS membership system for February 2022
- Worked on preparing technology for staff Return To Office (RTO) in January 2022

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

- Hire a new Chief Information Technology Officer
- Hire a Systems Software Specialist to support project execution
- Upgrade the iMIS Membership System
- Clean up data in the iMIS membership database
- Continue to monitor revenue and membership goals
- Work with all revenue generating units to identify and establish new revenue products or services
- Hire a consultant for the Data Center As a Service Design
- Hire a consultant for a new Website Strategy
- Drupal Web Content Management System Upgrade

**INTERNATIONAL RELATIONS OFFICE**

**Unit Manager:** Michael Dowling

**Budget Amount (Overall Revenue/Expense):** \$264,083

**# of Staff:** 1.5

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

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

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

Conference Services

- Organized, with partners, the 8<sup>th</sup> Sharjah International Conference Nov 9-11 that included Librarian of Congress, ALA President, Immediate Past President, and Executive Director. There were 223 registrants from 17 countries. This total was less than previous years due to the pandemic. Live streaming of the keynotes reached close another 400 virtually.
- In addition to the Sharjah Conference, IRO and the Sharjah Book Authority, created the National Libraries Summit that was held Nov 8-9. Despite the inability of some national library leaders to attend due to the pandemic, representatives from 19 national libraries participated. Six each from Africa, Europe and the MENA Region, and Dr. Carla Hayden from the Library of Congress in North America) The four topics of the Summit were: Visibility; Engagement; Impact; and Collaboration. The Summit allowed ALA to increase its contacts with national libraries.

Continuing Education

- Organized the 21st ALA-FIL Free Pass Program to the Guadalajara Book Fair at end of November after not being able to offer it in 2020. Though the number of ALA member participants was much lower than in pre-pandemic years, with only 40 instead of the usual 150, it was a good turnout and a start of a return. Those attending found a safe environment and reported being able to find new books and other resources for their libraries. To assist the members a pre-travel webinar and on-site orientation were held. ALA Immediate Past-President Julius Jefferson and Executive Board Member Eboni Henry represented ALA.
- Two international focused webinars were presented. In October *Gigabit Libraries and Beyond: Improving Broadband Access Worldwide* attracted 85 registrants and *Truth and Reconciliation: Decolonizing Approaches Within Social Memory institutions* which had 479 registrants from around the globe. In November 199 registered for *Virtual International Connections: The Global Librarian Exchange Program*.

Contributed Revenue

Continued dialog with the U.S. State Department and new staff. Was able to connect them with Conference Services to get a booth at Annual in Washington, D.C.

The Development Office is seeking additional COVID relief grant funding for libraries to be potentially disseminated by CRO based on their previous track record of success in this area in FY21.

Membership

Continued to message ALA international members with opportunities from ALA over the quarter, including LibLearnX.

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

- International Cross Functional Team began meeting on it goals.
- Concern about pandemic variants and rise in cases may impact ability of international librarians to attend ALA Annual in Washington. D.C.

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

- Over 200 in-person and 400 virtually for Sharjah International Conference
- Leaders from national libraries (including the 33 from 19 countries that attended National Libraries Summit)
- 678 participants to international focused webinars.
- 40 members attended ALA-FIL Free Pass Program to Guadalajara Book Fair

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

- ALA's efforts in Sharjah and the Guadalajara Book Fair show that ALA is providing opportunities for librarians (members and non-members) to have an ALA conference experience outside the U.S., and to reinforce ALA's commitment to diversity of collections.

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

- Sharjah Conference revenue total will reach expected target of \$35,000
- National Libraries Summit started a new connection to this important segment of the international library community for ALA

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

- Intl Cross Functional Team will work on activities related to four goals.
- Promotion of ALA Annual Conference to international members and non-members.

## MEMBER RELATIONS & SERVICES

**Revenue Stream Manager:** Melissa Walling

**Budget Amount (Overall Revenue/Expense):** Revenue - \$4,434,592, Expense (\$904,163) and Net Revenue \$3,530,429

**# of Staff:** 8.5

**Revenue Stream or Division:**

☒ Membership

**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

The protracted pandemic and its impact on libraries and LIS staff have caused membership to remain at a decline when compared to previous years and ALA membership counts ended the fiscal year at 49,727. This was a projected decline due to the challenges of the pandemic and we ended the year with an 8% decline from FY20 and an 11% decline from FY19. This was a slight uptick from July which would follow our usual seasonal membership fluctuations.

One of the MRS activities this quarter was to activate the membership reinstatement/win back campaign. This was a key strategy to attempt to capture members lost during the pandemic. This initiative has resulted in \$60,000 in dues revenue and converted 4% of respondents to date which met our target. We considered this a learning campaign to see what messages and incentives resonated with our audience and will keep iterating the messages moving forward.

We were excited to begin work on our pilot programs including growing membership alongside ALA Chapters and ALA Affiliates. Foundational work began this quarter on these pilots, and we invited AzLA and DCALA to join us as chapter pilot participants.

**Pivot Plan Membership Goals (data at end of FY21):**

	<b>FY21 Final</b>	<b>FY21 Goal</b>	<b>Variance</b>	<b>FY25 Target</b>
<b>ALA Market Share*</b>	<b>14%</b>	<b>15%</b>	<b>(1%)</b>	<b>20%</b>
<b>Division Share of Membership</b>	<b>56%</b>	<b>65%</b>	<b>(9%)</b>	<b>75%</b>

*\*The market data was last updated in 2018 – and market data will shift over time:*

<https://www.ala.org/tools/libfactsheets/alalibraryfactsheet02>

**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:**

We focused last quarter on analyzing key membership data and trends to determine how to prioritize efforts. We started by analyzing data from 2020/2021 when compared to 2008/2009 to look for trends during a downturn. 2008 is an important benchmark – this was not only ALA's highest membership count and pre-recession but also the number of members that we aspire to for pivot plan growth. We found that:

- Regular Member renewals were nearly 10,000 members lower on average than 2008. This trend was affirmed by the Avenue M research. Our number one priority for the upcoming year is recruitment and retention of library workers.
- New member acquisition is down approximately 20%. Operationalizing new member recruitment of non-member CE registrants, advocates and chapter/affiliate members will be a priority.

The MRS unit is using data to inform our decisions about campaigns and where we allocate resources. We are looking to work in collaboration with divisions and round table staff, as well as the Member Promotions Task Force, to align and amplify the resources available to us. We remain focused on identifying the non-member touch points within ALA and determining how we can encourage non-members to join, donate or engage.

**LMS Launch:**

The MRS team was highly engaged in the launch of the new LMS. Team resources were dedicated to testing the new software as well as setting up and transferring events. The new LMS is a great opportunity for the MRS team. First, it has proven to make event set up and event registration much easier which results in less customer inquiries. Secondly, it has allowed for our Registration & Membership Specialist, Tihuana Spells, to focus more on membership as we enter the busy season. Lastly, it has created an opportunity for more bundling and discounting and promoting membership to registrants. Since online CE engagement increased across most associations during the pandemic, engaging these individuals as potential members is an important strategy for growth.

### **Subscription Changes:**

At the beginning of FY22, there were a few changes to the subscriptions that the MRS team supports. A few titles will sunset at the end of this calendar year (and another one next year), which meant some updates to our internal and external processes. We also continue to engage in conversation with RDA about improving the payment application and renewal process that we support. MRS is trying to prioritize external customer service and minimize effort on payment application and financial processing.

### **Membership Cross Functional Team:**

The MRS team has been highly engaged with the work of cross functional teams across the organization and most staff are members of the first round of CFTs. The first goal of the Membership CFT is to conduct an ALA wide inventory of membership benefits to help inform membership messaging and our value proposition.

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

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

ALA membership counts ended FY21 at 49,727. This decline was lower than budgeted, and we anticipate these numbers to rebound in FY22 with a focused membership strategy, resuming in person events such as PLA and Annual Conferences, and an overall rebound of the economy. With 2/3 of ALA members paying dues from their own pocket, dues revenue is sensitive to economic conditions.

Division Membership counts ended the year at 40,400 and Round Table Membership counts at 17,723. With the dissolution of Four divisions at the start of FY21, it is difficult to benchmark Division membership year over year; however, Round Table Membership held steady when compared to FY20.

At the end of FY21, overall participation in Divisions and Round Tables reflects:

- 39% of members are only members of ALA
- 40% are part of a division only
- 5% are part of a round table only
- 16% are part of both a division and round table

Since FY19 when we last reviewed these numbers, we have had an increase of 3% of members without a Division or Round Table. This is an opportunity to highlight engagement as we know that members who have found a community within ALA are more likely to renew. The large number of Student Members with only an ALA membership is a priority. This is partially because the Joint Student Membership application is hosted outside of our dues e-commerce platform so they cannot join any groups when they join ALA. This is on the list of IT improvements.

## Describe the Most Impactful Unit Activities this Quarter:

### Membership Model:

ALA's Membership Committee presented a simplified membership model to ALA Executive Board which was approved on October 29, 2021. The Membership Committee has been working extensively over the past few years on a simplified membership model. In 2018, ALA contracted with a market research firm, Avenue M which presented five potential models to ALA. These five models were informed by the goals of creating a membership structure that will increase membership growth and market share and increase dues revenue for the organization. After review and deliberation, the Membership Committee is recommending a two-phase approach to ALA's membership model work:

- **Phase One:** Consolidate the eleven (11) membership categories into four (4) membership categories. The new model would roll out in FY24 (Executive Board, Council and Member Vote in early 2022) and would not change division or round table structures. FY23 will be needed to work on implementation and communication plans.
- **Phase Two:** Building upon Phase One, launch an "enhanced" membership package which will include a bundle of additional benefits. Examples of the bundled benefits may include a division membership, a round table membership and/or professional development offerings.

With the two-phase approach, the Membership Committee is focusing on the first goal of simplification with this consolidated model. We are also aiming to launch improved loyalty and flexibility options including monthly installment payments and auto-renewals. Phase Two will tackle the goal of personalization and flexibility.

### Timeline for Implementation:

Membership Committee approval	October 5, 2021
ALA Executive Board approval	October 29, 2021
Virtual conversations with Councilors to discuss model and address questions	November 2021-January 2022
Work with Policy Monitoring Committee and Constitution and Bylaws Committee on changes to ALA governing documents	November 2021-January 2022
ALA Council vote	January 2022
Member vote (if new model approved by Council)	Spring 2022
Implementation process with goal of completion by start of FY24 <ul style="list-style-type: none"> <li>• Integrate implementation costs into FY23 IT budget</li> <li>• Communication plan for new model</li> </ul>	Spring 2022-Summer 2023
New membership model goes live	September 1, 2023 (FY24)

Some of the Phase Two work is underway. The ALA Membership Committee will conduct a financial analysis on bundling including division membership, round table membership or online learning offering in Phase Two. With the implementation of the new Learning Management System and the corresponding price standardization, efforts are underway to start building a professional development bundle to be rolled out for FY24.

Phase Two work will expand to include consideration of division or round table memberships when some of the price standardization initiatives across the organization conclude and the financial analysis and technology requirements can be conducted. The recent action taken by Council ([ALA CD#46.1, Item #2 \(Roundtables\)](#)) lays the groundwork for Phase Two since it standardizes round table dues prices and is an example of the actions that will support this effort.

### 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 and Danielle Ponton, Program Manager, ALA Round Table on determining next steps for adoption and implementation. Currently, the RTCA Convenors are working closely with the Constitution & Bylaws Committee to discuss the resolution and ensure that round tables maintain a voice in making final decisions.

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

The second quarter of FY22 remains all about membership growth! Here are a few of our key priorities:

- **Membership Onboarding:** MRS will activate the virtual orientation for new members including a special orientation in conjunction with LibLearnX. This will be an opportunity to showcase the value of membership to new members.
- **LibLearnX:** As the first members-only conference, MRS is working closely with Conference Services and our Communications & Marketing Office to embed member acknowledgements and recognition throughout the event. We are also working with the Gaming Round Table to activate a series of escape rooms highlighting member value to accompany our membership booth.
- **Student Community on Connect:** A Student Members only community will be activated the first week of January 2022 to create an opportunity for Students to engage, network and connect with their peers. Conversation for the first month will be guided by volunteers from our Student Chapters.
- **Select and Onboard a Community Engagement Manager:** This position has been vacant since early Fall, and we are eager to welcome a new person into this position to continue to support engagement and increase the ability on Connect to foster a healthy member community.

#### **OFFICE FOR DIVERSITY, LITERACY AND OUTREACH SERVICES**

**Unit Manager:** Kevin Strowder

**Budget Amount (Overall Revenue/Expense):** \$415,646)

**# of Staff:** 3.5

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

☒Conference Services – primarily through our work with ALA member groups, the NALCos, and outreach affiliates, ABOS and ARSL, as the lead liaison for project engagement and conference support

☒Continuing Education – reflected in operating budget

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

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

#### **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.*

ALA and the National Associations of Librarians of Color (NALCos) continue to meet quarterly, establishing a culture of collaboration, and furthering our mutually beneficial relationship. We are projected to meet again in January 2022. The NALCos have met with ALA leadership, ODLOS, and Governance to outline responsibilities associated with the Advisory Committee for our Diversity Counts project and all agree that support of this initiative is pertinent to the field.

- *Strengthen the value proposition of ALA as a leading provider of Continuing Education on equity, diversity, and inclusion in FY22.*

In working toward this goal, we are meeting the demand for equity, diversity and inclusion trainings for library audiences and continuing to identify key impact stories from those trainings. Virtual sessions continue to thrive, and more than 14 workshops took place over the last quarter, facilitated by ODLOS and Chapter Relations.

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

The next stage of this goal is in motion. ODLOS staff, in partnership with leadership from MRS and CRO, have outlined the base expectations and benefits package to identify the quality of member experiences. We are also contributing to the surveying aspect that captured the resources ODLOS offers as member perks.

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

- ODLOS continues to respond to the need for developing professional EDISJ resources. Our Committee on Diversity and the Committee on Education supports this action. The Committee on Diversity created the [Diversity, Equity, and Inclusion \(DEI\) Scorecard for Library and Information Organizations](#). In order to cement the DEI Scorecard and expand its depth in the field, COD has moved to present this resource for review and support during the January 2022 Council meeting.
- The Committee on Education last worked to [update ALA's Core Competences](#) of Librarianship (ALACCs). As this resource is intended to be interpreted as a blueprint for developing curriculum, addressing operations standards, and guide library professionals to enhance program quality, the committee seeks to evaluate its reach. Due to internal shifts with staff capacity, the COE is no longer housed by ODLOS (as of October 2021) and will have representation from AOMR leadership.
- CSK Round Table process: The Coretta Scott King Book Awards has worked diligently with the support of ALA staff to meet the expectations of Council to become a Round Table. The Task Force established to draft, review, and distribute the E-petition has finalized the necessary documents for external support. After 52 years of operating under SRRT and EMIERT, CSK is close to cementing itself as an independent group in the ALA Book Awards community.

Next steps include:

- Review of feedback from COO and Council on necessary edits to E-Petition
- Notify CSK community about need for Letters of Support and signatures
- Present and engage in Q&A during Council meeting in January 2022
- CSK celebrates (if approved) new status as a Round Table at their Annual Breakfast at ALA Annual in Washington D.C. in June 2022

- The Committee on Literacy remains invested in updating and evaluating the quality of the [Literacy Clearinghouse](#), which holds several resources to enhance the literary efforts of librarians and the communities they serve. The most recent version is more robust and user friendly than before, highlighting the complexity of human-centered learning as it pertains to information access.
- 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. Some key areas of development center around the "Intersections in Libraries" or "Liberatory Design". Members also seek to explore the themes of disability, antisemitism, incarceration, and LGBTQIA issues.
- Interest Groups, inherited from ASGCLA (now defunct) remain an area of growth for ODLOS as we aim to reengage participants in the charge to action across the diverse member communities. At least three groups have yet to communicate or meet with intent to live out the charge from Council around their work. After numerous attempts to ignite action, not much has come to fruition. Discussion around consolidating the groups or potentially dissolving them with the support of governance have begun.

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

Members reached during quarter (committees, EDI Assembly, RTs, Interest Groups) = **5,164**

Combined members and non-members reached during quarter = **8,669**

(Note that there may be some overlap across groups, as this includes committees and round tables, for example.)

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

OLDOS remains in demand for Equity, Diversity, and Inclusion trainings. In partnership with CRO, we facilitated fifteen trainings during this quarter. These interactive and webinar-style trainings were presented across four library organizations: San Mateo County Libraries; HELIN (Higher Education Library Information Network) Library Consortium; Prairie Trails Public Library District and RAILS (Reaching Across Illinois Library System); and the Pennsylvania School Librarians Association. Over 300 people participated in live sessions, with more viewing webinar-style trainings.

In collaboration with the Office for Intellectual Freedom, and the Continuing Education Cross Functional Team, ODLOS has advised several groups on matters of language sensitivity and equitable education models. By reviewing curriculum and workshop facilitation guides, our mission to ensure literary tools meet the standards (with guidance from the DEI scorecard) adhere to the evolving nature of the field.

To enhance ALA membership, ODLOS has accepted speaking engagements to promote the office and build on our membership pipeline. This targeted outreach with MLIS students leverages momentum around our committee and volunteer opportunities. The EDI Assembly is marketed as a gateway for folks interested in getting in on the ground floor with EDISJ projects.

Lastly, ODLOS staff participated in a full day, in-person, Staff Retreat to establish an action plan that addresses the high-level Pivot Strategy goals for the office. Outcomes from this work allowed the team to redistribute responsibility, address the gap in staff as it related to the Spectrum program, closely monitor grants, and build community due to welcoming new leadership.

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

The Spectrum MLIS Program has continued to thrive in a unique state of transition and turnover. We have seen deep investment from leadership within the Spectrum Advisory Council as they continue to innovate on programming, navigate the digital divide, and maintain community with the scholars. All 61 scholars in this cohort are returning for another semester of their term, which means ODLOS is in the process of distributing the second round of financial packages. We have also seen an increase in current scholars seeking to get involved beyond the basic expectations of the program, and because of this SAC has established ways for them to volunteer around LLX events.

Early December marked the beginning of the review process to identify eight Fellows of Color to receive the Spectrum Doctoral Fellowship grant. This program, designed to elevate BIPOC individuals in the field of librarianship through financial support and intentional mentorship has garnered lots of traction. The informational session, which featured ALA's five partner schools and notable Alumni, pulled in over 75 attendees all interested in applying. In the coming months, our review jury will take a closer look at all complete applications and plan to notify those awarded in early to mid-March.

To ensure ODLOS stays ahead of the curve and leads the conversation around EDISJ, we developed an LLX Accelerator session focused on Inclusion. Our learning objectives push the importance of identifying gaps in process and realizing the responsibility that Librarians have when building resources, programming, and language to answer the needs of a community.

Maintaining strong connections with our Affiliate groups (NALCos) has been an area of growth when building out sustainable partnerships. Many units, including ODLOS, have partnered to determine what it means to restructure the membership packages available to our affiliates. With the direction of Governance and MRS, we were able to convene almost 90% of the affiliate representatives and talk through a visionary plan for a mutually beneficial relationship. ALA's suggestions were well received and created room for ODLOS to better identify how and when our affiliate groups can intentionally connect with the work of our office.

Creating a formal mentorship model for the Spectrum Program has been a work in progress for some time. Although scholars have access to the network and build relationships with Alumni, there is a need to sustain it. ODLOS and the Spectrum Advisory Committee began the process of developing a mentorship and volunteer strategy. In order to meet this goal, we are creating surveys and interest forms to house in a new database. Ideally this will result in scholars feeling a stronger sense of community and connection to the program for years to come.

