

ALA American Library Association

ALA Executive Director's Report to ALA Executive Board
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June 17, 2022

ASSOCIATION OPERATIONS UPDATES AND HIGHLIGHTS

ALA Asks the Nation to Unite Against Book Bans

As almost every unit or division reports this quarter, the unprecedented escalation in book censorship, mostly targeting school and public libraries, but most recently finding its way to bookstores, is one of the presiding concerns of ALA members, staff, and the LIS sector in general. At this point efforts to remove books and materials, especially those that written by or depicting BIPOC and/or LGBTQIA+ individuals has far eclipsed, the intensive censorship efforts of the "McCarthy era." Taking its name from Senator Joseph McCarthy who in the late 1940s through early 1950s, led the targeting and investigation of public figures, authors, and books that, at first, contained ideas that were sympathetic to communist ideology, eventually narrowed his lens on books – as well as librarians – that supported racial integration and civil rights activism. During McCarthy's period of influence the Senate Government Committee on Operations would identify and ban thousands of books including Henry David Thoreau's *Civil Disobedience*, and *Robin Hood* (for its attack on wealth hoarding); authors such as W.E.B Dubois and Langston Hughes would be tried for "Un-American" sentiments; and librarians like Ruth W. Brown of Bartlesville, Oklahoma Public Library (and later the library's entire board) would be let go due to efforts to preserve public access to periodicals that had been labeled "subversive" and to desegregate library and other municipal services. Rather than be silent during this period, the American Library Association would presciently and defiantly hold its First Conference on Intellectual Freedom in New York City in 1952, where in contesting the notion that book selection should be taken away from professionally trained librarians in the name of censorship observed, "You don't object to the doctor impressing his point of view upon you when he tells you that you are dangerously ill. You don't talk about his 'point of view.' Librarians should be expert or else they are not a profession."

It is fitting then, seven decades later, that the American Library Association is the first organization to launch a nationwide campaign, Unite Against Book Bans (www.uniteagainbookbans.org), which premiered during National Library Week in April. The campaign which is informed by a mass public poll commissioned by ALA which found that Democrats and Republicans disapprove (more than 70% of both groups) of book censorship efforts, has a two-pronged focus -- to preserve the right to read as a centerpiece of intellectual freedom and to underscore the veracity of trained library professionals as stewards of that right by the charge of our profession.

- ALA units and divisions continue to rise to this charge. For instance, United for Libraries' Intellectual Freedom Task Force released two new resource guides related to intellectual freedom this spring: "Challenges to Materials and Programs: The Role of Library Trustees & Board Members" (March 31, 22) and "Challenges to Materials and Programs: The Role of the Friends of the Library" (April 12, 22). AASL reports that through many teachers are leaving education amidst the great resignation, school librarians have been under intensive attack with increased book banning to state regulations that propose criminalization for their role in having 'porn' in the school library. AASL has focused on providing a supportive community.

As of this writing, nearly three-dozen national organizations have signed on to support the UABB campaign including the American Booksellers Association, American Federation of Teachers, Association for Library and

Information Science Education, Authors Guild, Digital Public Library of America, Human Rights Campaign, National Book Foundation, National Coalition Against Censorship, and the Society of American Archivists. As Deborah Caldwell-Stone, director of the ALA's Office for Intellectual Freedom adroitly summarizes, "This is a dangerous time for readers and the public servants who provide access to reading materials. Readers, particularly students, are losing access to critical information, and librarians and teachers are under attack for doing their jobs...ALA is taking the steps necessary to protect individuals' access to information, but we can't do this alone." This is a moment as critical as any ALA or its membership has faced. May time find us on the right side of history.

Pivot Strategy Status Report

The Pivot Strategy continues to provide a crucial operational roadmap for evolving and expanding the association's core businesses. As this report indicates, it has been adopted by every ALA unit and has in its first full fiscal year of launch, proved fruitful. While Conference Services, Membership, and Publishing -- ALA's traditional business areas, navigate downturns exacerbated by the pandemic, the new impact streams articulated by the Pivot Strategy: Continuing Education, Contributed Revenue, and Data, Design, and Research have demonstrated the potential to attract new members, customers, and partners.