A major goal of ALA and ODLOS has been to address the internal learning and external footprint regarding accessibility. Through Mellon donations, ODLOS has mapped out the plan to bring in an Accessibility Officer who will lead the charge of building the knowledge of ALA staff and direct the field on accessibility challenges.

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

Since 2012, the Diversity Counts (landscape scan of the LIS industry) initiative has been in major need of a refresher. ODLOS is delivering this critical data with support of demographers and analytical consultants. We are developing variations of the RFP's, meeting with potential partners, and building out a workplan. It's projected that we will have all materials prepared for distribution to members, Human Resources, and the Executive Board to provide feedback.

Upon completion of the Diversity Counts project, we move into the Longitudinal Study as an extension of the work. Still partnering with a consulting team, ODLOS will deliver a pertinent narrative that speaks to the ways in which the industry has yet to answer the call for establishing an inclusive environment for BIPOC success. Retention remains an issue for librarianship as it relates to a belonging environment for BIPOC. This report will give us the answers we need to create action.

The next stage of Continuing Education, provided by OLDOS is on the horizon. We see the value of pushing our target audience beyond the foundational EDI themes that exist and leverage new frameworks to anchor dialogue and keep ALA in position as a thought leader. The hope is to build two new versions by the end of the FY with a hard start in a few months.

Annual 2022 looks to welcome almost 200 scholars who will participate in the 2022 Spectrum Institute. This is a result of the pandemic and scholars from 2020 and 2021 not being able to connect in person. Knowing that this year will test the capacity of the staff, we are planning to start the planning process this quarter and map out the full experience by the beginning of Q2. SAC expects to use meetings around LLX to gain interest, ideas, and expectations from Spectrum attendees on how to enhance the event.

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

**Unit Manager:** Lorelle Swader, AED

**Budget Amount (Overall Revenue/Expense):** \$(185,362)

**# of Staff:** 2 (1.5 FTE) (shared .40 staff with the ALA-APA)

#### 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% above their projections for membership as of February.

##### Increase Revenue by 10% over Expenses

- Revenue is below budget, but expenses are also below.

#### 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 both Midwinter and Annual. This severely impairs the unit's ability to get the majority of its revenue.

**# of Members (for Divisions):** NMRT (1833)

**# of Members/non-members/other stakeholders reached during quarter:** Approximately 5000 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.

CE Online Courses Offered September – November 2021

- Fundraising & Grantsmanship
- Planning and Management of Library Buildings
- Organization and Personnel Management
- Library Marketing

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

Emerging Leaders Program Information

- The EL Working Group has selected **forty-nine (49)** people to participate in the 2022 class of Emerging Leaders (EL).
- This includes 13 people who work in academic libraries, 28 who work in public libraries, 7 work in schools, and 1 works in a special library.
- All but two, who work in Canada, work in the U.S.
- 65% of the participants are sponsored.
- The participants will work on 11 different projects.
- The Emerging Leaders program will kick off with a virtual day-long session during the ALA [LibLearnX: The Library Learning Experience](#) (LibLearnX) virtual event. Participants will continue in an online learning and networking environment for six months. The EL program culminates with a poster session where the EL will showcase the results of their project work during the ALA 2022 Annual Conference in Washington, D.C. this June.

ALA-Wide Scholarship Clearinghouse application collection

Support for NMRT online programs

Co-supported the development of the monthly *Library Worklife E-Newsletter* (with ALA-APA)

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

- Working with the Committee on Education (COE) to finalize the Core Competencies recommendations for Council.
- HRDR has hosted the following sessions:
  - Career Coaching, Jan 18 & 19, 2022; for LLX Sponsored by Placement & Career Development
  - Women in Librarianship and Their Role in Climate Change; will be part of LLX; Sponsored by COSWL
  - Saying No: Harassment Intervention at the Library; Dec 7, 2021; Sponsored by COSWL
  - Impact of the COVID-19 Pandemic on Salaries and Working Conditions in Libraries Jun 24, 2021; Sponsored by COSWL
  - Career Coaching, June 16 & 17, 2021; Sponsored by Placement & Career Development
  - Library Career Alternatives: How to Market Your Transferable Skills; Jun 26, 2021; Sponsored by Placement & Career Development
  - Ask HR; Jun 26, 2021; Sponsored by Placement & Career Development
  - Mentoring-on-the-Fly; June 28 & 29, 2021; Sponsored by Placement & Career Development

- Job Fair; June 27, 2021; Sponsored by Placement & Career Development

## OFFICE FOR INTELLECTUAL FREEDOM

**Unit Manager:** Deborah Caldwell-Stone

**Budget Amount:** \$359,538)

**# Of Staff:** 2 (with 2 vacant positions)

Revenue Stream(s) the Unit Supports:

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

### Status Report on Pivot Strategy Aligned Unit Goals

The Office for Intellectual Freedom continues to evaluate its ongoing initiatives for effectiveness and value, seeking to improve or eliminate existing initiatives and identify opportunities for new initiatives that will better serve member needs. In alignment with its unit goals for FY 22, OIF staff will begin to design and implement tools to follow up with those individuals or institutions using OIF's challenge support or consultation services, as a means of evaluating delivery of services as well as sharing messaging promoting the value of ALA membership.

The ongoing initiative to end "Choose Privacy Week" and consolidate online member resources addressing user privacy into one source site is nearly concluded. The new [Privacy Field Guides](#) and the resources imported from the old Choose Privacy website are now available as part of the "[Privacy](#)" topic pages located in the issues and advocacy area of the ALA website.

### **Opportunities and Challenges**

Throughout the fall the two staff members of the Office for Intellectual Freedom assisted members, library workers, and educators who sought help with the record number of book and materials challenges tied to ongoing censorship campaigns led by conservative advocacy groups. OIF staff provided confidential counsel in 275 cases, consulting on policy and procedure, providing legal information related to case law and legislation, and sharing information about challenged titles.

The groups targeting books in school library collections also began to challenge the same titles in public libraries, focusing on materials, displays, and programming reflecting LGBTQIA+ concerns and experiences as well as books and resources addressing the history of racism and slavery in the United States and the lived experiences of Black, Indigenous, and persons of color. Elected officials in a number of states issued statements supporting the censorship of diverse books and promised to initiate legislation or agency actions designed to suppress or censor books based on the false claim that such works were subversive or harmful to minors. That same false claim fueled efforts by a number of individuals and groups to file charges with local law enforcement, asserting that librarians and libraries violated law by providing access to such works. To date prosecutors have refused to pursue these complaints.

While the provision of services to members, library workers, and educators took priority, the campaign to censor library collections provided several opportunities for OIF staff to share messaging about ALA's support for students' and library users' intellectual freedom, its opposition to censorship, and the importance of, and need for, diverse books that amplify

the voices of historically marginalized groups. Based on data maintained by ALA's Communications and Marketing Office, OIF Director Deborah Caldwell-Stone provided information to 42 national and local newsgroups, including [The Guardian](#), [Chicago Tonight](#), [NBC.com](#), [Washington Post](#), [Yahoo News](#), [CNN.com](#), [NPR](#), [TIME](#), [New York Times](#), [Dallas Morning News](#), and others.

### **Member Outreach and Engagement (09/01/21 – 11/30/21):**

- **Public Challenges and Challenge Support**
  - 330 unique cases reported to OIF in the three-month period between September 1 and November 30
    - In 2020, with pandemic closures, 156 unique cases were reported to OIF for the entire year
    - In 2019, 377 unique cases were reported to OIF for the entire year
  - OIF provided direct support in 275 cases
    - 274 book challenges, 8 program challenges, 3 display challenges, and 45 "other" challenges (including student publications, reading lists, and First Amendment audits). (Note that a case or challenge can include multiple titles or items.)
  - Notable Challenges:
    - Central York School District (PA): Year-long "freeze" on 300 books, articles and documentaries created by primarily BIPOC authors recommended for use as part of the schools' diversity curriculum.
    - The Elmbrook School District (WI): The district administration suspended the books "Queer" and "This Book Is Gay" from its middle school libraries and Sora app after receiving a demand for removal from a conservative legal organization.
    - Campbell County Public Library, WY: A local church's pastor filed a criminal complaint against the library and its staff, claiming that several books in the library's young adult and children's collection addressing LGBTQIA themes and sexual health are obscene and inappropriate for minors.
- Intellectual Freedom News: 2398 primary subscribers reached weekly
- Intellectual Freedom Blog: 911 subscribers; 54 posts; total views: 131,910 (80% increase from last quarter)
  - Leading Posts by Page View (October snapshot)
    - [2020 Banned & Challenged Books List](#) - 17,460 views
    - [A Note from Jerry Craft](#) - 15,549 views
    - [Lawn Boy and Gender Queer: The Trend Toward Book Challenges](#) - 7,738 views
    - [Auditing the First Amendment at Your Public Library](#) - 5,870 views
- **Intellectual Freedom Round Table (IFRT) Activities**
  - September 22: IFRT Fall All Member Gathering
  - December 9: IFRT Reads: When Education Standards Stereotype, Marginalize, and Eliminate Indigenous Peoples
- **Social Media**
  - Twitter: From September 1 to December 1, tweets from the ALA Office for Intellectual Freedom Twitter profiles, including Banned Books Week, garnered 664,002 impressions, 15,331 engagements and 2,868 post links, with a gain of 539 net followers. The top tweet for the period promoted and linked to the OIF blog post, [A Note from Jerry Craft](#).
  - Facebook: From September 1 to December 1, OIF's Facebook pages attracted 1,173,848 impressions 7,059 engagements and 16,040 post links, with significant growth in engagement over the past quarter, reflecting the increased engagement associated with Banned Books Week.



### **Additional Advocacy, Education and Outreach:**

- Director Deborah Caldwell-Stone
  - ALA Legislative Summit for State Chapters and Member Leaders, 10/16/2021 (Sponsored by the Public Policy and Advocacy Office and the Office for Intellectual Freedom)
  - "After Banned Books Week: Intellectual Freedom Programming Throughout the Year," AASL National Conference, 10/23/2021
  - Trustee Training, Grand Marais Public Library, 11/03/2021
  - "Intellectual Freedom Update: Audits, Challenges, Legislation," New Hampshire Library Association 11/04/2021
  - "Censorship/Challenges in Texas Libraries," Partners Library Action Network, November 18, 2021
  - "Managing and Addressing Book Challenges in Your Community: Law, Policy, Advocacy," Freedom to Read Foundation, 12/09/2021
  - United for Libraries' Learning Live: Building Strong Library Policies, 12/14/2021
- Assistant Director Kristin Pekoll
  - ALA Legislative Summit for State Chapters and Member Leaders, 10/16/2021 (Sponsored by the Public Policy and Advocacy Office and the Office for Intellectual Freedom)
  - "After Banned Books Week: Intellectual Freedom Programming Throughout the Year," AASL National Conference, 10/23/2021
  - AASL Town Hall: Book Challenges, 12/08/21
  - "Managing and Addressing Book Challenges in Your Community: Law, Policy, Advocacy," Freedom to Read Foundation, 12/09/2021
  - "Prepare to Defend Your Comics/Graphic Novels/Manga and Anime," C2E2 ComicCon, 12/13/2021

### **OIF's Most Impactful Unit Activities this Quarter**

Working with the Executive Board, Public Policy and Advocacy Office, and the Communications and Marketing Office to draft and publish a public position statement addressing the coordinated campaign to censor diverse materials in school and public libraries. The ALA Executive Board approved the [Statement on Book Censorship](#) on November 29, 2021, supporting those libraries and library workers working to defend students' and library users' freedom to read across the United States.

In October 2021, with the support of ALA's Executive Board, OIF and the Public Policy and Advocacy Office convened a state legislative summit to examine adverse trends in state legislation that threaten libraries, library workers, or the ability of patrons to freely access information, and determine a course of action that leverages the full strength of the library ecosystem in responding to those trends. In early January, OIF and PPA released the [State Legislative Toolkit](#), a public-facing resource with member access to sensitive or proprietary information. The toolkit will continue to evolve based on member feedback and legislative activity.

### **Future Activities and Events**

- "Conducting a Privacy Audit," ALA E-Learning featuring IFC Privacy Committee Chair Erin Berman, the Division Director of the Learning Group for the Alameda County (CA) Library and Julie Oborny, Web Librarian for San José Public Library, January 12, 2022.

## OFFICE FOR ACCREDITATION

**Unit Manager:** Karen O'Brien

**Budget Amount(Overall Revenue/Expense):** \$252,026

**# of Staff:** 2

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

☒ Continuing Education

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

- 1) Ensure quality and expansion of available ALA-accredited degree programs

Fee revenue generating programs:

- Currently accredit 67 programs in 63 institutions
- In Candidacy for Initial ALA accredited status 2 programs: Old Dominion (visit Fall 2021, CoA decision January 2022); University College London, UK (visit Spring 2024, CoA decision June 2024)
- In Precandidacy status 2 programs: University of Central Missouri and Middle Tennessee State

Office for Accreditation coordinates AASL recognition of programs preparing teacher librarians through the Council on Accreditation of Educator Preparation (CAEP, pronounced "cape"). An AASL task force is considering the viability of conducting recognition reviews through ALA as a revenue source, bypassing CAEP as colleges of education are leaving CAEP.

- 2) Provide [Directory of ALA-Accredited programs](#)
- 3) Revenue increased by 5% in FY22 to support ALA's goals of managing expenses and increasing overall revenue.
- 4) Report trended statistical data on enrollment, completions, and student diversity in support of ALA's goals published [report](#) [Excel]
- 5) Revising Standards to reflect the state of the expanding field, ALA's core values, and the urgency to broaden equity, diversity, and inclusion in LIS education and libraries. The Committee on Accreditation Subcommittee on Standards Review has developed a Standards review plan.
- 6) Working in collaboration with the ALA Council Committee on Education on its revision of the Core Competencies.

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

Training program reviewers to conduct reviews effectively in virtual and in-person mode for the foreseeable future.

**# of Members/non-members/other stakeholders reached during quarter:** 415

**Narrative Description Members/non-members/other stakeholder engagement:** Sixty individuals attended the annual general reviewer training that included members, non-member (archivists, etc.), and LIS program representatives.

**Describe the Most Impactful Unit Activities this Quarter:** Reviewer training and conducting of virtual reviews.

Searchable DB of ALA accredited programs LIS Listing <https://www.ala.org/cfapps/lisdir/listing.cfm>

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

- Spring (April) edition of the semi-annual Office newsletter *Prism*.
- Committee on Accreditation Winter Meeting to close comprehensive reviews conducted in Fall 2021.
- Conducting training to prepare reviewers to lead panels as chairs.

## **PUBLIC LIBRARY ASSOCIATION**

**Division Executive Director:** Mary Davis Fournier, Executive Director

**Budget Amount (Overall Revenue/Expense):** FY 21 Budget: \$771,600 revenue/\$1,244,656 expense; August 21 Q4; 3<sup>rd</sup> Close actuals: \$748,374 revenue/\$796,226 expense

**# Of Staff:** 12

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

PLA determined two goals aligned to the Pivot Strategy and set sub-goals and deliverables as we work towards them during FY21.

Goal 1: Increase PLA Membership by 2%

Goal 2: Increase PLA CE revenue by 2%

- PLA budgeted a 30% loss in membership for FY21 but ended the year 10% ahead of budget, with a loss of only 20%. Likely due to the pandemic as well as the non-conference year membership dip, we did see declines. While a normal non-conference year might yield \$550,000 in PLA member dues, due to the pandemic only \$387,200 was budgeted. With the close of Q4, PLA closes the year with \$519,888 in dues revenue, which is lower than usual but 34% higher than budgeted.
- PLA effectively leveraged the shift to all-virtual CE to meet the needs of its members during the pandemic, ending the year exceeding its 2% CE revenue growth target by 14%. PLA's CE revenue is generated through paid webinars and virtual learning series

- PLA's paid webinars have generated \$71,240 in sales revenue against budgeted revenue of \$52,000.
- Live professional development activities were optimistically budgeted for FY21, and they were not held. These included space planning, Equity Starts with Us, and Project Outcome trainings. Since these events were not held, expenses were minimal, and two virtual programs have helped generate missing revenue for PLA.
  - The new EDISJ Leadership Lab series, offered virtually, generated \$42,765 in revenue, hitting 40% of the \$110,000 yearly revenue target for the live EDISJ trainings. Due to lower expenses, however, the net stands at \$30,219, which exceeds the budgeted net of \$25,672.
  - The Advancing Family Engagement virtual classroom series closed on target for FY21, with \$18,600 in revenue from its second cohort.

**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 how the field is responding to two main trends: Getting back to 100% service levels and recovering as the pandemic situation evolves; and the challenges of a charged political environment.

1. As libraries expand re-opening, grapple with the COVID variants and continue to figure out how to operate going forward, PLA is paying close attention to activity on the ground. Right now, libraries are in various states of openness, with some fully re-opened and others still struggling to return to full service. PLA will continue to listen to the advice of member-leaders as we work to offer the most relevant and timely support. PLA also launched a free webinar series: Public Libraries: Partners in Workforce Development, which showcases the work public libraries are doing to meet the needs of job seekers.
2. PLA is also closely monitoring the impact of COVID on local budgets. Some libraries are seeing cuts, particularly to professional development and travel lines. This impacts member ability to engage with PLA. To continue to meet members where they are, PLA is working to expand online learning opportunities, preparing for the launch of the ALA E-learning Platform, enhancing our virtual conference experience for PLA2022, and preparing for a Covid-safe PLA22 In-person national conference.
3. Challenges to library collections and programs are on the rise in response to unfounded concerns about both "Critical Race Theory" and LGBTQ content. PLA is providing background support to the good work of our colleagues in OIF and PPA in countering these challenges.

**# of Members (for Divisions):** 7,284 (as of August 2021)

**# of Members/non-members/other stakeholders reached during quarter (for all Units):** Over 10,000

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

The PLA22 conference registration opened in early FY22. As of December 13, 2021, there were 1,343 full conference attendees registered and 156 exhibitors. Early bird registration will close in January, and advance registration closes in late February. We have no current membership reports from ALA so we cannot yet have insight into whether/how conference member registration is aligning with membership renewals.

In September, PLA launched the third cohort of the Advancing Family Engagement virtual classroom series, attracting 99 registrants for a gross of \$27,800.

Also in September, PLA released a new book "Strategic Planning for Public Libraries". This instructional publication provides a framework that libraries of all sizes can use as a basis for their strategic planning. The content is supported by

research conducted across more than 200 public library professionals and in-depth interviews with more than 20 library directors and leaders throughout the country and includes downloadable templates and worksheets.

Additional engagements include:

- 2 paid webinars, totaling \$5,800 in revenue
- 7 free webinars, with total registration over 5,300 and total live attendance of 2,500

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

- PLA launched its new **Benchmark: Library Metrics and Trends** tool in October: [librarybenchmark.org](https://librarybenchmark.org). This tool and associated yearly surveys on various issues (i.e., 2020 Technology; 2021 Staffing & Diversity) replace the discontinued PLDS. Benchmark is a joint project between PLA and ACRL to support data-driven planning and advocacy. This platform extends PLA's commitment to make data and visualizations accessible for all libraries, no matter skill or expertise. There are two tiers of access – FREE (allows users to see key charts and library responses to past surveys) and SUBSCRIPTION (users can access Interactive dashboards, reports, and custom peer comparison data, as well as external data, like census, and past PLDS responses). For libraries, subscription is \$400/year. Other discounts and rates available based on structure and incentives for participating in surveys
- **2021 Public Library Staff and Diversity Survey** is open, and the deadline has been extended to **January 14, 2022**. This unique national survey asks the most pressing questions for the profession today: how diverse are our staff, what are libraries doing to recruit and retain diverse staff, what do libraries pay our directors and new librarians, and what staff roles exist in our nation's public libraries? This information is vital for the field, and PLA is working hard to elicit responses widely. PLA will publish a freely available report of national findings in less than a year after data is submitted.
- Oriented new committee, advisory and task force chairs and aligned committees on PLA EDISJ goals.