ALA has not held an in-person conference since 2019. The annual conference in June 2022 with its theme of "Together Again" sees ALA and **Conference Services** seeking to continue its successful track record of digital convening while also addressing the demands of the field who have made the Annual Conference, by far, the largest gathering of library and information science professionals in the world. Based on ongoing benchmarking efforts to track in-person conference attendance trends in the pandemic era, ALA projected and budgeted for 50% of 2019's paid annual conference registration (from 14,000 to 7,000 individuals) and those projections have borne out as ALA reached its projected numbers nearly two weeks before the start of its convening. In total it is expected that there will be between 13,000 to 14,000 conference attendees when exhibitors and other stakeholders are added to the registration numbers. While these registration rates, in a moment when some are still cautious about travel, are hard won, this period has yielded many lessons about how ALA can reach new audiences and customers that we will reference as we manage ALA's role as the single largest convener for the LIS sector.

Membership is another established impact area that has been deeply affected by the pandemic. Whether self-funded or institutionally underwritten, a number of existing and prospective members experienced shifts in either income or employment. Though membership declined -- though not to the degree of severity expected -- over the first two years of the pandemic, the pivot strategy's central focus on and investment in membership we are beginning to see some recovery as we begin to see an uptick (about 1,000 new or returning members) in our numbers. The Member Relations & Service unit has worked on a number of recruitment initiatives that have supported this trend including the following current initiatives:

- A joint membership recruitment campaign with the District of Columbia Library Association. While this is a localized campaign, we believe this is laying the ground for future chapter collaborations around ALA conference locations;
- Connected membership to discounted Continuing Education learning opportunities; and
- Reached out to unaffiliated student members to connect them to a division or roundtable.

As a new standalone impact stream, **Continuing Education**, has required considerable start up investment. Yet, at the end of the third quarter, sales are at approximately \$465,000. ALA is currently at roughly 60% of our revenue target for this quarter. In partnership with the Music Library Association, ALA launched the Music Cataloging Course Bundle. And last month, launched the new *Human Resources Crash Course* workshop, which drew over 100

registrants for its debut session. Since its launch last fall, over 10,000 customers (6,733 of these individuals are not ALA members – indicating the expanded reach that CE is bringing) have created accounts on the new site.

To build towards ALA's goal of expanding its **Contributed Revenue** (that is grants and donations that underwrite mission-centered activity rather than programmatic grants of which ALA usually disseminates over \$8M to libraries), the Development Office continues to identify, cultivate, and steward corporate, foundation and individual funders, process gifts, and support other ALA Units.

- Currently, Contributed Income generated or managed by Development stands at \$2,669,600 of the Pivot Strategy goal of \$3,085,000, or approximately 85%. This figure does not reflect planned gifts obtained during FY22, including approximately \$450k reported through the FreeWill platform, which allows members of the public to name ALA as a beneficiary of their estate.
- In addition, the Library Champions program is currently at its highest level in 3 years, with the addition of three new members since the beginning of FY22 and a 10% increase in support by OverDrive, lead Library Champion.
- As part of its aspiration to expand its grantmaking capacity in support of libraries nationwide that do not have the staffing or funding to pursue professional grantmaking, ALA also gains mission-supporting contributions from major projects such as the \$10 million grant PPO received earlier this year to support a new grantmaking initiative, [Libraries Transforming Communities: Accessible Small and Rural Communities](#). 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.

These projects also contribute to the growth of ALA membership through underwriting individual ALA and one division memberships for 600 small and rural librarians. The overhead from that grant will support ALA's diversity, Equity, and accessibility efforts.

Publishing continues to find ways to respond to observed need in the LIS field through its magazines and through partnerships on publications such as "[A Trauma-Informed Framework for Supporting Patrons: The PLA Workbook of Best Practices](#)," published by ALA Editions in collaboration with the Public Library Association (PLA) which was recently released. Presented by the PLA Social Worker Task Force, the book provides a collection of powerful tools for library workers. The book is described as being "filled with prompts, exercises, and best practices that shed light on how trauma can affect people, helping build confidence and ability to support library patrons".

In building its **Data, Design, and Research** team which will be part of the larger Center for the Future of Libraries unit, ALA has welcomed two new grant funded fellows:

- Dr. Ken Bigger most recently served as Executive Director of the Chicago Literacy Alliance (CLA), guiding the launches of the CLA's Equity Through Literacy Framework and Literacy Equity Initiative. He joins ALA as Senior Fellow in the Center for the Future of Libraries, to continue advancing programming and critical conversation about literacy, equity, opportunity, and the vital roles libraries play. Dr. Bigger's appointment is partially underwritten by the Barbara Bush Foundation for Adult Literacy.
- Dr. John Agada is a Professor Emeritus of Emporia State University in Kansas. He has an M.Ed. in Curriculum and Instruction (Ahmadu Bello University, 1981) and a Ph.D. in LIS (University of Pittsburgh, 1984). Dr. Agada has taught at universities in Nigeria, Emporia State University, University of Wisconsin-Milwaukee, and Chicago State University. His studies of inner-city communities, "at-risk" students, and library users have been pioneering for the LIS field. He joins ALA as Senior Fellow in the

Center for the Future of Libraries to forward his research on implications of the pandemic for the future of library and information services and as inaugural researcher in the newly formed Institute for the Study of Race in Libraries and Information technologies.

Equity, Diversity, Inclusion and Social Justice Inventory and Planning

Earlier this year, Council approved ALA's **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:

- a. Embeddedness of EDI into the Culture and Climate of the Organization: Integration of equity, diversity, and inclusion into the organization which ensures that EDI is a priority;
- b. 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;
- c. 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;
- d. 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
- e. Data Practices: Plans and procedures for acquiring or collecting, analyzing, disseminating, and applying data to monitor and achieve organizational DEI goals and objectives.

The implementation of this framework across ALA administrative and operational systems by the third quarter of this year will yield the following intended outputs and outcomes:

- Among the tactics that will evidence the embeddedness of "equity, diversity, and inclusion into the organization" will be working with the Office of Accreditation, the Committee on Accreditation, and Executive Board leadership to introduce EDI as one of the metrics in the accreditation review process by the end of FY23.
- ALA will also adopt a maximum three-year cycle for comprehensive EDI training and education for all staff. These training and professional development opportunities will reflect on the range of diversity including race, ethnicity, gender, sexual orientation, disability status, age, religious belief, class, as well as issues and contexts that explore the intersectionality of personal and group identity. This three-year comprehensive staff training and education cycle will begin in FY 2022 with the Disability Inclusion Institute trainings which aim to increase knowledge on disability rights and etiquette, as well as best practices for enhancing the accessibility of our digital and event offerings. All ALA staff will be required to take this training.
- In alignment with its commitment to "identifying and implementing strategies that will strengthen equitable and inclusive hiring practices" ALA will i) work to increase the inclusion of BIPOC and/or individuals with disabilities in the candidate pool for posted ALA positions; and ii) by the end of FY2023, launch a one-year residency program to serve as a career accelerator and ALA workforce pipeline for early to mid-career LIS and association professionals interested in LIS and/or association management.

- As part of ALA's quest to expand its internal [data practices](#) and to serve as a data clearinghouse for the field, ALA will launch the Institute for the Study of Race in Libraries and Information Technologies as part of the Center for the Future of Libraries in FY22. The work of the R-LIT will be carried out by a designated Center scholar. With funding from the Mellon Foundation, [Dr. John Agada](#), as mentioned above, is inaugurating this position.

In reflection of the association's commitment to celebrating diversity, the Rainbow Round Table (RRT) released their Top Ten Children's and Young List and their Adult Fiction and Non-Fiction Top Ten list. RRT's multiple standing committees continues to work on different projects through archiving, updating digital resources and websites, and working on programming for ALA Annual. They will celebrate book and non-book awards at ALA Annual on Monday, June 27th from 4pm – 6pm.

Public Policy and Advocacy

After a truly generative tenure at ALA, Kathi Kromer, AED for Public Policy and Advocacy left AL on June 10. Alan Inouye, Senior Director of Public Policy and Government Relations will step into the Associative Executive Director role on an interim basis. Kathi came to the American Library Association five years ago to be the Associate Executive Director of the Washington Office. She envisioned and led the transformation of the Public Policy and Advocacy office through the merger of the former Office for Information Technology Policy with the former Office of Government Relations and former Office of Library Advocacy, bringing greater cohesion to our policy and advocacy work at every level. She created a strategic plan for the office and strengthened and grew our grassroots network. Last year, I added the Chapter Relations and International Relations offices to her portfolio. Under Kathi's leadership, the PPA team has worked closely with members to advance ALA's mission and to drive the increase of IMLS funding by over \$37 million; to secure, via the American Rescue Plan Act (ARPA), \$200 million for IMLS for digital inclusion and COVID-19 recovery, with a \$2 million minimum distributed to each state—the largest single investment in the agency's 25- year history; launch the #eBooksForAll campaign; develop the Appropriations Fly-In and streamlined National Library Legislative Day, ALA's signature grassroots policy event and securing support for libraries in the CARES Act which yielded \$50 million for national grants and funding to state libraries, distributed through the Institute of Museum and Library Services (IMLS), for COVID-19 response and digital inclusion