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

During the next fiscal quarter, PLA will

- Launch PLA22 Virtual Conference promotion and registration for those who will not be able to attend in-person.
- Finalize myriad details and contingencies for the PLA22 national conference in Portland, Ore.
- Offer two additional [paid webinars](#)
- [Launch 12 new or updated digitallearn.org courses in English and Spanish, funded in partnership with AT&T, Inc.](#)
- Fill staff vacancies

#### **PUBLIC POLICY AND ADVOCACY (PPA)**

**Unit Manager:** Kathi Kromer

**Budget Amount (Overall Revenue/Expense):** \$2,734,495

# of Staff: 15

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

☒ Membership

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

The Public Policy and Advocacy office (PPA) continues to contribute to ALA's membership goal. In addition to mobilizing library advocates, PPA has produced and promoted resources that will enable ALA members to access additional funding through the American Rescue Plan Act (ARPA) of 2021, including the \$10 billion [Coronavirus Capital Projects Fund](#).

Also, in alignment with the ALA pivot strategy for increasing meaningful membership engagement opportunities, PPA has created new resources, provided professional development opportunities, and expanded communication with ALA members and divisions to broaden their advocacy skills. ALA members are also increasing their policy and advocacy engagement on social media, particularly related to the Infrastructure Investment and Jobs Act and budget reconciliation bills.

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

Last quarter, PPA [welcomed substantial increases](#) in federal funding for libraries approved by the House Appropriations Committee for Fiscal Year (FY) 2022, which included a \$9 million increase for the IMLS-administered Library Services and Technology Act (LSTA), and a \$3 million increase for the Department of Education-administered Innovative Approaches to Literacy (IAL) program. The Senate draft of the appropriation bills also includes \$3 million for an important Information Literacy Taskforce. As it currently stands, the federal government is operating on a continuing resolution (CR), and is not expected to revisit the FY 2022 appropriations bills before mid-February. This means that funding levels from FY 2021 will continue until Congress can come to an agreement, and these proposed increases to federal library programs will be on hold. Since many libraries rely on the need for constant, robust federal funding, PPA staff are concerned that these proposed increases will be delayed. This also creates a possibility that there will be two separate appropriations bills to track and advocate for at the same time next year, as the President normally releases the budget proposal for the next fiscal year (2023) around mid-February.

PPA staff have been actively involved with our state affiliates in providing support for legislation that expands both libraries' and library users' access to digital content via eBooks, including New York and Maryland. [The Maryland bill](#), which will take effect on January 1, 2022, will be the first law of its kind in the nation, requiring publishers to sell or license to libraries any content available to the public in Maryland. On December 9<sup>th</sup>, 2021, the American Association of Publishers (AAP) filed a lawsuit against the state of Maryland, challenging this upcoming law. PPA staff, along with the Maryland Library Association and ALA's Legal Counsel, Jonathan Band, Esq., are busy at work to ensure that this lawsuit does not further impede on the rights of Marylander's equitable access to information.

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

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

- ALA members and leaders, reached via social media, advocacy alerts and emails
- Support for ALA President Wong's presentations on advocacy for state association conferences: Arkansas, New Mexico, Washington
- Libraries Build Business events, including monthly Instagram Live events by Megan Janicki

- In September, Alan Inouye moderated a session at the [Telecom Policy Research Conference](#)
- In October, Megan Cusick and Alan Inouye cohosted a Chapter Advocacy Exchange, [E-Books for All: from National Advocacy to State Policy](#)
- In October, Alan Inouye hosted a seminar at the Berkley School of Information, [Whiplash: Library & Education Public Policy in the Covid Era](#)
- In October, Megan Cusick presented a session at the AASL Conference, [Sustainable Advocacy: Strengthen Your Impact](#)
- In October, with the Office of Intellectual Freedom, Megan Cusick hosted a Legislative Summit for state representatives addressing the rise of adverse legislation challenging intellectual freedom and privacy in the library
- In November, Kathi Kromer presented on a panel for a COSLA session, 2021 Reflections; Lessons Learned & New Directions
- In November, Megan Cusick, along with Committee on Legislation (COL) Chair Joe Thompson, presented on a Booklist Webinar, [Dream Big: Secure ESSER Funding for Your School Library](#)
- Monthly presentations by Kathi Kromer for [ALA Connect Live](#)
- Scores of posts on PPA (@LibraryPolicy), ALA and ALA division (incl. AASL, ACRL, PLA, UFL, ILL) social media accounts and blogs
- Library advocates (distinct from ALA members) via emails through ALA's advocacy center and multiple daily posts on social media
- Media via press releases and direct outreach resulting in interviews with library trade and other media

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

- Developed and promoted new resources through the ALA website and social media channels to assist ALA chapters and local libraries in accessing funding through the \$10 billion [Coronavirus Capital Projects Fund](#), established as part of [the American Rescue Plan Act](#).
- [Hosted the Connectivity Corner, a series of conversations on Instagram Live with library practitioners and ALA President Patty Wong on libraries, broadband and digital equity. The second conversation in the series took place in November featuring Alma Ramos-McDermott, a certified school librarian at Lake Trafford Elementary in Florida.](#)
- [Published a comprehensive Policy Perspective, Keeping Communities Connected: Library Broadband Services During the COVID-19 Pandemic](#), detailing the critical role that libraries play in bridging the broadband connectivity gap.
- [Created a handy, printable one-pager highlighting the record levels of funding for federal library programs obtained throughout the pandemic. This resource was shared with ALA member leaders, distributed at several events, including the REFORMA 50<sup>th</sup> Anniversary Conference, and is hosted on the ALA website to celebrate these incredible milestones.](#)

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

- **eBook support for states:** PPA will continue to provide policy advice, legal counsel, and communications advocacy assistance as appropriate to chapters working toward state legislation on library access to digital content, such as in Maryland (law takes effect January 1, 2022), New York (legislation passed, awaiting Governor Hochul's signature), Rhode Island (legislation introduced) and Massachusetts (legislation introduced).

- **#FundLibraries FY 2023:** PPA will focus advocacy efforts on appropriations committees to ensure robust funding for IMLS will benefit library services and maintain level funding for the Innovative Approaches to Literacy program. PPA staff will launch its annual #FundLibraries campaign after the President releases his proposed budget for FY 2023, which will include hosting targeted virtual congressional meetings with ALA advocates in March, producing factsheets and resources, and generating action alerts for the annual Dear Appropriator letters in support of increased federal funding for library programs.
- **Digital Equity Act:** The Infrastructure Investment and Jobs Act, signed by President Biden in November, provides \$2.75 billion for the [Digital Equity Act](#) to create new federal investments for digital inclusion projects at the national, state and local levels, and libraries of all types will be eligible. PPA staff are closely monitoring the developments of this program and working to influence its roll out. PPA will also be producing factsheets and resources to assist ALA members in obtaining portions of this funding for their libraries.

## PUBLIC PROGRAMS OFFICE (PPO)

**Revenue Stream Manager:** Melanie Welch

**Budget Amount (Overall Revenue/Expense):** General Fund Admin (\$186,474); Grants: \$1,718,950; Overhead: \$190,807

**# of Staff:** 10 positions; 6 currently staffed, 1 new person starts in January, additional open positions posted or in progress. (8.5 FTEs fully supported by grant projects)

**Revenue Stream or Division:**

☒ Contributed Revenue

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

PPO empowers libraries to create vibrant hubs of learning, conversation, and connection in communities of all types. Our staff works closely with librarians, humanities scholars, artists and documentarians, STEM and financial literacy experts, and others to create nationwide programming opportunities, grants, and traveling exhibitions for libraries.

- **GOAL #1:** Support ALA revenue goals in FY22 by developing new/strengthening existing strategies to monetize PPO's position as ALA's main grantmaking unit
- **GOAL #2:** Increase PPO earned and grant revenue in FY22 by 10%.

PPO is preparing to announce a groundbreaking new grant to support a new grantmaking initiative, Libraries Transforming Communities (LTC): Accessible Small and Rural Communities. This opportunity will enable PPO to advance both Goals #1 and #2.

Up to 600 grants, totaling \$7.5 million, will be awarded to help libraries improve accessibility of their facilities, programming and services. Participating libraries will host community conversations to better serve patrons who are disabled or neurodivergent.

The remaining grant funds will provide significant support and benefits across ALA, such as:

- 10% indirect (\$1 million in contributed revenue) to the ALA General Fund
- PPO staff support (\$553,000)



- A new Accessibility Officer position to be based in ODLOS, plus additional consultant support (\$255,000)
- ALA and division memberships for all grant recipients (\$137,000)
- A new ALA data analytics platform (\$190,000)
- Support for CMO for media consulting and promotion support (\$200,000)
- \$176,000 for ALA staff professional development, including training for all staff on accessibility
- Support for PLA and ACRL's Project Outcome (\$40,000)
- Purchase of 600 print copies of the ALA Editions title "Planning Guide for Serving Patrons with Disabilities" (\$40,000)

A 3.5-year project will begin on January 1, 2022.

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

Staff transitions continue to be the greatest issue facing the Public Programs Office at this time. As described above, we have seen an influx of new grant-funded work recently, in addition to the 12 other grant programs and exhibitions already in progress at libraries throughout the country. This workload has been challenging in recent months, following the departure of three longtime PPO staff members in 2021 (including the retirement of longtime director Deb Robertson), and more recently, the additional departure of a program coordinator to pursue library school. However, we are thrilled to report that HR has approved a PPO staff re-organization plan, and we are in the process of hiring three new grant-funded positions, including a program coordinator who will begin in early January. We look forward to hiring and onboarding those individuals and working with a full team in the coming months.

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

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

As of December 17, PPO is managing 724 library grants nationwide.

PPO's [ProgrammingLibrarian.org](https://programminglibrarian.org) website had 24,404 unique users in September, 28,626 in October, and 25,634 in November. This is roughly on par with previous months.

Membership in the [Programming Librarian Facebook group](https://www.facebook.com/programminglibrarian) has grown to 22,815 members on December 13, up from 20,851 in September. (This is a private group; submit request and answer the brief membership questions to join.)

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

PPO received 373 applications for the [American Rescue Plan: Humanities Grants for Libraries](https://www.americanrescueplan.org/humanities-grants-for-libraries) opportunity, a grantmaking program to deliver relief to libraries recovering from the coronavirus pandemic. With funding from the National Endowment for the Humanities (NEH) through the American Rescue Plan Act of 2021, ALA will distribute 200 grants of \$10,000 each to libraries, with an emphasis on reaching libraries in historically underserved and/or rural communities. Libraries will be selected through a competitive, peer-reviewed process, which is currently underway.

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

- Announce recipients of the American Rescue Plan: Humanities Grants for Libraries (200 libraries)
- Announce recipients for Let's Talk About It: Women's Suffrage (25 libraries)
- Collect applications for the Peggy Barber Tribute Grant and Libraries Transform Communities Engagement Grant

**PUBLISHING & MEDIA (ALA GRAPHICS, ALA EDITIONS/ALA NEAL-SCHUMAN, AMERICAN LIBRARIES, BOOKLIST, DIGITAL REFERENCE-RDA, PRODUCTION SERVICES)**

**Revenue Stream Manager:** Mary Mackay

**Budget Amount: FY22 Revenue:** \$9,343,937/ Overhead: \$2,476,143/ Net \$181,895

**# of Staff:** 47

**Revenue Stream or Division:**

☒ Publishing & Media

**Status Report on Pivot Strategy Aligned Work:**

Effective 9/1/21, the department was renamed ALA Publishing & Media, reflecting general trends and areas of work as well as Pivot Strategy imperatives. The FY22 goals for ALA Publishing & Media that inform the individual units' goals and current activities, as well as the work of the related Cross-Functional Team, include extending markets beyond libraries and beyond the US, and repackaging and repurposing content to reach and serve targeted audiences both within and beyond the library field. Examples of Q1 work in these areas include: the launch of *Booklist Reader*, a patron-facing monthly publication (currently digital-only) that offers selected Booklist content highlighting diverse voices and books; the publication of three one-year reading journals for the general market featuring titles recommended by editors from ALA Editions and *Booklist*, in collaboration with trade publisher Sourcebooks; materials displayed at the Sharjah International Book Fair in November; and ongoing work with international translation partners for RDA: Resource Description and Access. The creation of the Graphics Giftshop at spreadshirt.com allows the general public to discover and purchase our library- and reading-related products more readily.

In keeping with the Pivot Strategy, the ALA Publishing & Media department continues to focus on revenue generation and expense control as its critical drivers, considering how its work supports membership and ALA's mission through what is published, who is creating the content, and audiences reached. Published content and initiatives support the imperative of increasing EDISJ engagement and amplifying "Let Our Legacy Be Justice." Examples include recent publications such as *Library Services and Incarceration: Recognizing Barriers, Strengthening Access*, implementation of the new Academic Insights column in *American Libraries* featuring rotating columnists of color, content selected for the patron-facing *Booklist Reader*, and a new two-page summary with an introduction by ODLOS of EDISJ-related titles in the ALA Editions/ALA Neal-Schuman catalog.

**Describe the major issues, trends, opportunities, or concerns that your unit has or is responding to at the closing of this fiscal quarter Q1 FY22:**

The high number of open jobs has led to a very strong quarter for ALA JobLIST, a joint project between *American Libraries* and ACRL.

The initial success of *Booklist Reader*, launched in September, offers both opportunities and inspiration.

A global shortage of paper pulp is causing major disruption to the publishing industry with delays of up to 12 weeks in getting paper from suppliers; these supply-and-demand disruptions are resulting in longer-than-usual print times, likely to continue affecting all units except RDA in Q2 of FY22. (This impacts magazines, books, and catalogs.)

The cancellation of LibLearnX as an in-person event will save travel and exhibit expenses (around \$25,000) but also affect revenue (impact of up to \$80,000) especially due to the absence of a live store and advertisers not experiencing the imperative that ALA Midwinter magazine issues used to present.

*Booklist* and *American Libraries* are perceived as well positioned to create and deliver informed and useful content for advertisers and sponsors, and their staff are seeking ways to integrate this work or outsource when necessary. We see a continued increase in expectations for original content to be generated on advertisers' and sponsors' behalf as part of the value they require the magazines to deliver.

Licensing continues to offer opportunities for incremental revenue for ALA Graphics and to extend the reach and range of products and product partners, including affiliates.

While fewer people at all levels and stages of their careers in many fields, including ours, are making individual book purchases as primary professional development tools or sources of information, areas of continued success include textbooks, especially those that are considered the gold standard in a particular area and those that address issues more recently introduced to LIS curriculum; books related to RDA or specific training programs; and books that address time-sensitive problems. While high quantity bulk sales of print titles with one bill-to and one ship-to address continue to be fewer than before, several smaller, virtual professional development gatherings needing drop ship services took place in Q1 (15-20 units per event). We expect this trend to continue with more organizations being able to host professional development workshops and events again.

Integration with the Chicago Distribution Center has been moving forward with many solutions now in place. All remaining stock was received at CDC in late September/early October. The move resulted in lower product sales (books, posters, bookmarks) sales for longer than anticipated in FY21 Q4 and FY22 Q1, but we saw increases in orders and units sold as Q1 progressed. Amazon integration issues related to mapping accounts and metadata is not a problem unique to ALA—we learned from CDC that Amazon recently let go their entire team that works on accounts like ours due to performance problems. The team continues to work with IT on the shopping cart integration as a high priority in Q2.

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

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

*The magazines 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 % of transactions with member discounts. A high percentage of our sales do not have linked member information because they go through distributors (Amazon, Baker & Taylor, EBSCO, etc.) that use proprietary ordering systems and don't share customer data. Some orders are placed by accounting/ administrative departments of institutions that may be ordering for members but don't use member numbers to apply for discounts.*

#### **Booklist Q1**

- 8,564 print subscribers (+743 from Q4)
- 67 institutional digital subscriptions (+6 from Q4)
- 302,792 Booklist newsletter subscriptions combined (-70K from Q4 due to consolidation of newsletters) (top newsletter list 96K)
- 6,141 active profiles, Booklist Online (+1,189 from Q4) (Addition of "Activate Profile Button" and Booklist Reader driving activations on BOL)

- 43,400 Twitter followers (+400 from Q4)
- 16,385 Facebook page follows; 14,833 Facebook page likes
- YouTube channel subscribers 414
- 538 LinkedIn followers (+90 from Q4)
- Q1 Podcasts: 2,930 listens for 5 podcasts
- Q1 webinars: 25,752 registrants for 23 webinars

#### American Libraries and AL Direct Q1

46,210 recipients AL print (Sept/Oct and Nov/Dec) (-612 from Q4)

31,298 average recipients weekly AL Direct (-431 from Q4)

10,432 podcast listens (FY22 cumulative = 10,432)

97,586 Twitter followers (+1,234 from Q4); 17,574 Facebook page followers (+70 from Q4)

#### Digital Reference/RDA Q1

2,492 Toolkit subscribers (+ 24 from Q4 – FY21)

9,879 users (- 58 from Q4 – FY21)

25,767 newsletter recipients (+6,737 from Q4 – FY21)

1,498 RDA-L email subscribers (+20 from Q4 – FY21)

1,398 subscribers to RDA Toolkit YouTube Channel (+94 from Q4 – FY21)

#### ALA Graphics Q1

1,901 orders (+692 from Q4), 8,907 products purchased (+3,026 from Q4), no printed catalogs scheduled Q1.

#### ALA Editions/ALA Neal Schuman Q1 FY22

2,553 orders (+1,193 from Q4); 9,580 net units purchased (+3,248 from Q4)

19,402 academic catalogs mailed

3,834 textbook catalogs mailed

#### ALA Store Q1 FY22

- 171,468 sessions (previously called "visits") +14,817 from Q4
  - Note: Unique sessions stats not available in Google Analytics
- 377,776 unique pageviews (+2,433 from Q4)
- Users typically spend about 2 minutes per visit to the store (about the same as Q4)
- 41.2% of users find the store via organic search; 35.4% of users find the store via direct link; 19.7% of users find the store via referrals from other sites (60% from ala.org); 2.9% of users find the store via social media

#### **Describe the Most Impactful Unit Activities this Quarter, Q1 FY22:**

##### Booklist Q1:

- Production, editorial, and marketing launched *Booklist's* new monthly patron-facing product, *Booklist Reader* in September. Currently, *Booklist Reader* is a digital only, monthly publication that offers selected content from *Booklist* with a focus on diverse voices and publications.
- Through Q1 advertising sales is above budget; however, December ad sales were low, and January is tracking low, partly because LibLearnX is a virtual rather than in-person meeting.

- *Booklist* subscriptions saw a substantial increase in Q1. This is partly attributed to the added value with the addition of *Booklist Reader* and partly to the pandemic easing.
- *Booklist* webinars, which had the best year ever in FY21, are off to a strong start in FY22.
- Sarah Hashimoto is *Booklist*'s new Advisory Board Chair. Terry Hong, who agreed to serve as Chair for one year, has closed out her term.

#### ALA Editions/ALA Neal-Schuman Q1:

- Published a total of 13 book projects. The cumulative total of books planned for FY22 is 50. The FY21 total was 36 ALA titles and 12-14 Facet titles.
- The ALA Editions/Neal-Schuman participation in the AASL conference store in Salt Lake City included several successful author talks and net book sales close to \$15k. This revenue will book in early Q2.
- An agreement was signed for a Japanese translation of the 10th edition of the *Intellectual Freedom Manual* and the Portuguese translation of *Metaliteracy* was published in October.
- Ebooks and related metadata have been successfully uploaded to the Gale Cengage platform and we should begin to see incremental sales and exposure in Q2.
- After a Q4 slowdown during the warehouse transition, normal marketing efforts resumed with three targeted catalogs (including textbook/course materials and academic titles) arriving in mailboxes for the start of FY22 Q1. A two-page spread spotlighting a wide selection of essential resources for libraries to further the core values of equity, diversity, inclusion, literacy, and outreach launched in the Fall/Winter 2022 Catalog.
- Copies of several ALA Editions/Neal-Schuman titles were displayed at the Sharjah International Book Fair in November.

#### American Libraries Q1:

- Classified ad revenue for JobLIST, a partnership with ACRL, will be a Q1 record (nearly \$112K/unit) for the JobLIST era, topping Q1 FY18. Of a total of 183 months of JobLIST, September was the 4th best month ever, October was the 6th, and November the 13th.
- Published a [special report](#) for the 20<sup>th</sup> anniversary of 9/11 in the Sept/Oct issue.
- Helped promote the hiring of ACRL's new director, [Jay Malone](#), and ALA Continuing Education's new director, [Dan Freeman](#), by posting 11 Questions interviews with each.

#### Digital Reference/RDA Q1:

- Subscriptions ran slightly ahead of budget all quarter, a promising sign that new marketing outreaches, messaging, and tactics have laid good groundwork for growth.
- Work toward the migration of RDA websites to new servers continued and is expected to be completed in Q2.
- A detailed examination of RDA and RDA Fund accounting practices was initiated and will continue into Q2 in hopes of identifying a more accurate and efficient process for revenue collection and tracking.

#### ALA Graphics Q1:

- ALA Graphics added AASL as a new partner in the Graphics Gift Shop (virtual shop) debuting 5 AASL designs on 18 products. A total of 12 new designs on 52 products launched.
- ALA Graphics and ALA Editions/Neal-Schuman ran a successful AASL National Conference Store generating \$29,000 in revenue for ALA and AASL.
- Licensed Baby Yoda READ<sup>®</sup> library card art to 28 libraries including 100,000 cards to King County Library System.

#### **Select Future Activities and Events Through End of Next Fiscal Quarter, Q2 FY22:**

In concert with cross-functional team activities, we continue to consider specific KPIs that reflect the Pivot Strategy priorities. These will be our focus as we finalize FY22 individual and unit goals.

Books published in Q2 will cover a wide range of topics including race in storytimes, instruction coordinator fundamentals, communities of practice in the academic library, and metaliteracy. In collaboration with Core Publishing, *Zines in Libraries* and *Managing Grey Literature* will be released. The third edition of bestseller *Metadata* will publish in Q2. The previous edition was named a 2017 CHOICE Outstanding Academic Title. In collaboration with Sourcebooks, 3 one-year reading journals featuring titles recommended by editors from the association and *Booklist* are now available to the public and will be featuring in a Sourcebooks launch webinar in January with two prominent authors.

Ongoing promotion for *Booklist's* new digital-only patron-facing product, *Booklist Reader*, will encourage use and help boost subscriptions while also expanding reach to the public in all communities. A print version will be mailed with the February/March issue of *Public Libraries* before the PLA Conference.

In Q2 and Q3, Digital Reference will develop new orientation events to promote the post-3R RDA Toolkit, including free monthly webinars and collaborations with the CE unit on revenue-generating ecourses. Work continues on translations underway and investigation of further possibilities.

In Q2, Graphics will mail a new winter catalog featuring the art of diverse, award-winning illustrators and launching the new products for 2022 National Library Week. Graphics has licensed the vintage Fabio READ poster to Out of Print which is expected to launch on t-shirts in mid-February.

The Publishing & Media cross-functional team's work and outcomes in FY22 are a focus for several staff in the department.

## REFERENCE AND USER SERVICES ASSOCIATION (RUSA)

**Division Executive Director:** Bill Ladewski

**Budget Amount (Overall Revenue/Expense):** Revenue \$314,250 / Expense \$308,475

**# of Staff:** 2.3 (two staff members divide time between RUSA, YALSA and ODLOS)

### 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 August, RUSA had 2,574 members. This represented a slight increase from the 2,548 membership total reported in July. In August RUSA also recorded an increase in membership in all but one of its Sections. A RUSA [membership and retention task force](#) is currently investigated the motivations and reasoning behind members joining or not joining RUSA. Strategies for member growth will be implemented through the findings of the task force.

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

RUSA plans to introduce its CE focused RUSA essentials bundle. With the recent launch of the new Learning Management System (LMS), promotion of the essentials bundle will likely begin second quarter. Through November, RUSA's completed CE programs have consisted of 5 e-courses and 5 webinars, with total combined attendance of 304 participants. Planning for RUSA's first ever Virtual Forum continues to move forward. Dates have been selected for the two-day Virtual Forum, March 8 & 10. A draft agenda has been created and a final agenda will be finished soon. Promotion should begin in early January. If the Virtual Forum program proves successful, we hope this will bring in additional revenue to our CE revenue line helping us achieve 2% growth in FY22 or higher.

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

- Developing new revenue streams for FY22: It will be necessary for RUSA to develop new revenue streams in FY22 and beyond to secure long term fiscal stability. The RUSA Budget & Finance committee, working with the RUSA Executive Director, are looking at potential new sources of revenue through efforts around development and leveraging out new Virtual Forum to make it appealing to potential sponsors. The Virtual Forum also has the potential to bring in new RUSA members through strategic program pricing. If successful we hope this can be a program that can grow in size and influence and be repeated on an annual or bi-annual basis.
- RUSA staffing: RUSA had a staff member leave for another opportunity in October, reducing our staffing level from 2.8 to 2.3 FTE's. The staff member who left led our efforts in marketing communications and website support. The remaining RUSA staff will be absorbing that workload for the time being. We hope to not see a noticeable drop-in service and support in these areas, however the individual who left possessed a level of professional expertise that the remaining staff cannot match. As the year progresses, we will weigh whether we have been able to capably support these areas, and if RUSA's financial position will allow for filling this staff role at some point.
- RUSQ Journal: RUSA's quarterly journal *RUSQ* has not published in over a year and a half. This lack of keeping to a publishing schedule for the journal was not anticipated or planned but were brought on by unexpected circumstances related to volunteer capacity. A former *RUSQ* Editor has recently stepped in to work through the backlog of submissions for the journal to produce a 'catch-up' issue. That issue is now due to publish by the end of this year. Going forward, RUSA's Publications Task Force will continue to evaluate the journal to determine whether RUSA may be able to continue to publish it in the future.

**# of Members:** 2,574 as of August 2021

**# of Members/non-members/other stakeholders reached during quarter:** Approximately 40,000 through association wide promotion of the opening for submissions of our 2022 RUSA Achievement Awards.

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

RUSA has continued to maintain a full [CE calendar](#). With the recent launch of the new ALA Learning Management System (LMS) we are excited with how this platform will help support and expand RUSA's programming reach going forward. RUSA's membership, with August reporting numbers, has shown a recent month over month growth in membership.

- Through the 1Q of FY22, RUSA CE has presented 5 e-courses and 5 webinars totaling 304 participants. Additional confirmed upcoming CE programming consist of 2 e-courses and 2 webinars. Although FY22 1Q financial figures are not yet available, RUSA CE appears to be tracking to its budget expectations.
- FY22 has started with the establishment of two important task forces for RUSA, the RUSA Membership and Retention Task Force and the RUSA Publications Task Force. Each of these task forces will be developing needed strategies for major RUSA areas with budget implications, membership, and publications. The progress of these groups will be shared throughout the year.
- Definition of Reference update: The work of updating the [Definition of Reference](#) just concluded. The RUSA Professional Resources Committee led the yearlong effort to create this update which was just recently approved by the RUSA Board.

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

- RUSA Section BRASS fall program: The first ever [BRASS Fall Thing](#), a new virtual event open to all was held October 19 - 21. The event hosted 99 attendees and generated over \$11,000 in revenue for RUSA. The theme was business information literacy and included a combination of live programming and access to vaulted programming. The 7 hours of live programming included workshops and lightning talks focused on business information literacy, the Framework, and teaching students how to find, use, and evaluate business resources and information.
- RUSA 2022 Achievement Awards. In October RUSA officially opened it's 2022 [Achievement Awards](#) season and is currently taking award submissions. RUSA will be accepting award submissions through early February. RUSA currently offers a total of 25 Achievement Awards. Winners will be announced in April.
- Submission of balanced FY22 Budget. In September RUSA submitted a balanced budget for FY22. The FY22 budget marks progress for RUSA in its continuing efforts to pivot to a financially sustainable Division. This is the first balanced (non-deficit) budget that RUSA has submitted in what appears to be at least 10 years. The balanced budget for FY22 has provided RUSA membership optimism that its efforts to stabilize its finances have achieved some success.

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

RUSA Book and Media Awards: The annual [RUSA Book & Media Awards](#) will be held during LibLearnX on Sunday, January 23<sup>rd</sup> at 4:30 p.m. CT. RUSA is home to many book and media awards and Best of Lists for adults. Now in the national spotlight with other prestigious literary awards, the Andrew Carnegie Medals for Excellence in Fiction and Nonfiction are announced at the RUSA's Book and Media Awards ceremony. The year's best in fiction, nonfiction, poetry, audiobook narration, reference materials and more, are hand-picked by selection committees that work closely with adult readers. Their efforts narrow down hundreds of finalists to curate the highly regarded "Best of" lists used by librarians, publishers, and booksellers nationwide.

- 2022 Election – Candidate Town Hall: RUSA is planning to hold a Town Hall program in February to provide the candidates on the 2022 election ballot an opportunity to address RUSA membership and take questions. This is the first time in recent memory that RUSA has hosted a program like this, which is being developed by the RUSA Nominating Committee. RUSA is honored to be able to present a full slate of candidates for the 2022 election who will lead RUSA into the future.



## UNITED FOR LIBRARIES

**Revenue Stream/Division Manager:** Beth Nawalinski

**Budget Amount (Overall Revenue/Expense):** FY22: \$383,100/\$374,432

**# of Staff:** 2.8

**Revenue Stream or Division:**

☒ United for Libraries

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

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

Delineation completed in FY21. Reconfiguring "group members" continues with a projected timeline of implementation for the start of FY23 on 9/1/22. Communications and marketing plan will be completed in quarter three to implement in quarter four for the implementation of the reconfiguration on 9/1/22.

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

Completed in fourth quarter of FY21.

Goal 3: Increase registration and revenue for United for Libraries training/eLearning.

In the first quarter, Alaska confirmed one year access for Short Takes for Trustees to begin 1/1/22, and Florida confirmed one year all access training contract to begin May 2022. Contract discussion in underway with AR, OK, and WI. Transition to ALA's new eLearning site continues with NH, OR, and VA launched in the new system in the first quarter. Work continues in quarter two as we move all remaining state partners from Teachable to the new eLearning site.

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

Material, Resource, & Program Challenges – Boards of Trustees around the country are facing increasing challenges to library materials, resources, and programs. Additionally, board dynamics have been influenced and disrupted by the appointment of Trustees with personal views and agendas in direct opposition to library values. We are seeing an increased need for board training and support in several areas:

- Roles & Responsibilities of Trustees
- Understanding of Governing vs. Advisory Boards
- Conflict of Interest and Ethics Policies/Statements
- Regular Policy Review/Update
- Effective Board Meetings
- Board/Director Relationship

United for Libraries in the first quarter of FY21 responded in these areas:

- United for Libraries Executive Director was interviewed for a November 1 American Libraries article ([A Conflict of Values](#)).
- **Library Boards, Intellectual Freedom, and Challenges**, December's Learning Live scheduled for December 14, 2020. Learning Live is open to all United for Libraries personal and group members, including Statewide Group Members for live participation and ongoing on-demand access to the recording. Statewide All Access training partner states receive free live participation and on-demand access to the recording for 30 days.
- Two United for Libraries staff members and two board members are serving on ALA's Rapid Response Team.
- The United for Libraries Member Resources Task Force began its work to review and evaluate all current member resources (tip sheets, toolkits, publications, webinars, etc.) and to make recommendations for each resource to keep, update, or replace. The task force is prioritizing materials related to these issues being faced by boards.
- United for Libraries' president Charity Tyler created an Intellectual Freedom task force led by Skip Dye and Kathleen McEvoy to:
  - Organize broad-reaching online educational programs (webinars, brief videos, etc.) to support and educate library Trustees and those working with them in the fight against censorship and the right to read.
  - Generate additional educational materials on this topic for United for Libraries channels (for example, blog posts, tip sheets, FAQs, social media posts, etc.).
  - Organize United for Libraries President's Program at the 2022 ALA Annual Conference focused on intellectual freedom and Trustees (determine speakers/moderator, topics to be covered, related resources, etc.).

**# of Members:** 1150 (personal/org members); 2986 (group) = 4,136

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

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

Learning Live continues to be an incentive for membership renewal, retention, and growth. Each registration is verified for current membership before being approved. This process will be less staff intensive with the launch of the new eLearning platform.

The move from Sympa listservs to ALA Connect resulted in a significant drop in member engagement/discussions. Members only resources are currently being moved from the ALA website to ALA Connect, which we anticipate will increase logins to ALA Connect and therefore engagement in the discussion communities.

United for Libraries was the first division/unit with [free on-demand webinars](#) on the ALA eLearning site with ten (10) on-demand webinars available for free registration several weeks ahead of the official site launch. Plans are underway to follow-up with individuals registering for those free sessions to promote membership.

Staff is currently working on moving all statewide access from Teachable to the new eLearning site with a focus on increasing registration, participation, and completion of training. The single platform will expose Trustees, Friends, and Foundations to free and paid training opportunities offered by other units/divisions and will expose non-United members to the free and paid training opportunities offered by United for Libraries. Updated promotional materials clearly delineate the difference between statewide training and membership and highlight the value proposition of membership in addition to the training/resource access that individuals and libraries receive through their state library's partnership/purchase with United for Libraries.

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

- [National Friends of Libraries Week](#) hosted October 17-23, 2021
- United for Libraries Learning Live (monthly members only webinars):
  - September 14, 2021, 2:00 pm ET: Celebrating National Friends of Libraries Week
  - October 12, 2021, 2:00 pm ET: Making the Ask for End-of-Year Giving
  - November 9, 2021, 2:00 pm ET: Virtual Fundraisers
- 10 free on-demand webinars launched on eLearning site.
- NH, OR, and VA statewide access launched on eLearning site with two live welcome/training webinars hosted for each state.
- Executive Director Beth Nawalinski presented to State Library development staff about statewide training opportunities and the new eLearning site.
- United for Libraries Intellectual Freedom Task Force created to address issues being faced by members.
- United for Libraries Members Resources Task Force began work on reviewing all member resources.
- United for Libraries Awards Committee revamped awards; restructuring approved by the board.
- Initiated shift of blog and e-newsletter work to ALA Production Services in preparation of departure of United for Libraries staff member Trish McFadden.
- Launched new orientation process for United for Libraries board members.
- Streamlined Literary Landmarks program including submissions, approvals, plaque ordering, and wrap-up to reduce staff/member time.

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

- United for Libraries Learning Live (monthly members only webinars):
  - January 11, 2022, 2:00 pm ET: Friends and Foundations Working Effectively with the Library
  - February 8, 2022, 2:00 pm ET: Topic TBD
  - March 8, 2022, 2:00 pm ET: Topic TBD
- Free webinar on board meeting effectiveness to share best practices and guidance for boards facing difficulties arising from the increase in material, resource, and program challenges.
  - Tentative Title: Keeping Governance on Track
  - Date: TBD
- Free town hall for Trustees on the increase in material, resource, and program challenges
  - Date: TBD
- eLearning Site Launch for AK, MA, MD, MI, MT, NE, NJ, SC, SD, TX
- Executive Director Beth Nawalinski to speak at the Alaska Library Association conference (virtual, February 2022)
- Executive Director Beth Nawalinski to co-present a pre-conference with Peter Pearson at the Florida Library Association Conference (in person, May 2022)
- United for Libraries Program Coordinator Trish McFadden (0.8 FTE) is leaving ALA as of January 3, 2022.

**YALSA**

**Division Executive Director:** Tammy Dillard-Steels

**Budget Amount:** \$565,595

# of Staff: 4.5

**Status Report on Pivot Strategy Aligned Unit Goals, attached for Reference:**

YALSA held its 2021 Young Adult Services Hybrid Symposium on November 5-7, 2021, in Reno, NV, and Virtually. The Symposium's theme was "Biggest Little Safe Spaces: Serving Teens During Times of Adversity." **Two hundred and thirteen attendees** registered for the in-person Symposium session. One hundred sixty-three individuals registered for the Virtual Symposium and 10 group registrations for the Virtual Symposium, which yielded 70 additional attendees; overall, YALSA had **233 attendees** for the virtual Symposium. The group pricing was a new initiative created to allow more staff at a library to participate at a discounted rate.

Prior to the Symposium, YALSA held the final IMLS grant Train the Trainer meeting. The meeting allowed all cohorts to participate both in-person and virtual through live streaming of the training.

**# of Members:** YALSA Membership 3,239, an 8.68% decrease from 2020.

**# of Members/non-members/other stakeholders reached during the quarter:** *Weekly, over 3,000 members, receives YALSA's E-News with an average open rate of 37%.*

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

*As of December 17, 2021, YALSA's monthly webinars garnered over 200 registrations in FY'22.*

**September 2021:** [Top Strategies for Marketing Your Library](#)

**September 2021 - Snack & Chat:** YALSA New Strategic Plan and Mission Discussion

**October 2021:** [Connecting Teens with Technology at the Library](#)

**November 2021:** [A Sleuth at Work: Seeking answers and unearthing details of an old family story](#)

**December 2021:** Modern Arab Literature and The Western Audience

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

*Upcoming Meetings Webinars and Celebrations:*

**January 2022**

**Thursday, January 13 at 2 PM Eastern**

**Webinar: Planning an Engaging and Impactful Earth Day Program**

*The presenters will show how you can energize teens to celebrate Earth Day and help make a difference in the community using the inspirational book *Girls Who Green the World: Thirty-Four Rebel Women Out to Save the Planet*. A free Toolkit filled with event ideas and resources will enable you to create a robust and meaningful environmental-based event easily.*

**YALSA's Board Meeting:**

*o Board I Saturday, January 15, 2021, 1:30p-3:30p CST, Virtual*

*o Board II Saturday, January 15, 2021, 4-5:30p CST, Virtual*

**Monday, January 24 at 8 Central Standard Time**

**YMA 2022 Announcements**

YALSA announces the winners of the Alex, Edwards, Odyssey, Morris, Excellence in Nonfiction and Printz Awards.