We appreciate all the Kathi has done for ALA and the impact of her team's success will be felt for years to come in the library field. While the search for a new AED gets underway, Dr. Alan Inouye, who was Kathi's deputy, will step into the interim role on June 10. Alan is the Senior Director of Public Policy and Government Relations and has been engaged in the public policy work of the American Library Association for the past 15 years. Alan leads ALA's efforts on eBooks and the digital divide. He also developed the partnership with Google which resulted in the Libraries Ready to Code and Libraries Build Business programs. Previously, he was the coordinator of the President's Council of Advisors of Science and Technology in the Executive Office of the President and a study director at the National Academy of Sciences. Alan completed his Ph.D. in library and information studies at the University of California at Berkeley. Early in his career, he was an engineer and manager in Silicon Valley.

During this transition, Public Policy and Advocacy (PPA) continues its efforts to gain support for key legislation related to libraries. Among the items on which PPA is providing updates include:

- ALA endorsed the Housing for All Act (S.3788/H.R.6989) introduced by Sen. Alex Padilla (D-CA) and Rep. Ted Lieu (D-CA). The bill would authorize \$10 million per year for 10 years for the Substance Abuse and Mental Health Services Administration to fund libraries to carry out pilot programs to address the needs of individuals experiencing homelessness or individuals at risk of homelessness. Sen. Padilla included a quote from ALA President Patty Wong in his [press release announcing the legislation](#).

- On March 29, in response to the White House’s fiscal year 2023 budget request, [ALA welcomed the administration’s proposal to create a new Office of School Infrastructure and Sustainability](#) within the Education Department, to facilitate funding and resources for improving school facilities, which include school libraries. On May 18, the [Re]Build America’s School Infrastructure Coalition, of which ALA is a member, [applauded the House Education and Labor Committee’s approval of the Rebuild America’s School’s Act \(H.R. 604\)](#), which would authorize new funding to modernize school campuses, including school libraries.

Policy issues of note include:

- Library Funding: The \$1.5 trillion [Fiscal Year \(FY\) 2022 funding package](#) signed by President Biden brought the annual appropriations cycle (on pause since October 1) to a disappointing close. A final budget agreement between the administration and House and Senate leadership resulted in funding for many library programs (and most domestic programs) significantly below levels originally proposed by Congress (see ALA’s FY 2022 federal funding for libraries [chart](#)).
- E-books: Eight states have active legislation or definitive efforts to improve digital book access for libraries. Most prominent is Maryland, having enacted legislation and a law that is preliminarily enjoined by the U.S. District Court for the District of Maryland. Federal Judge Deborah L. Boardman approved the motion for a [preliminary injunction](#) on Maryland’s law on February 16. Hence, the Maryland law is now suspended, pending further action by the court. The other currently engaged states are Connecticut, Illinois, [Massachusetts](#), [Missouri](#), New York, Rhode Island, and [Tennessee](#). In terms of awareness, education, and the visibility and reputation, the various state actions have been quite favorable for libraries. PPA is developing recommendations and guidance to aid state efforts, especially looking ahead to the 2023 legislative sessions.
- Digital equity: PPA has worked with coalition partners to ensure libraries are at the decision-making table when it comes to policymakers’ continued efforts to bridge the digital divide:
 - PPA issued a white paper, “[Keeping Communities Connected: Library Broadband Service During the COVID-19 Pandemic](#),” focusing on how libraries provided internet and technology access to those who would otherwise lacked it. The report useful as a resource for the community practitioner to provide ideas for improving library services and for advocates to showcase how libraries leveraged federal funds to bolster internet access during a pandemic—whether to advocate for further funding or to explain the effective use of federal funds by libraries.