Name of Unit or Division & Contact person	Name of EDISJ Initiative, Program, Activity, Service or Tool	Brief Description/Summary of EDISJ Initiative, Program, Activity, Service or Tool . Please limit to no more than three sentences.	Dates (approx. start and projected end, if relevant)	Who benefits? (e.g., BIPOC US students; Library staff serving incarcerated or detained individuals)	How do they benefit? (e.g., scholarships or grants of \$X amount; Mentorship for X period; grant... free division membership or conference registration equal to \$X amount (etc.) Please name concrete benefits in terms of funds, time, access to specific offerings, etc.	How many will benefit this year (FY22)?	How many beneficiaries since the program began?	URL where further information can be found
ASSOCIATION FOR SCHOOL LIBRARIES								
AASL	AASL National Conference	Stated AASL core values for EDI. Program submitters were asked to provide in an optional section any personal information or other information related to the school communities, learners, or parents/caregivers/guardians they served for AASL to consider during the review process when looking to meet these core values.	May 2020 to Feb 2020	School librarians				
AASL	Travel Grants to National Conference	Stated AASL commitment to EDI and in optional section asked applicants to provide information. These areas may include, but are not limited to, ethnicity, gender or sexual identities and expressions, religion, disability status, nationality, immigrant/refugee/new American, etc.			Out of 152 applications 58 (38%) choose to not self-identify, 11% identified as BIPOC with 5% specifically identifying as African American/Black, and 2% identified a disability. Comparatively to grant recipients, out of 30 grantees 8 (27%) choose to not self-identify, 37% identified as BIPOC with 10% specifically identifying as African American/Black, and 3% identified a disability.			
AASL	Knowledge Quest , the AASL association journal	In the Mar/Apr 2021 issue five Black school librarians shared their experiences leading in their various school libraries and bringing to bear who they are as Black women educators. Maegen Rose, Adrienne Almeida, K.C. Boyd, Jean Darnell, and Erika Long reflected conversations about equity, diversity, and identity to focus on schools and school librarianship.  The Mar/Apr 2022 issue will explore how school librarians are dealing with Critical Race Theory challenges and how they determine whose voices are included in their collections, including diversity audits and weeding decisions.			Erika Long shared a video via Instagram, relating how important it was to have an issue of KQ feature Black school librarians. <a href="https://www.instagram.com/vlc/medias/?igshid=47uym_mediamshare_sheet">https://www.instagram.com/vlc/medias/?igshid=47uym_mediamshare_sheet</a>			<a href="https://knowledgequest.aasl.org/explore-the-experiences-of-black-school-librarians-in-the-mar-apr-2021/">https://knowledgequest.aasl.org/explore-the-experiences-of-black-school-librarians-in-the-mar-apr-2021/</a>
AASL	Developing Inclusive Learners and Citizens	To aid school librarians in nurturing inclusive learning communities, AASL tasked a 2019 ALA Emerging Leaders team with developing a guide of reflection activities and resources based on the Include Shared Foundation in the National School Library Standards.						<a href="https://standards.aasl.org/project/include/">https://standards.aasl.org/project/include/</a>
ASSOCIATION FOR COLLEGE AND RESEARCH LIBRARIES								
ACRL (Allison Payne), along with ALA's Office for Diversity, Literacy and Outreach Services (Kristin Lahard); the Public Library Association (Scott Allen); and the Association of Research Libraries (Debi Dow)	Building Cultural Proficiencies for Racial Equity framework	Creating a Cultural Proficiencies Framework to help public and academic libraries build inclusive cultures, within libraries and their broader communities, through guidelines on the development and implementation of organizational policies and professional practices that support diverse libraries with a diverse workforce.	September 2019 through December 2021	Public and academic librarians and library workers, and the communities they serve.	Libraries and those who work in libraries recognize that while acceptance is unacceptable and foster an anti-racist vision for the profession	Unable to quantify, but once the FW is finalized and approved, there may be data on downloads and implementation.	N/A, framework is still being drafted.	<a href="https://www.libraryjournal.com/7detailStory=library-associations-announce-joint-cultural-competencies-task-force">https://www.libraryjournal.com/7detailStory=library-associations-announce-joint-cultural-competencies-task-force</a>
Allison Payne, ACRL Program Manager for Strategic Initiatives	ACRL Membership Funding for 50 BIPOC Library Workers	The ACRL Board of Directors approved funds to support up to 50 one-year memberships for ALA and ACRL (a value of over \$200 per membership) for Black, Indigenous, and People of Color (BIPOC) library workers, especially those who serve underrepresented populations.	April 2021 to March 2022	BIPOC library workers	Free ALA and ACRL membership (up to \$200 value/person), member engagement and orientation to ACRL/ALA	48 (50 awarded, but still waiting to hear back from two recipients)	48	<a href="https://acrl.ala.org/acrlinsider/acrl-membership-funding-for-bipoc-library-workers/">https://acrl.ala.org/acrlinsider/acrl-membership-funding-for-bipoc-library-workers/</a>
Allison Payne, ACRL Program Manager for Strategic Initiatives	ACRL Diversity Alliance	The ACRL Diversity Alliance program unites academic libraries committed to increasing the hiring pipeline of qualified and talented individuals from underrepresented racial and ethnic groups. Member institutions can join the alliance by establishing a residency program for at least one individual that lasts a minimum of two years (three years preferred).	2017 to present	Residents from underrepresented racial and ethnic groups, academic libraries	By working together and thinking more broadly, ACRL Diversity Alliance institutions will help diversity and thereby enrich the profession.	58 member institutions.	77 unique institutions	<a href="https://www.ala.org/acrl/issues/diversityalliance">https://www.ala.org/acrl/issues/diversityalliance</a>
Allison Payne, ACRL Program Manager for Strategic Initiatives	Joint ACRL Board of Directors/Budget & Finance Committee EDI Working Group	Charge: Further explore and study existing equity, diversity and inclusion (EDI) work across ACRL through a financial lens and consider how to prioritize and fund social justice or antiracist work that will be beneficial to workforce development, training and professional development.	Fall 2020 to Fall 2021	ACRL members and library workers	The findings from the group will increase ACRL's awareness of gaps in funding for EDI activities. The group's recommendations will include concrete ideas for improvement.	Will need to wait for report and recommendations to see if this can be quantified.	n/a	n/a, report will be posted publicly in fall 2021.
Robert (Jay) Malone, ACRL Executive Director; Kara Malenfant, ACRL Senior Strategist for Special Initiatives	Short-term Priority Setting	The ACRL Board of Directors met in June 2021 to identify short-term priorities for ACRL for the next one to two years. The need for priority setting was brought about by significant changes in higher education, academic libraries, and ALA that necessitated identifying and drafting short-term priorities. In July 2021, a Board Working Group took the outcomes from the priority setting discussions, and updated the annual report/work plan template, which now includes a section on short-term priorities (i.e., Equity, Diversity and Inclusion, Communication and engagement, and Membership). Committee leaders were asked to include their short-term goals as part of their 2021-2022 work plans.	2021-2024	ACRL committee members and academic library workers	Plans have not been implemented for 2021-2022, but could activities could include increase diversity on committees and increase in diverse committee offerings.	unknown at this time	unknown at this time	<a href="https://connect.ala.org/acrl/communities/community-home/digestviewer/viewthread?MessageKey=6cb453aa-0699-43db-b046-98b3e419a5&amp;CommunityKey=00779a0-73bb-40a4-ae7-7d5d9f57111&amp;tab=digestviewer&amp;tab=6cb453aa-0699-43db-b046-98b3e419a5">https://connect.ala.org/acrl/communities/community-home/digestviewer/viewthread?MessageKey=6cb453aa-0699-43db-b046-98b3e419a5&amp;CommunityKey=00779a0-73bb-40a4-ae7-7d5d9f57111&amp;tab=digestviewer&amp;tab=6cb453aa-0699-43db-b046-98b3e419a5</a>
Mary Jane Petrowski, ACRL Associate Director	ACRL Value of Academic Libraries Committee Spotlight Series: Practices of Equity and Social Justice	Through this spotlight series on practices of equity and social justice, the committee is asking librarians from various corners of librarianship to discuss what it means to integrate equity and social justice into our practice and assessment, as well as how they are working toward that goal.	February 17, 2021 to present	Academic and research librarians and library workers	Designed to help academic librarians participate in work that is aligned with the mission, vision, and values of their institutions, as well as providing evidence of the value they provide to these institutions.	There are Google Analytics available for each post. There are also around 1,000 people who subscribe to the RSS feed for the site, mostly via email, who would perhaps have seen it in daily digest form (these aren't included in the GA stats).	At least 1,000	<ul style="list-style-type: none"> <li>•<a href="https://acrl.ala.org/acrlinsider/vai-spotlight-series-practices-of-equity-social-justice-ftthburg-state-university/library/">https://acrl.ala.org/acrlinsider/vai-spotlight-series-practices-of-equity-social-justice-ftthburg-state-university/library/</a></li> <li>•<a href="https://acrl.ala.org/acrlinsider/vai-spotlight-series-practices-of-equity-social-justice-dr-romelia-salinas/">https://acrl.ala.org/acrlinsider/vai-spotlight-series-practices-of-equity-social-justice-dr-romelia-salinas/</a></li> <li>•<a href="https://acrl.ala.org/acrlinsider/vai-spotlight-series-practices-of-equity-social-justice-dr-kawanna-bright-and-dr-monica-colon-aguirre/">https://acrl.ala.org/acrlinsider/vai-spotlight-series-practices-of-equity-social-justice-dr-kawanna-bright-and-dr-monica-colon-aguirre/</a></li> <li>•<a href="https://acrl.ala.org/acrlinsider/vai-spotlight-series-practices-of-equity-social-justice-ione-damasco/">https://acrl.ala.org/acrlinsider/vai-spotlight-series-practices-of-equity-social-justice-ione-damasco/</a></li> <li>•<a href="https://acrl.ala.org/acrlinsider/vai-spotlight-series-practices-of-equity-social-justice-maha-kumarao/">https://acrl.ala.org/acrlinsider/vai-spotlight-series-practices-of-equity-social-justice-maha-kumarao/</a></li> <li>•<a href="https://acrl.ala.org/acrlinsider/vai-spotlight-series-practices-of-equity-social-justice-christina-kuller-gregory/">https://acrl.ala.org/acrlinsider/vai-spotlight-series-practices-of-equity-social-justice-christina-kuller-gregory/</a></li> <li>•<a href="https://acrl.ala.org/acrlinsider/vai-spotlight-series-practices-of-equity-social-justice-mantia-rox/">https://acrl.ala.org/acrlinsider/vai-spotlight-series-practices-of-equity-social-justice-mantia-rox/</a></li> <li>•<a href="https://acrl.ala.org/acrlinsider/vai-spotlight-series-practices-of-equity-social-justice-gemnicka-piper/">https://acrl.ala.org/acrlinsider/vai-spotlight-series-practices-of-equity-social-justice-gemnicka-piper/</a></li> </ul>
ASSOCIATION FOR LIBRARY SERVICE TO CHILDREN								
ALSC – Alena Rivers	ALSC Equity Fellowship	<a href="#">Through the ALSC Equity Fellowship program, ALSC affirms its commitment to equity, diversity, and inclusion by engaging new generations of racially and ethnically diverse library professionals.</a>	Fall 2019 – Summer 2022. May be ongoing if pilot project is evaluated and approved as a long-term fellowship opportunity.	American Indian/Alaska Native/First Nations, Asian, Black/African American, Hispanic/Latinx, Middle Eastern, and/or Native Hawaiian/Other Pacific Islander individuals who commit to service within ALSC	Fellowship recipients will receive funding for two-year ALSC and ALA memberships and one year of conference registrations and travel stipends, if applicable, for ALA or ALSC conferences (approx. \$12,000 for five participants). Fellowship recipients also receive mentorship from members of the Equity, Diversity, and Inclusion within the ALSC task force.		5	<a href="https://www.ala.org/alsc/awardsgrants/scholarships/equity-fellowship">https://www.ala.org/alsc/awardsgrants/scholarships/equity-fellowship</a>
ALSC – Sarah Polen	Continuing Education	ALSC CE has integrated EDI questions into continuing education submissions, to ensure all CE offerings (and their instructors) are engaging with EDI concerns as they present their works and its impact on our members. The Education Committee is also consciously looking at and recruiting CE opportunities that engage with issues of EDI for our members. Further, our Program Coordinating committee, which select conference presentations, is intent on carving out specific EDI-centric programs at all ALSC conferences.	N/A	Anyone viewing/engaging with ALSC CE	By making our CE offerings intentionally conscious of EDI concerns, and requiring presenters and instructors to explicitly show how their work/presentations engage with issues of EDI, those CE experience become more meaningful for members.	1,000+ (anyone who takes an ALSC CE course/webinar or attends conference programming)	N/A	<a href="#">EDI question(s) on CE Presentation Proposal</a> <a href="https://www.ala.org/alsc/learning/online-education-proposal">https://www.ala.org/alsc/learning/online-education-proposal</a>
ALSC – Elizabeth Serrano	ALSC BIPOC New Membership Funding	In 2021, and in alignment with the 2020-2023 ALSC Strategic Plan, ALSC funded (20) two-year ALA and ALSC memberships to students and paraprofessionals who identify as BIPOC. Guided by ALSC's Membership Committee, this group will also receive opportunities to connect with each other and engage in ALSC work virtually.	May-June, 30, 2023	BIPOC US Students and Paraprofessionals.	Free two-year ALA and ALSC membership up to \$150 and guided engagement opportunities.		20	<a href="https://www.ala.org/alsc/new-membership-funding-black-indigenous-and-people-color-bipoc">https://www.ala.org/alsc/new-membership-funding-black-indigenous-and-people-color-bipoc</a>
ALSC – Elizabeth Serrano	ALSC BIPOC Mentoring Membership Funding	ALSC has launched the BIPOC Mentoring Membership Funding Program, which is geared towards recruiting and supporting a diverse pool of mentoring program participants. The objective is to diversify our membership, while also diversifying librarianship and new cohorts of leaders in the field of children's services.	Sept. 15-June, 30, 2022.	BIPOC children's library professionals	Free one-year ALA and ALSC membership up to \$200. Mentorship for 10 months.	Approximately 40 individuals.	New program, no beneficiaries awarded yet.	<a href="https://www.ala.org/alsc/member-center/alsc-bipoc-mentoring-membership-funding">https://www.ala.org/alsc/member-center/alsc-bipoc-mentoring-membership-funding</a>
ALSC – Laura Schulte Cooper	Children & Libraries Journal	The following statement was added to the CAL author guidelines: <i>Our publication is dedicated to sharing content to promote the values of equity, diversity, and inclusion in all aspects of library service to children.</i>	Jan-21	3) BIPOC writers, who may be encouraged by the statement and submit an article manuscript. 2) CAL readers – as the statement may attract new writers with fresh perspectives and story ideas.	N/A	N/A	N/A	<a href="https://www.ala.org/alsc/publications-resources/cal/author-guidelines">https://www.ala.org/alsc/publications-resources/cal/author-guidelines</a>
ALSC – Laura Schulte Cooper	Children & Libraries Journal	The Summer 2021 issue of CAL included an article entitled: "Expanding Representation: ALSC's Equity Fellows Program."	Jun-21	This informational article was shared to raise awareness of the division's Equity Fellows program, which in turn may garner member support for the program into the future and/or generate interest and spark potential future program applicants.	N/A	N/A	N/A	<a href="https://www.ala.org/alsc/publications-resources/cal">https://www.ala.org/alsc/publications-resources/cal</a>
ALSC – Angela Hubbard	Welcoming Spaces National Forum	IMLS grant focused on highlighting best practices of children's museums and libraries around serving recent immigrants and refugees.	September 2019 – August 2022	Patrons who are recent immigrants or refugees. Library and children's museum staff.	Forum participants - \$1,000 honorarium and \$80 worth of video equipment; access to eliminating best practices resource.	24	0	N/A

ALSC – Alena Rivers	ALSC National Research Agenda for Library Service to Children (ages 0-14)	At the 2019 Annual Conference the ALSC Board approved the Research Agenda, led by the Research Agenda Task Force. The agenda includes six priority research areas, that identify related research questions and includes a bibliography of research done under each priority area. One of the six priority areas is Equity, Diversity and Inclusion.	Ongoing	The library community's BIPOC, LGBTQ, children and families and children with disabilities and their families.	Research in EDI continuing and developing concerns will ensure more informed programs and services that support the needs of a diverse library community.	N/A	N/A	<a href="https://www.ala.org/alsc/publications-resources/research-agenda">https://www.ala.org/alsc/publications-resources/research-agenda</a>
ALSC – Alena Rivers	Equity, Diversity & Inclusion Statement and Resource Webpage	ALSC members represent an ever-growing array of diverse backgrounds and experiences. All ALSC members are welcome to engage in ALSC activities and professional development with the expectation that their varied experiences will contribute to thoughtful interactions resulting in more informed work and a broader understanding of the communities they serve. To this end, all ALSC members are expected to support a welcoming environment that is considerate of differing opinions.	Ongoing	ALSC members, as well as their library communities	Providing EDI resources will ensure more informed programs and services that support the needs of a diverse library community.	N/A	N/A	<a href="https://www.ala.org/alsc/aboutalsc/edi_statement">https://www.ala.org/alsc/aboutalsc/edi_statement</a>
ALSC – Alena Rivers	Equity, Diversity & Inclusion Implementation Task Force	The task force's goal is to further the work of the prior Diversity Within ALSC Task Force by promoting awareness of EDI across the division as steps toward a more diverse and inclusive association. The task force's ongoing goal is to see EDI baked into the work of all the committees and on the minds of all ALSC members. Current task force work includes supporting and evaluating the Equity Fellows pilot program. The task force has contributed to other divisional work in an advisory capacity, providing feedback on several projects.	Ongoing – until current task force charge is complete	ALSC members, as well as their library communities	Expansion of resources and understanding EDI will support the work of ALSC members and their library communities.	N/A	N/A	<a href="https://www.ala.org/alsc/aboutalsc/coms/edi-within-alsc-implementation-tf">https://www.ala.org/alsc/aboutalsc/coms/edi-within-alsc-implementation-tf</a>
ALSC – Alena Rivers	BIPOC Discussion Group	The BIPOC Discussion Group convenes face-to-face at each in-person conference and virtually, when conferences are unable to be held in person. The purpose of the BIPOC Discussion Group is to provide a safe, welcome, and open space for ALSC members who identify as Black, Indigenous, and/or People of Color to discuss specific experiences in the profession and the Association. The Discussion Group will benefit ALSC by 1) demonstrating ALSC's commitment to creating a welcoming, inclusive, and safe environment for all members, while acknowledging the inequity that makes a group like this necessary; and 2) supporting ALSC's ongoing work to continually adopt inclusive, equitable practices through feedback from the group's participants.	ALA Annual Conference and other related conferences	BIPOC Members of ALSC	To foster connections and help build networks among underrepresented groups within ALSC.	30-60 discussion group participants	30-60 participants per last five discussion groups	<a href="https://www.ala.org/alsc/bipoc-black-indigenous-and-or-people-color-discussion-group">https://www.ala.org/alsc/bipoc-black-indigenous-and-or-people-color-discussion-group</a>
AMERICAN LIBRARIES								
Sarahita Sinhabhy, editor and publisher	EDIJS content and representation is featured across the product line	Our work is reflective of efforts to embed EDIJS in all stories, not just in special features or during cultural observance months. As journalists and employees living up to ALA's core values, we strive to include individuals of diverse backgrounds and viewpoints as sources, columnists, interview and story subjects, and contributors in our magazine, podcast, online stories, and content online. Our commitment to EDIJS means that we do not steer stories on timely issues related to inequity as it intersects with the profession. Recent examples include coverage of people with disabilities navigating library closures during the pandemic, the increase of independent Black archives, the affect that 9/11 had on Muslim and Arab-American librarians, and inclusive programming and outreach to bridge the digital divide.	Ongoing	ALA membership and nonmembers (who have entry points via public channels like the website, podcast, webinars, etc.)	The stories we tell are relevant, informative, representative, and actionable. In sharing the experiences and expertise of others, we empower members to be EDIJS stewards in their own communities by drawing from the best practices and successes that we	All members (the magazine is considered to be the #1 most-used member benefit, and the AL Direct e-newsletter is #3, according to the Avenue M study), as well as nonmembers	americanlibraries.org	
BOOKLIST								
Booklist	Formed new diverse Advisory Board	Formed new representative Advisory Board	Nov-20	All Booklist readers and subscribers	The new advisory board will provide guidance to all aspects of EDIJS in all areas of Booklist print and digital and all derivative products	All Booklist readers and subscribers	All who interact with Booklist including staff, contractors, reviewers and readers	<a href="https://www.booklistonline.com/staff">https://www.booklistonline.com/staff</a>
Booklist	Launched new diverse patron-facing magazine named Booklist Reader	Launched a new digital publication focused on diverse reading recommendations for all audiences	Launched September 2021 and is published monthly	All readers, library patrons, library workers, he public	Benefits include reading recommendations, interviews and other content that audiences might not otherwise discover	Library patrons and the public	All Booklist subscribers	<a href="https://booklistreader.booklistonline.com/html5/reader/production/default.aspx?pubname=&amp;pubid=004586d-0a63-4b33-826c-66d3ac8b9de7">https://booklistreader.booklistonline.com/html5/reader/production/default.aspx?pubname=&amp;pubid=004586d-0a63-4b33-826c-66d3ac8b9de7</a>
Booklist	Booklist Blog: Reading for Change: Booklist-Recommended Antiracism Titles for All Ages	The events of the past several days are fresh, but these books—and these systemic problems: white supremacy, police brutality, centuries of violence against Black people, carried out time and again by white people—have been here. And we'd be naive to believe that by reading books alone we might somehow upend that reality. We cannot rely on the books to do the work for us, but in the hopes they might serve as catalysts for the self-reflection and group discussion that often preface effective antiracist action, we have developed a list of our own. For those committed to this journey—the reading and the subsequent action—below is a start.	May-20	Adult, Youth, and Audio readers and listeners, library works, library patrons and the public	Educational reading, both non-fiction and fiction titles	All visitors to Booklist's blog and website and cross promoted on I Love Libraries and American Libraries	Continuing visitors to content	<a href="https://www.booklistonline.com/Reading-for-Change-Booklist-Recommended-Antiracism-Titles-for-All-Ages-Briana-Shemrock/pid-975159/">https://www.booklistonline.com/Reading-for-Change-Booklist-Recommended-Antiracism-Titles-for-All-Ages-Briana-Shemrock/pid-975159/</a>
Booklist	Book Links: Athlete Activists by Angela Leeper	White athletes regularly demonstrate their abilities across stadiums, fields, courts, and other sporting venues, many have also taken advantage of the spotlight and used their talents, voices, and actions to break racial, ethnic, and gender barriers, promote social justice, and advocate for accessibility for future generations. The titles below feature athletes notable for both their physical achievements and their personal activism.	September 2021 issue	Booklist subscribers, students and teachers who apply this into classroom curricula	Education supporting activism and social justice	Booklist subscribers	All Booklist subscribers	<a href="https://www.booklistonline.com/Classroom-Connections-Athlete-Activists/pid-9752060/">https://www.booklistonline.com/Classroom-Connections-Athlete-Activists/pid-9752060/</a>
Booklist	Book Links: Celebrating Banned Books Week with Something Happened in Our Town by Fat Scates	This year, Banned Books Week is September 26–October 6, and Jason Reynolds, the National Ambassador for Young People's Literature, is the inaugural honorary chair. "Books Unite Us. Censorship Divides Us" is the theme of this year's celebration, and it's especially pertinent since 8 of the Top 10 Most Challenged Books in 2020 dealt with social issues. The book ranked number 6 on the list is <i>Something Happened in Our Town</i> (2018), written by Marianne Celano, Margaret Celano, and Ann Howard Sautter and illustrated by Janice Yanez.	September 2021 issue	Booklist subscribers, students and teachers who apply this into classroom curricula	Education supporting activism and social justice	Booklist subscribers	All Booklist subscribers	<a href="https://www.booklistonline.com/Classroom-Connections-Celebrating-Banned-Books-Week-with-Something-Happened-in-Our-Town/pid-9752053/">https://www.booklistonline.com/Classroom-Connections-Celebrating-Banned-Books-Week-with-Something-Happened-in-Our-Town/pid-9752053/</a>
Booklist	Webinar: Anti-Racist Education: Building Your Inclusive Collection & Curriculum	Marjane Satrapi's <i>Persepolis</i> is a graphic novel that explores the complexities of growing up in Iran during the Islamic Revolution. The book is a powerful story of resilience and hope, and it is a must-read for anyone interested in understanding the complexities of the world. The book is a powerful story of resilience and hope, and it is a must-read for anyone interested in understanding the complexities of the world.	6-Sep-21	Booklist webinar attendees	Librarians and educators will learn how to use both nonfiction and fiction books in their anti-racist collections and classroom curricula.	Webinar attendees	Webinar attendees and those who view the archived webinar.	<a href="https://ala-events.ala.org/events/2021/09/06/anti-racist-education-building-your-inclusive-collection-and-curriculum">https://ala-events.ala.org/events/2021/09/06/anti-racist-education-building-your-inclusive-collection-and-curriculum</a>
Booklist	Booklist Audio: Listen Up: Social Justice Audio Selections for Book Groups by Heather Booth, published July 2021	The audio format increases the intimacy and impact of these books, and each offers a jumping-off point for spirited and reflective conversations.	July 2021 issue	Booklist subscribers	Educational listening, both non-fiction and fiction titles	Booklist subscribers	Booklist subscribers	<a href="https://www.booklistonline.com/Listen-Up-Social-Justice-Audio-Selections-for-Book-Groups/pid-9750998/">https://www.booklistonline.com/Listen-Up-Social-Justice-Audio-Selections-for-Book-Groups/pid-9750998/</a>
Booklist	Adult Books: Reading Together: Recent Social Justice Choices for Book Groups by Annie Bostrom and others, published July 2021	For most groups we're capturing books that we haven't reviewed yet, so we're looking for recent titles that explore such social-justice issues as racism, sexism, climate change, immigration, and body image from various perspectives, whether factual or imaginative, bold or sensitive, humorous or lyrical. The nonfiction titles below are works of history and analysis, memoir, and essay collections, while the fiction titles cover a broad emotional spectrum, from harrowing to romantic and from witty to uplifting. Written by debut authors and longtime favorites, these vital and relevant book-own commodities will engage readers and invite lively and significant discussions.	July 2021 issue	Booklist subscribers	Library workers and book groups and clubs looking to share social justice titles	Booklist subscribers	Booklist subscribers	<a href="https://www.booklistonline.com/Reading-Together-Recent-Social-Justice-Choices-for-Book-Groups/pid-9750991/">https://www.booklistonline.com/Reading-Together-Recent-Social-Justice-Choices-for-Book-Groups/pid-9750991/</a>
Booklist	Guide to East Asian and East Asian American historical fiction	Since the start of the pandemic, the US has seen a sharp rise in harassment and violence directed at Asian Americans. Despite a North American presence older than the nation itself (Filipino sailors landed in California in the 16th century), and centuries of contributions that have shaped daily American life—from auto, agriculture, technology, books—Americans of Asian descent continue to be attacked for being "other." The high-profile Atlanta murders in March of eight people, including six women of Asian descent, resulted in greater awareness and growing support of Asian and Pacific American communities, but anti-Asian hate crimes continue to escalate, including thousands more attacks that remain unreported.	May 2021 issue	Booklist subscribers and AL Live readers	Educational reading, both non-fiction and fiction titles	Booklist subscribers and AL Live readers	Booklist subscribers and AL Live readers	<a href="https://americanlibrariesmagazine.org/blog/the-scops/recommended-reading-asian-pacific-american-heritage-month/">https://americanlibrariesmagazine.org/blog/the-scops/recommended-reading-asian-pacific-american-heritage-month/</a>
Booklist	Book Links: Indian Residential Schools: A Shameful Story by Kay Weisman	In recent years, North American Indigenous creators have begun documenting their experiences in these schools as a way of healing the personal and intergenerational trauma that persists even today. The titles below, directed at a wide range of audiences, should help readers to empathize with these experiences and provide some understanding of their long-term consequences. Check first with your library about any of these titles directed at sensitive audiences. The book	September 2021 issue	Booklist subscribers	Librarians and educators learn how to use this content in their collections and classroom curricula.	Booklist subscribers	Booklist subscribers	<a href="https://www.booklistonline.com/Classroom-Connections-Indian-Residential-Schools-A-Shameful-Story/pid-9752088/">https://www.booklistonline.com/Classroom-Connections-Indian-Residential-Schools-A-Shameful-Story/pid-9752088/</a>
COMMUNICATIONS & MARKETING OFFICE								
Communications and Marketing Office – Stephanie Hlywak, Director	I Love My Librarian Award	The I Love My Librarian Award invites library users to recognize the accomplishments of exceptional public, school, college, community college, or university librarians. Each year up to 10 librarians are selected. Each winner receives a \$5,000 cash award in recognition of their outstanding service to their community.	Annual award started in 2008. Award will continue as long as funding allows.	Although this award is open to all librarians, regardless of their race, ethnicity, or disability status, the award committee makes a concerted effort to ensure each winner cohort includes a diverse representation of librarians. For example, in 2020 winners included two Asian librarians, one Latina, and one Native American. This group also included one of the first honorees with a visible disability.	Each winner receives \$5000 in prize money and \$750 travel stipend to attend the award ceremony (in years when the award has been celebrated virtually, these funds have been given as unrestricted gifts to winners' libraries).	10	130	<a href="http://www.ilovelibraries.org/lovelymylibrarian">http://www.ilovelibraries.org/lovelymylibrarian</a>
CHOICE								
Choice, Mark Cummings	Toward Inclusive Excellence™	Toward Inclusive Excellence explores issues of equity, diversity, and inclusion, particularly, though not exclusively, as they affect the academic library community. This web-based service incorporates weekly blog posts as well as occasional podcasts and webinars, in which contributors explore the intricacies of racial identity as they relate to implicit bias, academic racism, and academic excellence and social justice.	Ongoing. Content published weekly	Information professionals, undergraduates, and faculty seeking to understand racism from new perspectives and to promote racial justice on their campuses.	Development of a pool of knowledge and actionable resources for those seeking to understand racism from new perspectives and to promote racial justice on their campuses.	Not quantifiable	Over 5,000 site visits, inception (4/7/21) to date	<a href="https://www.choice360.org/toward-inclusive-excellence/">https://www.choice360.org/toward-inclusive-excellence/</a>
Core: Leadership, Infrastructure, Futures.								

Core: Leadership, Infrastructure, Futures, Brooke Morris-Chott, Advocacy & EDI Program Officer	Preservation in Action (PIA)	Promotes an understanding of the importance of preservation while engaging with cultural heritage collections in ALA conference locations.	Annually (during ALA Annual)	ALA Annual attendees, the local communities served during event, and general public.	Conference attendees gain/further preservation skills and knowledge of the cultural heritage of the community where event is held; the local communities benefit from having a community collection preserved; and the general public learns about the culture and community collection being preserved and gains tools they can use on their own personal and family collections.	15 attendees and community/public at large	60 attendees and community/public at large	<a href="https://www.ala.org/core/sboscac/sra">https://www.ala.org/core/sboscac/sra</a>
Core: Leadership, Infrastructure, Futures, Brooke Morris-Chott, Advocacy & EDI Program Officer	Preservation Week (a Core/ALA public awareness event)	Promotes personal, family, and community preservation and conservation as well as cultural and community heritage.	Annually at the end of April	general public	Gain knowledge of preservation and conservation and learn more about preserving their own collections. Gain a better understanding of their communities and their community culture and heritage.	public at large	public at large	<a href="https://www.ala.org/acts/preservationweek">https://www.ala.org/acts/preservationweek</a>
Core: Leadership, Infrastructure, Futures, Brooke Morris-Chott, Advocacy & EDI Program Officer	Preservation Outreach Committee	Develops, facilitates, maintains and expands preservation focused outreach and service on behalf of Core through the Preservation Week and Preservation in Action initiatives.	N/A	Core and all ALA members and general public through programming and initiatives such as PIA and Preservation Week.	ALA and Core members learn more about the preservation field of librarianship and collection management (particularly special collections). Public gains knowledge about preservation and maintaining their own personal and community collections.	N/A	N/A	<a href="https://www.ala.org/core/member-center/committees/preservation-outreach-committee">https://www.ala.org/core/member-center/committees/preservation-outreach-committee</a>
Core: Leadership, Infrastructure, Futures, Brooke Morris-Chott, Advocacy & EDI Program Officer	Advocacy Coordination Committee	Informs and advises Core members on the advocacy needs of libraries and library workers within the areas of library leadership, cataloging, metadata, technical services, library technology, archiving, and preservation and conservation; identifies, evaluates, and makes recommendations on issues, legislation, and services concerning the areas of focus for Core members. Provides a forum within Core to share information and legislative analysis of current and impending federal laws and regulations to keep Core members apprised of current issues affecting libraries;	N/A	Core members, librarians, libraries, and institutions	State and local libraries are provided with advice and offered collaborations and assistance to state and local library entities when federal legislation has implications at the state and local level.	N/A	N/A	<a href="https://www.ala.org/core/member-center/committees/advocacy-coordination-committee">https://www.ala.org/core/member-center/committees/advocacy-coordination-committee</a>
Core: Leadership, Infrastructure, Futures, Brooke Morris-Chott, Advocacy & EDI Program Officer	Diversity and Inclusion Committee	Establishes and maintains anti-racism, diversity, and inclusion as fundamental principles of Core; articulates the desired facets of anti-racism, diversity, and inclusion within Core; proposes appropriate goals for anti-racism, diversity, and inclusion in Core membership, participation, and programming and metrics for measuring success; advises and coordinates with other Core committees, project teams, and the governing board on strategies to meet these goals; coordinates with other groups within ALA on EDI issues in the library workplace.	N/A	Core members	Core members gain the necessary training and resources needed to practice and maintain EDI and EDI-related programming and initiatives within their libraries, institutions, and museums.	N/A	N/A	<a href="https://www.ala.org/core/member-center/committees/diversity-and-inclusion-committee">https://www.ala.org/core/member-center/committees/diversity-and-inclusion-committee</a>
Core: Leadership, Infrastructure, Futures, Brooke Morris-Chott, Advocacy & EDI Program Officer	International Relations Committee	Leads and coordinates international relations activities. Engages with counterpart groups of librarians abroad, particularly those in Core's areas of interest, and encourages participation in international conferences and other activities. Reviews and recommends to the Core Board candidates for IFLA section standing committees. Reviews and awards the Online Course Scholarship for Library Professionals from Developing Countries.	N/A	Core members, library school students, international librarians	International members of Core are offered support and resources in the areas that Core focuses on; provides a slate of Core candidates for IFLA section standing committees in years the division is asked to provide them; and administers the Online Course Scholarship for Library Professionals from Developing Countries.	N/A	N/A	<a href="https://www.ala.org/core/member-center/committees/international-relations-committee">https://www.ala.org/core/member-center/committees/international-relations-committee</a>
Core: Leadership, Infrastructure, Futures, Brooke Morris-Chott, Advocacy & EDI Program Officer	Access and Equity Section	Dedicated to advocacy and equity in areas such as accessibility, copyright, dismantling systemic racism, equity of access, open access, net neutrality, privacy, and representative collections in all types of libraries.	N/A	Core and ALA members	Gains support in programming and training in equity, diversity, and inclusion, both within the division and the profession.	N/A	N/A	<a href="https://www.ala.org/core/member-center/sections/access-and-equity">https://www.ala.org/core/member-center/sections/access-and-equity</a>
Core: Leadership, Infrastructure, Futures, Jenny Levine, Director of Advocacy, Connections, and Engagement	Women, Non-Binary, and Trans Workers in Library Technology Interest Group	Provides a valuable place and voice for women, non-binary, and trans workers within library technology, voices that are often ignored or overlooked.	N/A	Library workers who identify as female, non-binary, and trans	Support, a safe space, and a platform for discussing issues relevant to library workers who work within library technology and identify as female, non-binary, and trans.	N/A	N/A	<a href="https://www.ala.org/core/member-center/interest-groups/women-non-binary-and-trans-workers-in-library-technology">https://www.ala.org/core/member-center/interest-groups/women-non-binary-and-trans-workers-in-library-technology</a>
Core: Leadership, Infrastructure, Futures, Jenny Levine, Director of Advocacy, Connections, and Engagement	Women, Non-Binary, and Trans Administrators Interest Group	Provides a forum for discussion of problems of particular concern to women, non-binary, and trans people in administrative positions.	N/A	Library administrators who identify as female, non-binary, and trans	Support, a safe space, and a platform for discussing issues relevant to library administrators who work within library technology and identify as female, non-binary, and trans.	N/A	N/A	<a href="https://www.ala.org/core/member-center/interest-groups/women-non-binary-and-trans-administrators">https://www.ala.org/core/member-center/interest-groups/women-non-binary-and-trans-administrators</a>
Core: Leadership, Infrastructure, Futures, Jenny Levine, Director of Advocacy, Connections, and Engagement	Open Access Interest Group	Brings together library staff interested in open access (OA) publishing, including, but not limited to: OA and collection development; transformative agreements; library sponsored author funds; and OA library publishing. The interest group will keep members informed of new policies and practices in this area.	N/A	Library workers interested in OA publishing	Learn about new policies and practices in OA publishing.	N/A	N/A	<a href="https://www.ala.org/core/member-center/interest-groups/open-access">https://www.ala.org/core/member-center/interest-groups/open-access</a>
Core: Leadership, Infrastructure, Futures, Jenny Levine, Director of Advocacy, Connections, and Engagement and Brooke Morris-Chott, Advocacy & EDI Program Officer	Christian Lawew Memorial Scholarship in Library and Information Technology	The Core/Christian (Chris) Lawew Memorial Scholarship provides tuition help for library school students who want to follow a career in the library and information technology field and who demonstrate academic excellence, leadership, and a vision in this area. It provides \$3,000 for studying in an ALA Accredited Master of Library Science (MLS) program.	N/A	Library school students interested in a career in library and information technology	\$3,000 for studying in an ALA Accredited MLS program	N/A	N/A	<a href="https://www.ala.org/core/awards-scholarships/christian-lawew-memorial-scholarship">https://www.ala.org/core/awards-scholarships/christian-lawew-memorial-scholarship</a>
Core: Leadership, Infrastructure, Futures, Jenny Levine, Director of Advocacy, Connections, and Engagement and Brooke Morris-Chott, Advocacy & EDI Program Officer	Core/ODCLC Spectrum Scholarship in Library and Information Technology	Actively recruits and provides scholarships to American Indian/Alaska Native, Asian, Black/African American, Hispanic/Latino, Middle Eastern and North African, and/or Native Hawaiian/Other Pacific Islander students to assist them with obtaining a graduate degree and leadership positions within the profession and ALA. The Core/ODCLC Spectrum Scholarship in Library and Information Technology is designed to address the specific issue of underrepresentation of racially and ethnically diverse librarians within library technology.	N/A	BIPOC graduate students who wish to pursue leadership positions within the profession.	Each scholar receives \$5,000 from ALA to combat the rising cost of graduate education, as well as \$1,500 to attend the Spectrum Scholarship luncheon held during the ALA Annual Conference.	N/A	N/A	<a href="https://www.ala.org/core/awards-scholarships/spectrum-scholarship">https://www.ala.org/core/awards-scholarships/spectrum-scholarship</a>
Core: Leadership, Infrastructure, Futures, Jenny Levine, Director of Advocacy, Connections, and Engagement and Brooke Morris-Chott, Advocacy & EDI Program Officer	Online Course Scholarship for Library Professionals from Developing Countries	Helps library professionals from developing countries stay current with the latest trends and developments the Core areas of focus specified below and enhance their professional knowledge and skills in librarianship and information science.	N/A*Please note: N/A	Library professionals from developing countries	One free seat per Core online continuing education course session.	N/A	N/A	<a href="https://www.ala.org/core/awards-scholarships/online-course-scholarship">https://www.ala.org/core/awards-scholarships/online-course-scholarship</a>
CHAPTER AND INTERNATIONAL RELATIONS								
IRQ/Delin Guerra	ALA-FIL Free Pass Program to Guadalajara Book Fair	Support 150 members each year to Guadalajara Book Fair to review and buy Spanish language materials	End of Nov Start of Dec every year	Librarians gain experience and knowledge on Spanish publishing. Spanish-speaking populations across U.S. benefit from new material	\$100 travel stipend provide by ALA to each member	150 if all slots are taken	3,000 members over 21 years. Hundreds of thousands Spanish speaking users of libraries in U.S.	<a href="https://www.ala.org/aboutala/offices/rs/awardsactivities/guadalajara-book-fair?text=The%20deadline%20for%20application%20to%20receive%20proceeding%20">https://www.ala.org/aboutala/offices/rs/awardsactivities/guadalajara-book-fair?text=The%20deadline%20for%20application%20to%20receive%20proceeding%20</a>
IRQ/Michael Dowling	Sharjah International Library Conference	Yearly conference in Sharjah, UAE for members and non-members from the Middle East region (and South Asia, Africa)	November 9-11	Members and non-members able to attend an ALA event in their region	NA	200 non-members over eight years.	2,000 members and non-members over eight years.	<a href="https://www.sifala.com/">https://www.sifala.com/</a>
CRO/Mariel Colbert	ODLOS EDI Trainings	CRO staff part of training staff for EDI	Throughout the year	Attendees of training sessions at Chapter conferences, library in-service and CE events	NA	300 since CRO started assisting in FY20	300 since CRO started assisting in FY20	<a href="https://www.ala.org/advocacy/diversity/continuing-education/trainings-strategic-planning">https://www.ala.org/advocacy/diversity/continuing-education/trainings-strategic-planning</a>
DEVELOPMENT								
Trace Hall and Anne Manley	Let Our Legacy Be Justice Grant Initiative	Applied for and received \$2M grant from Mellon Foundation to support ODLOS administration and general programming related to reaching BIPOC library communities and staff, as well as currently incarcerated readers and learners.	Through end of FY22	BIPOC library users, staff, and incarcerated readers and learners	advocacy, programs and services			
EDITIONS - PUBLISHING UNIT								
Editions, Rachel Chance	EDISI content represented across the product line	Book: <i>Libraries and Incarceration: Identifying Barriers, Strengthening Access</i> by Jeanie Austin	Due to publish 10/25/21	People who are or have been incarcerated or detained and their families; people from groups heavily impacted by or at risk of incarceration or detention: Black, Indigenous, and people of color, LGBTQ people, and people who are in poverty; library staff serving these populations; US students; and people engaged in restorative justice and prison reform and abolition initiatives.	Library staff and US students bring a better understanding of carceral systems in the United States to their work to better support and protect the safety of impacted by mass incarceration or detention; of mass incarceration and abolition initiatives.	The initial print run is 1,000 copies, with a little over half expected to sell in the first year. One or both may be available as an e-book through libraries.	n/a	<a href="https://www.alastore.ala.org/ital">https://www.alastore.ala.org/ital</a>
Editions, Rachel Chance	EDISI content represented across the product line	Books: 1) <i>Cultural Humility</i> (Special Report series) by David A. Hurley, Sarah R. Kostecky, and Lori Townsend and 2) <i>Libraries and Cultural Humility</i> by same author team	1) Due to publish early 2022 and 2) mid-2022	Public, school, academic, and special library staff and the BIPOC people in the communities they serve.	The most important element is to support library users and potential library users. When library staff practice cultural	The initial print run is tentatively 1,500 copies, with a little less than half expected to sell in the first year. One or both may be available as an e-book through libraries.	n/a	3) <a href="https://www.alastore.ala.org/culhum">https://www.alastore.ala.org/culhum</a> and 2) <a href="https://www.alastore.ala.org/ital">https://www.alastore.ala.org/ital</a> listing to come
Editions, Rachel Chance	EDISI content represented across the product line	Book: <i>Foundations of Social Justice</i> by Nicole A. Cooke	Due to publish mid-fall 2022			The initial print run is tentatively 1,500 copies, with a little less than half expected to sell in the first year. It will also	n/a	<a href="https://www.alastore.ala.org/jfoundations">https://www.alastore.ala.org/jfoundations</a>



							be available as an e-book through libraries.		
Editions, Jamie Santoro	EDIJS content represented across the product line	Book: Let's Talk About Race in Storytimes by Jessica Anne Bratt	Due to publish: 1/10/22	Library staff serving children, and all who present story times.	Library staff serving children will be guided in integrating anti-racism work into their professional practice through adapted story times, tools for self-reflection, and discussion starters.	Anticipated FY22 sales: 440 copies.	n/a	<a href="https://www.alastore.ala.org/racinstorytimes">https://www.alastore.ala.org/racinstorytimes</a>	
Editions, Jamie Santoro	EDIJS content represented across the product line	Book: Library Programming for Autistic Children and Teens by Amelia Anderson.	Publication date: 4/22/21	Library staff serving children and teens in both public library and K-12 educational settings.	Library workers will be better informed and prepared to serve members of the autistic community.	Anticipated FY22 sales: 440 copies.	n/a	<a href="https://www.alastore.ala.org/ACTprograms2">https://www.alastore.ala.org/ACTprograms2</a>	
Editions, Jamie Santoro	EDIJS content represented across the product line	Book: Library Programming for Adults with Developmental Disabilities by Barbara Klipper and Carrie Banks	Publication date: 4/21/21	Library workers	Library workers will be more prepared to serve members of the autistic community.	Anticipated FY22 sales: 440 copies.	n/a	<a href="https://www.alastore.ala.org/DDprograms">https://www.alastore.ala.org/DDprograms</a>	
Editions, Jamie Santoro	EDIJS content represented across the product line	Book: Asian Americans in Story by Sarah Park Dahlen and Paul Lai	Due to publish: 4/9/2022	US instructors, educators, librarians, students, and scholars.	US instructors, educators, librarians, students, and scholars will better understand Asian American children's and young adult literature in a historical, sociocultural, and political context.	Anticipated FY22 sales: 440 copies.	n/a	<a href="https://www.alastore.ala.org/aastory">https://www.alastore.ala.org/aastory</a>	
Editions, Jill Hillemeier and Rob Christopher	Promotion of the EDIJS content represented across the product line	1) Spread in the catalog featuring EDI books and letter from ODLOS 2) Landing page on ALA Store linking to EDI books and ALA Graphics products 3) eblast featuring EDI books	Featured in FY22 Catalog and August 2021 eblast -ongoing	Library staff and US instructors/students who are looking for resources on EDI topics.	Provide essential resources for libraries to further the core values of equity, diversity inclusion, literacy, and outreach.	Catalogs will reach 90k+ members, potential members, and customers with this information in FY22. Eblasts will reach 120k members, potential members, and customers with this information in FY22.	N/A	<a href="https://www.alastore.ala.org/EDI">https://www.alastore.ala.org/EDI</a> <a href="https://alaeditions.org/catalog01/">https://alaeditions.org/catalog01/</a>	
Editions, Rachel Chance	EDIJS content represented across the product line	Book: Foundations of Intellectual Freedom by Emily J.M. Knox	US scholars, instructors, and students.				n/a	<a href="https://www.alastore.ala.org/ffoundations">https://www.alastore.ala.org/ffoundations</a>	
Editions, Rachel Chance	EDIJS content represented across the product line	Book: Media Literacy for Justice: Lessons for Changing the World by Belinha S. De Abreu					n/a	<a href="https://www.alastore.ala.org/ml4j">https://www.alastore.ala.org/ml4j</a>	
Editions, Rachel Chance	EDIJS content represented across the product line	Book: Serving the Underserved: Strategies for Inclusive Community Engagement edited by Catharine Barnholdt					n/a	<a href="https://www.alastore.ala.org/underserved">https://www.alastore.ala.org/underserved</a>	
Editions, Rachel Chance	EDIJS content represented across the product line	Book co-published with the Society of American Archivists: Decolonial Archival Futures (Archival Futures series) by Krista McCracken and Skylee-Storm Hogan			Decolonial archival practices involve thinking about and consciously changing how historical knowledge is produced, communicated, and preserved. And though it is especially critical that scholars and archivists who work with records by and about Indigenous people critically consider the implications of their work, this perspective is an essential one for all members of the profession. By examining archival practices that push against and		n/a	<a href="https://www.alastore.ala.org/decarfut">https://www.alastore.ala.org/decarfut</a>	
Editions, Rachel Chance		Publication of Prison Library Standards revision							
Editions, Rachel Chance	EDIJS content represented across the product line	Two-volume set of Special Reports on Black and African Americans' experiences in libraries: 1) Narratives of (Dis)enfranchisement: Reckoning with the History of Libraries and the Black and African American Experience by Tracey Overbey and Amanda L. Folk and 2) Narratives of (Dis)engagement: Exploring Black and African American Students' Experiences in Libraries by Amanda L. Folk and Tracey Overbey	First Report due to publish late 2021 or early 2022.				n/a	<a href="http://www.alastore.ala.org/nw1">Exist book in the set: https://www.alastore.ala.org/nw1</a>	
ALA Editions/ALA Neal-Schuman, Samantha Kunder, Managing Editor	Updated Author Guide	Author guide used by potential and current authors and freelance copy editors and proofreaders was updated to include personal pronoun usage examples and ODLOS resources authors to reference while creating content that reflects the unique experiences and backgrounds of librarianship.	Ongoing	Readers, library staff				<a href="https://alaeditions.org/wp-content/uploads/ALA-Author-Guide_2020.pdf">https://alaeditions.org/wp-content/uploads/ALA-Author-Guide_2020.pdf</a>	
Editions, Rachel Chance	EDIJS content represented across the product line	Book: Power Lines: Connecting with Teens in Urban Communities Through Media Literacy by Jinnelka Anderson and Kelly Czarnicki	Due to publish early 2022.	Minoritized and economically disadvantaged youth in urban communities and the library staff who serve them.	Library staff who serve teens in urban communities will be able to provide innovative and transformative learning experiences that encourage the development of essential information and digital literacies.		n/a	<a href="https://www.alastore.ala.org/powerlines">https://www.alastore.ala.org/powerlines</a>	
GRAPHICS									
Rachel Johnson, ALA Graphics	EDI content represented across the product line	Posters, bookmarks, and other incentives, including those created in collaboration with units and affiliates such as AISC, OIF, ABOS, BCALA, and Core to ensure that all library users can see themselves and their communities in promotional materials and incentives.	Ongoing	All library users, supporters, and workers, especially in school and public libraries, and library staff who seek diverse tools for promoting reading and literacy. This includes materials for special events such as NLW, Banned Books Week, Dia, and National Conference of African American Librarians and for national monthly celebrations including American Indian Heritage, Asian/Pacific American Heritage, Black History, Hispanic Heritage, and Women's History.	Diverse products.  \$900 in royalties to ABOS in FY21.  \$220 in royalties to BCALA/NCAAL in FY21.  \$1,155 in royalties to Core to be used for Core memberships for library workers in need.			<a href="http://Alastore.ala.org">Alastore.ala.org</a> and <a href="http://bit.ly/GraphicsGiftShop">bit.ly/GraphicsGiftShop</a>	

MEMBER RELATION SERVICES - MRS

Graphic Novels & Comics Round Table & BCALA, Tina Coleman - Staff Liaison	Black Lives Matter, Black Literature Matters Comics Reading List & supplemental lists	This list of 50 comics titles for Juvenile, Teen (YA), and Adult audiences is centered on Black creators, Black stories, and Black histories for all ages. The goal of this list is not to be a prescriptive spectrum of all the subject or format content out there in the landscape of Black stories or comics. Rather, this is a step, another step, towards building collections and conversations that spark hope, demand justice, address erasure, and agitate for learning - using both sides of our brains through words and pictures. Because when 'Black lives are lost, Black stories are lost'	9/23/2020 - present	Black comics creators, publishers, and other comics industry professionals, BIPOC communities, library staff serving BIPOC communities	The stated goal is to build these lists as collection development tools to highlight and raise Black voices and stories, highlight and celebrate Black creators (both within libraries and in the comics community).	unknown	unknown	<a href="https://www.ala.org/1/gncrt/tools/black-lives-matter-black-literature-matters-comics-reading-list">https://www.ala.org/1/gncrt/tools/black-lives-matter-black-literature-matters-comics-reading-list</a>
MRS, Melissa Walling - Staff	ALA Connect Live	Patty Wong is dedicating the November, 2021 ALA Connect Live to showcasing best practices in advancing EDI efforts within library communities. The panels will also discuss how intellectual freedom challenges can become a battleground for these issues.	November 18, 2021	This event is open to all library workers	The expected outcome is that attendees will have some best practices they can apply within their libraries.	We expect 300 attendees	N/A	<a href="https://www.ala.org/membership/ala-connect-live-series">https://www.ala.org/membership/ala-connect-live-series</a>
Graphic Novels & Comics Round Table, Tina Coleman - Staff Liaison	Will Eisner Graphic Novel Grants for Libraries (2 Growth Grants & 1 Innovation Grant awarded annually)	The Eisner Grants are meant to support "library programs, services, and collections that promote graphic novels to patrons and communities". Three grants are awarded annually - 2 growth grants awarded to libraries that have existing comics collections and programming that would like to "level-up" what they are doing, and 1 innovation grant awarded to a library that isn't currently offering programming or highlighting comics but wants to. Each grant provides funds for programming, professional development (travel to ALA Annual Conference), collection development, as well as collections of Will Eisner's works and a selection of the Eisner Award nominated titles for that year.	2014 - 2023 Agreement with Eisner Foundation expires in 2023, possible renewal)	While initially not part of the stated criteria the grant juries have continually awarded the grants to projects highlighting or serving underserved communities - libraries in prisons, school libraries in immigrant or ESL communities, tribal libraries, etc. The grant supports the missions the libraries serve as well as the library staff.	The expected outcome is that attendees will have some best practices they can apply within their libraries. Each grant includes: \$1,000 for graphic novel program, \$1,000 travel stipend for ALA Annual Conference, \$2,000 voucher with Diamond Comics Distribution, as well as collections of Will Eisner's works and a selection of the Eisner Award nominated titles for that year (about \$3,000 value)	Three projects will receive grants this year	19	<a href="https://www.ala.org/1/gncrt/eisner">https://www.ala.org/1/gncrt/eisner</a>

OFFICE FOR DIVERSITY, LITERACY AND OUTREACH SERVICES

ODLOS - Kristin Lahurd	ODLOS - Continuing Education: EDI Trainings	The Office for Diversity, Literacy and Outreach Services (ODLOS) offers a robust continuing education portfolio, including trainings, strategic planning, and webinars in our focus areas of equity, diversity, and inclusion, literacy, and outreach. Our trainings are developed through the lens of social justice and libraries.	ongoing	Library workers in various types of library institutions	Library workers receive foundational training on equity, diversity, inclusion to improve their self-awareness and systems analysis and ultimately, their library services and policies.	Based on numbers reached during FY21, we anticipate training approximately 1500 library workers in FY22.	Thousands	<a href="https://www.ala.org/advocacy/diversity/continuing-education/trainings-strategic-planning">https://www.ala.org/advocacy/diversity/continuing-education/trainings-strategic-planning</a>
ODLOS - Kevin Strouder	ODLOS - EDI Assembly	The purpose of the EDI Assembly is to provide a forum for all groups within ALA and ALA-affiliated organizations working on initiatives related to equity, diversity, and inclusion to discuss their activities, identify opportunities for collaboration and coordination, and explore new initiatives related to the association's strategic direction for equity, diversity, and inclusion.	July 1, 2021 - June 30 - 2022	ALA members and affiliates	A forum for ALA members and MALCOS representatives to share resources and share areas of improvement with regards to EDI at ALA.	141 members	150 as of September 13	<a href="https://www.ala.org/aboutala/edi-assembly">https://www.ala.org/aboutala/edi-assembly</a>
ODLOS - Kristin Lahurd	ODLOS - Libraries Respond	The ALA Office for Diversity, Literacy and Outreach Services has created Libraries Respond as a space for us to help keep current events in conversation with libraries' ongoing work in and commitment to equity, diversity, and inclusion. This page is a resource for the library community to share information, find resources, and connect as they serve their communities.	ongoing	Library workers who are looking to address current events.	Resources and examples on how library workers can address current events.	n/a	130,464 page views since 2017	<a href="https://www.ala.org/advocacy/diversity/libraries-respond">https://www.ala.org/advocacy/diversity/libraries-respond</a>
ODLOS - Amber Hayes	ODLOS - Rural Libraries Summit	ALA's Rural, Native, and Tribal Libraries of All Kinds Committee (BENTON) invited rural library workers to the inaugural Rural Libraries Summit. During this virtual two-day summit, library workers had the opportunity to hear new innovative initiatives happening at libraries across the United States, share challenges and successes, and network with peers. The summit was May 25-26.	May 25-26	Rural library workers who are looking to connect.	Networking opportunities, opportunities to hear directly from ALA leadership, new resources from other library workers	120 attendees	120 rural library workers so far.	<a href="https://www.ala.org/advocacy/diversity/2021-rural-summit">https://www.ala.org/advocacy/diversity/2021-rural-summit</a>
ODLOS - Kevin Strouder	ODLOS - Spectrum	The Spectrum Scholarship Program actively recruits and provides scholarships to American Indian/Alaska Native, Asian, Black/African American, Hispanic/Latino, Middle Eastern and North African, and/or Native Hawaiian/Other Pacific Islander students to assist them with obtaining a graduate degree and leadership positions within the profession and ALA.	Applications open September 1 - March 1.	BIPOC library students.	Scholarship funds and professional development opportunity at ALA Annual	60 scholars	Over 1,300 students	<a href="https://www.ala.org/advocacy/spectrum">https://www.ala.org/advocacy/spectrum</a>

ODLOS - Kristin Lahurd	ODLOS: Building Cultural Proficiencies for Racial Equity Task Force	The task force is charged to create a framework for cultural proficiencies in racial equity that can be used in public and academic libraries through:  Scanning the environment, including review of relevant documents to identify literature and similar statements and frameworks related to racial equity; Drafting the framework; Seeking comment from stakeholders and the library community on the draft, and revising as needed	Ongoing, started January 2020	Public and academic libraries, at the individual and organizational levels	Access to aggregated survey data on racial equity and inequity in libraries and a framework that libraries can use for strategic planning and assessment; hiring, retention and other practices; and building accountability for eradicating white supremacy in their services	TBD (framework has not been released, nor have survey results)	The task force currently includes 10 volunteers	<a href="https://www.ala.org/news/member-news/2020/05/acrf-ai-odlos-and-pla-announce-joint-cultural-competencies-task-force">https://www.ala.org/news/member-news/2020/05/acrf-ai-odlos-and-pla-announce-joint-cultural-competencies-task-force</a>
	ODLOS - Committee on Diversity DEI Scorecard	the DEI Scorecard promotes accountability and transparency in gauging institutional performance on five measures of DEI presented in rubric format along with supplemental reflection questions: Embeddedness of DEI into the Culture and Climate of the Organization; Training and Education; Recruitment, Hiring, Retention, and Promotion; Budget Priorities for DEI and Data Practices. Development of the DEI Scorecard was informed by ALA's Core Values of Librarianship, ACB, Diversity Standards; Cultural Competency for Academic Libraries, and other report card/scorecard measures of DEI performance. The DEI Scorecard can be used as-is or adapted to accommodate local context.	n/a		Library workers have a template to evaluate their DEI efforts	n/a	n/a	<a href="https://www.ala.org/news/member-news/2021/07/alas-committee-diversity-announces-diversity-equity-and-inclusion-dei-scorecard">https://www.ala.org/news/member-news/2021/07/alas-committee-diversity-announces-diversity-equity-and-inclusion-dei-scorecard</a>

OFFICE OF INTELLECTUAL FREEDOM - OIF									
Deborah Caldwell-Stone	Office for Intellectual Freedom	Jeroy C. Merritt Humanitarian Fund (ALA Related Organization)	Direct grants in aid to library workers experiencing employment discrimination due to race, sex or gender identity, ethnicity, or religion OR due to defense of intellectual freedom	1973 to present	Library workers	Funding for legal fees, living expenses as needed	Estimated: 3-4 grantees	More than 30	Merrittfund.org
	Office for Intellectual Freedom/Intellectual Freedom Committee	Intellectual Freedom and Social Justice Working Group	Charged with holding space for conversations and education around the intellectual freedom and social justice and tasked by Council resolution to identify alternatives to neutrality rhetoric.	OIF subgroup since 12/20; designated Executive Board Working Group since July 2021	Members, library workers	Align policies, best practices to ED/SJ goals and values	Unknown at this time	N/A	<a href="https://connect.ala.org/communities/community-home?CommunityKey=55dbc931-1802-4ea3-ae87-76d77b6ca218">https://connect.ala.org/communities/community-home?CommunityKey=55dbc931-1802-4ea3-ae87-76d77b6ca218</a>
	Office for Intellectual Freedom	Kristin Pellet, Deborah Caldwell-Stone	Right CRT Toolkit	Statement/Toolkit to aid library workers protecting access to materials addressing racism, BIPOC history and experience	May 2021 to present	Members, library workers, library users	Access to advocacy tools to defend and retain diverse materials in library collections	Intended wide distribution to members and library workers	N/A

PUBLIC LIBRARY ASSOCIATION									
PLA, Scott Allen	Social Justice and Public Libraries: Equity Starts with Us regional training events	1.5 day training event taught by PLA EDISJ Committee members and consultant Mia Henry.	Feb 2019 –7 delayed due to COVID)	Public library staff	Access to training	TBD, depending on in-person conditions	~400		<a href="https://www.ala.org/pla/education/emperson/equity">https://www.ala.org/pla/education/emperson/equity</a>
PLA, Scott Allen for PLA (ODLOS leads this work)	Building Cultural Proficiencies for Racial Equity Framework (joint with ACRL/ARL/ODLOS)	This framework will serve as a foundational resource to help public and academic libraries build inclusive cultures, within libraries and their broader communities, through guidelines on the development and implementation of organizational policies and professional practices that support diverse libraries with a diverse workforce.	2019-2022	Public, academic and research library staff	TBD	TBD		0	n/a
PLA, Scott Allen	Justice at Work: A Training on Power, Oppression, Resistance and Solidarity	Virtual training for public library staff on identity and power; understand how oppression plays out historically and currently, and libraries' role in building a more just world. Consultant Mia Henry is developing content with PLA's EDISJ Committee in fall 2021 and will co-launch and promote in 2022.	2022-ongoing	Public library staff	Access to training	200-300		0	Forthcoming
PLA, Mary Hersh	Inclusive Internship Initiative (III)	The Inclusive Internship Initiative (III) offers paid, summer-long internships to high school students at their local public library. Over the course of the summer, each intern works with their library mentor on a community-based learning project. Through III, students from diverse backgrounds are introduced to careers in librarianship; library mentors practice leadership skills, and host libraries grow new audiences through outreach and programming.	2017-2021	Public library staff, high school students	Access to training, networking, and mentorship; introduction to librarianship as a career	42 interns and 44 mentors		200 interns, 200 mentors	<a href="https://www.ala.org/pla/initiatives/glinterns">https://www.ala.org/pla/initiatives/glinterns</a>
PLA, Mary Hersh	Leadership Lab: Embedding EDI and Library Leaders	The systems of public library services have evolved with a constant mission to serve the public good but have demonstrated that equal access is not equitable for all. Embedding equity, diversity, and inclusion in library leadership development requires a multi-pronged approach that relies on building trust internally with library staff and externally with community assets. This workshop—consisting of six live virtual classroom sessions—will explore transformation through the lens of the current social crises, emphasizing equity, diversity, inclusion, and social justice (EDISJ) principles and approaches, supplemented by leadership development and asset-based community development tools.	Jan 2021-March 2021	Public Library Staff	Training and networking		100	100	<a href="https://www.ala.org/pla/education/onlinelearning/leadershiplab">https://www.ala.org/pla/education/onlinelearning/leadershiplab</a>
PLA, Angela Maycock	Webinar Captioning	PLA adds captioning to all webinars	Sept. 2020-ongoing	Public library staff, other webinar registrants	Access to training across abilities	+/-500			
PLA, Kathleen Hughes	EDI Focused edition of Public Libraries Magazine	The July/August issue was focused entirely on EDISJ topics	Aug-21	All PLA members		8,000 subscribers		0	<a href="https://edition.pagesuite-professional.co.uk/html5/reader/production/default.aspx?pubname=&amp;edid=c4432a24-cd76-4c23-bd8b-6a6ba2cde304">https://edition.pagesuite-professional.co.uk/html5/reader/production/default.aspx?pubname=&amp;edid=c4432a24-cd76-4c23-bd8b-6a6ba2cde304</a>
PLA, Angela Maycock	PLA Conference Proposal Review Rubric	EDISJ measure added to proposal submission and review criteria: "Does the program have the potential to help PLA and its members advance the strategic goals and values of equity, diversity, inclusion, and social justice?"	2020-ongoing	Public library staff					<a href="https://www.placonference.org/documents/PLA2022_Proposal_ReviewRubric.pdf">https://www.placonference.org/documents/PLA2022_Proposal_ReviewRubric.pdf</a>
PLA, Lian Drago	PLA Conference Scholarships	In partnership with Spectrum, offer conference registration and stipend to selected BIPOC attendees	2016-ongoing	Public library staff, past Spectrum scholars	Access to training and networking, direct funding support	10 in '22		40	<a href="https://www.ala.org/news/member-news/2018/02/ten-ala-spectrum-scholars-awarded-grants-attend-pla-2018-conference">https://www.ala.org/news/member-news/2018/02/ten-ala-spectrum-scholars-awarded-grants-attend-pla-2018-conference</a>
PLA, Mary Davis Fournier	PLA Director-at-Large, Rural and Small Libraries	Subsidized PLA board seat from representative from rural and/or small library	2017-ongoing	Public library staff	Access to leadership opportunities	1 directly		1	The entire PLA membership, indirectly <a href="https://www.ala.org/pla/files/content/pdfs/2018_24%20PLA%202018%20Nominations.pdf">https://www.ala.org/pla/files/content/pdfs/2018_24%20PLA%202018%20Nominations.pdf</a>
PLA, Nellie Barnett	EDISJ Committee	We commit to dismantling white supremacy in libraries and librarianship. We recognize the urgency of this collective work, and commit to hold ourselves, our colleagues, and our institutions accountable when we fall short.	2017 - ongoing	PLA membership and staff	Expertise, review and development of content and strategy	TBD based on work of the committee			PLA membership and staff <a href="https://www.ala.org/pla/about/people/committees/pla-fedi">https://www.ala.org/pla/about/people/committees/pla-fedi</a>

PUBLIC PROGRAMS OFFICE									
PPO, Melanie Welch	STAR Net STEAM Equity Project: Enhancing Lear	The STAR Net STEAM Equity Project helps public library workers in small and rural communities offer outstanding, cultural	August 2020 - 2024	Teen/teen Latina girls, communities with large Latinx	Chosen libraries receive 3 travelling STEAM	12 libraries		12 libraries	<a href="https://www.ala.org/tools/programming/steam-equity/guidelines">https://www.ala.org/tools/programming/steam-equity/guidelines</a>
PPO, Melanie Welch	NASA@ My Library	NASA@ My Library is a STEAM education initiative created to increase and enhance STEAM learning opportunities for libr	September 2021-2021	Communities with above average populations of demogr	Libraries will enhance their capacity for del	60 libraries		60 libraries	<a href="https://www.ala.org/tools/programming/nasa-libraries">https://www.ala.org/tools/programming/nasa-libraries</a>
PPO, Melanie Welch	Community Connect: Digital Access at Home	The Community Connect: Digital Access at Home initiative seeks to increase internet access and financial literacy for rural	2021-2022	Public libraries in rural communities with low broadband	Libraries receive five Verizon Wi-Fi hotspot	20 libraries		20 libraries	<a href="https://www.ala.org/tools/programming/community-connect">https://www.ala.org/tools/programming/community-connect</a>

PUBLIC POLICY AND ADVOCACY									
PFA/Gavin Baker	Proposed federal legislation: Build America's Libraries Act	The Build America's Libraries Act would fund upgrades to the nation's library infrastructure to address challenges such as natural disasters, broadband capacity, environmental hazards, and accessibility barriers. This groundbreaking legislation would pave the way for new and improved library facilities in underserved communities across the country.	n/a	Funding prioritized to libraries serving marginalized communities, including tribal and low-income areas	A total of \$5 billion to be distributed by IMLS to state library agencies	TBD	n/a		<a href="https://www.ala.org/advocacy/buildlibraries">https://www.ala.org/advocacy/buildlibraries</a>
PFA/Megan Janicki	Libraries Build Business	The core objective of Libraries Build Business is to identify library-led entrepreneurship models that will best help low-income and/or underrepresented entrepreneurs to start and grow small businesses.	2020-2022	<i>Libraries Build Business is enabling 13 libraries across the country to increase the number of business creators they serve from low-income and underrepresented, backgrounds, with the goal of scaling best practices nationally.</i>	\$1.3 million distributed to 13 libraries to develop library entrepreneurship centers	TBD. The goal is to provide direct services to 15,000 people over the course of 18 months	7,000		<a href="https://www.ala.org/advocacy/workforce/grant">https://www.ala.org/advocacy/workforce/grant</a>
PFA/Marjike Visser	Federal relief (temporary): Emergency Connectivity Fund	The ECF is a federal program to provide \$7.17 billion for public and tribal libraries and K12 schools to purchase connected devices and broadband internet connections for use off of library and school grounds by library patrons, students, and teachers and staff who otherwise don't have internet access.	2021–TBD	Millions of library patrons, students, and teachers and staff who otherwise don't have internet access.	Public libraries can apply for \$7.17 billion to cover 100% of the cost of eligible equipment (e.g., Wi-Fi hotspots, laptops) and services (e.g., internet access) to be reimbursed to successful library and school applicants	TBD	n/a		<a href="https://www.ala.org/advocacy/ecf">https://www.ala.org/advocacy/ecf</a>
PFA/Marjike Visser	Federal program: E-rate	The federal E-rate program provides discounts to public libraries as well as K-12 schools on telecommunications services, internet access, Wi-Fi equipment, and some closely related costs like internal cabling.	Ongoing	E-rate supports programs that subsidize internet connections for 31 people with low incomes, 21 people who live in remote and rural areas, and 31 public libraries and K-12 schools.	Approved applicants receive a designated amount of the program's total spending, which is capped at \$3.9 billion annually. The subsidy for libraries ceases from 2026 to 2030.	xxx	xxx		<a href="https://www.ala.org/advocacy/erate">https://www.ala.org/advocacy/erate</a>
PFA/Kevin Maher	Federal program: Innovative Approaches to Literacy	The IAL program supports high-quality programs designed to develop and improve literacy skills for children and students from birth through 12th grade in high-need local educational agencies (high-need LEAs) and schools. The program promotes innovative literacy programs that support the development of literacy skills in low-income communities with programs to develop and enhance effective school library programs, which may include providing professional development for school librarians, books, and up-to-date materials to high-need schools.	Ongoing	Children and students (birth-12 <sup>th</sup> grade) and school libraries in high-need LEAs. Eligible schools are defined as those in which at least 20 percent of students are from families with income below the poverty line or reside on a tribal land.	Funds are directed to schools and support a range of activities. Grants can support purchase of books that children can bring home (many times the only books they may have at home), specialized literacy training for librarians, purchase of e-readers and electronic devices, literacy assessment for students, or supporting families with literacy development.	Under the current three-year grant cycle, 44 high-need school districts and non-profits received grants. New round of grants will be announced this Fall. Congress approved \$28 million for IAL in FY 2021. The House is recommending \$31 million for FY2022 (not yet final).		Since the creation of the IAL program in 2010, 193 high-need school districts and non-profits in 35 states and territories received grants for high-risk students. The program replaced the Improving Literacy	<a href="https://www.ala.org/advocacy/fund-libraries/ial">https://www.ala.org/advocacy/fund-libraries/ial</a>
PFA/Alan Inouye	Advocacy for access to eBooks/digital content	ALA advocates so that libraries can purchase and lend at pricing models that are reasonable and flexible. Access to and use of all published works—regardless of format—must equitably balance the rights and privileges of readers, authors, and publishers. ALA is currently supporting multiple state efforts to legislate fair eBook sales as well as contributing to a federal investigation into antitrust practices in the publishing community and lobbying at the federal level.	Ongoing	Library patrons who cannot afford to purchase digital content and all libraries, who pay exorbitant sums for such content, and who are not permitted to purchase certain content at all.	Patrons receive fee-free access to content in any format they choose, and libraries pay a reasonable price for any content available on the market	Residents of Md. + TBD	n/a		<a href="https://www.ala.org/advocacy/e-books">https://www.ala.org/advocacy/e-books</a>

PPA/Alan Inouye	Advocacy for updating Library of Congress subject headings	ALA urges the Library of Congress to change the pejorative subject heading "illegal aliens."	2016–present	Undocumented immigrants and cataloging librarians as well as the field overall	In addition to the benefits of respecting the humanity of undocumented persons by using the current term, the library field will benefit from standardization, as some libraries and consortia have implemented <a href="#">subject heading changes</a> .	n/a	n/a	<a href="https://www.ala.org/aboutala/sites/ala.org/aboutala/files/content/ALAN20CD%20ES%20RESOLUTION%20on%20Replacing%20the%20Library%20of%20Congress%20Subject%20Heading%20Issue%20Aliens%20Without%20Further%20Delay%20Final.pdf">https://www.ala.org/aboutala/sites/ala.org/aboutala/files/content/ALAN20CD%20ES%20RESOLUTION%20on%20Replacing%20the%20Library%20of%20Congress%20Subject%20Heading%20Issue%20Aliens%20Without%20Further%20Delay%20Final.pdf</a>
REFERENCE & USER SERVICES ASSOCIATION								
RUSA - Nirah Moore	Policies and Procedures: Letting them work for you and your patrons	This Webinar will identify the importance of creating policies and follow-through procedures to create boundaries, understand their patron-base, recognize their needs and how it fits into the library mission. In identifying policies that <a href="#">work best for your diverse patrons and identifying their diverse patron needs</a>	3-Nov-21	Library Staff and patrons				Website still being developed
RUSA - Nirah Moore	Decolonizing the Catalog: Anti-Racist Description Practices from Authority Records to Discovery Layers	During this webinar a panel of explored recent efforts to draw attention to and amend harmful language in library records related to the African-American experience in the United States	Offered in July 2021 and will be re-presented in Spring 2022	Library Staff and patrons				<a href="https://www.ala.org/usa/decolonizing-catalog-anti-racist-description-practices-authority-records-discovery-layers">https://www.ala.org/usa/decolonizing-catalog-anti-racist-description-practices-authority-records-discovery-layers</a>
RUSA - Bill Ladewski	EDIA Speakers series	This was the first in what the Volunteer Development Committee hopes is a continuing program that raises awareness for issues related to equity, diversity, inclusion, and accessibility and provides support for those working to create a more equitable experience in RUSA.	Feb/March/April 2021	RUSA volunteers	No monetary benefit. Expanded knowledge in EDIA issues and how those can be incorporated and supported in RUSA volunteering	Programs drew a total audience of approximately 70. Committee chair has expressed interest in continuing the series. Would expect similar audience figures in FY22	Approximately 70	<a href="https://www.ala.org/usa/members/edia-speaker-series">https://www.ala.org/usa/members/edia-speaker-series</a>
COMMITTEE ON THE STATUS OF WOMEN IN LIBRARIANSHIP								
Committee on the Status of Women in Librarianship (COSWL)	1. Harassment of Library Workers 2. Harassment of Library Workers Who are Part of Transgender Community	Series of webinars to address stated issues	Start: Nov 2021 – June 2022	Library staff, boards, etc.	Gain knowledge and skills	Unknown	NA	Not yet available
YOUNG ADULT LIBRARY SERVICES ASSOCIATION								
YALSA – Tammy Dillard-Steels	History of the four EDI Taskforce Analysis	YALSA Board is analyzing the history of the four EDI taskforce to identify action.	On-going	YALSA Membership.	These actions will lead to the culture shift needed to become a more inclusive association.		3800	Unknown <a href="https://www.ala.org/yalsa/sites/ala.org/yalsa/files/content/yalstsymposium/programs/history%20of%20four%20EDI%20Taskforce%20Revision%202.pdf">https://www.ala.org/yalsa/sites/ala.org/yalsa/files/content/yalstsymposium/programs/history%20of%20four%20EDI%20Taskforce%20Revision%202.pdf</a>
YALSA – Tammy Dillard-Steels	Evaluating Volunteer Resources Taskforce	This volunteer team will collaborate to evaluate and update volunteer resources for inclusion and diversity and form recommendations for continued areas for improvement.	July 1, 2021 – December 31, 2021	YALSA Membership.	These actions will lead to the culture shift needed to become a more inclusive association.		3800	Unknown <a href="http://yalsa.ala.org/files/2021/05/14/volunteer-opportunity-6-month-commitment/">http://yalsa.ala.org/files/2021/05/14/volunteer-opportunity-6-month-commitment/</a>
YALSA – Tammy Dillard-Steels	New Mission statement and strategic plan Implementation	Equity, diversity and inclusion principles are fundamental to the values of the association and must be infused throughout the strategic work identified in this plan.	FY'22 – FY'25	YALSA Membership.	These actions will lead to the culture shift needed to become a more inclusive association.		3800	unknown <a href="https://www.ala.org/yalsa/workingwithyalsa/http://evaluating%20volunteer%20resources">https://www.ala.org/yalsa/workingwithyalsa/http://evaluating%20volunteer%20resources</a> New Mission Statement - Through networking, advocacy, and professional development, the Young Adult Library Services Association empowers all those involved in the profession to provide equitable, diverse and inclusive teen services.