Programmatic Innovation

During this period of disruption, ALA continues to innovate programmatically. The following are examples of new and expanded programs created to respond to current LIS sector need:

- PLA recently announced the availability of new and updated digital literacy courses and training materials developed as part of PLA’s [collaboration with AT&T](#) to bring digital literacy training to families. In addition, PLA launched the [Digital Literacy Workshop Incentive Program, supported by AT&T](#), which will provide resources and funding opportunities (of up to \$7,000 per library) for public libraries to use the new materials to lead local digital literacy workshops. The curated collection of courses—available in English and Spanish—help newly connected families to build skills and confidence using technology and are now freely available on PLA’s digital literacy training site, [DigitalLearn.org](#). “[A Trauma-Informed Framework for Supporting Patrons: The PLA Workbook of Best Practices](#),” published by ALA Editions in collaboration with the Public Library Association (PLA), was just released. Presented by the PLA Social Worker Task Force, the book provides a collection of powerful tools for library workers.
- ODLOS is engaged in several key literacy initiatives in coordination with the ALA Committee on Literacy and Literacy Assembly. The newest of these is a webinar series on digital equity through literacy. With

digital equity a central focus of Patty Wong's presidency and of the ALA, and on the heels of the recent American Libraries Special Report: *Toward an Equitable Digital Future*, ODLIS saw the opportunity to elucidate the interconnectedness of digital equity and literacy. The first webinar, Digital Equity through Literacy: Framing the Conversation, was held on May 31st and included panelists John Agada (Senior Fellow, ALA Center for the Future of Libraries); Cassandra Barnett (Program Advisor for School Libraries, Arkansas Department of Education's Division of Elementary and Secondary Education); Ken Bigger (Senior Fellow, ALA Center for the Future of Libraries); and Mimi Lee (Director of Literacy and Learning, New Jersey State Library). The speakers provided definitions and framing around digital equity and literacy and offered perspectives on digital equity through literacy in public and school libraries.

- ACRL's recent "[Top trends in academic libraries](#)" report, authored by the 2021–22 ACRL Research Planning and Review Committee and published in the June 2022 issue of *C&RL News*, summarizes trending topics in academic librarianship from the past two years. The report notes that "The impact of the COVID-19 pandemic on academic library services has been significant, and these changes, in many cases, are ongoing" and that "libraries face a fundamental shift that will extend far into the future and beyond the pandemic." Pandemic-related "closures and the institutional changes that enabled them had a significant and diverse impact on librarianship, including rethinking long-held paradigms, increased professional stress around institutional budgets, and the ability to work remotely." Additionally, ACRL is offering the second installment of its Fostering Change Cohort, a 12-week program designed for teams from institutions planning any type of organizational change, this June through August. The cohort program hopes to build a community of change agents in academic libraries, armed with the tools to spark, lead, and sustain change with a network of peers to lean on as they embark on a variety of streams of change.

Conclusion

The activities summarized here are just a brief summation of the far more detailed report. That report itself, is again only illustrative of the dynamic work being carried out by the hundreds of staff and thousands of members who dedicate themselves to the preservation of our nation's libraries and the agency of the communities they serve to use them actively and freely. To continue this work, we must prioritize the growth of our membership and customer base and the financial and operational efficiency of this association, which at times of greatest threat to human agency, has shown itself to be one of this country's most formidable stewards of information equity and access.

REPORTS OF ALA UNITS

Page	Unit
9	American Association of School Librarians
14	Association of College and Research Libraries
17	Association For Library Service to Children
21	Chapter Relations Office
22	Choice
24	Communications And Marketing Office
26	Conference Services
28	Continuing Education
30	Core
32	Development
38	Finance
40	Governance Office
42	Information Technology
45	International Relations Office
47	Member Relations & Services
55	Office for Accreditation
56	Office for Diversity, Literacy And Outreach Services
62	Office of Human Resource Development and Recruitment
63	Office for Intellectual Freedom
67	Public Library Association
71	Public Policy and Advocacy
74	Public Programs Office
77	Publishing
82	Reference And User Services Association
85	United for Libraries
89	Young Adult Library Services Association

AMERICAN ASSOCIATION OF SCHOOL LIBRARIANS (AASL)

Unit Manager: Sylvia Knight Norton

Unit Budget:

- Budgeted revenue and expense YTD through January 2022: Revenue - \$1,179,587; Expense -\$1,005,923
- Actual revenue and expense YTD through January: Revenue - \$896,956; Expense - \$967,143 (includes Overhead budgeted \$261,496; actual \$189,231)

of Staff: 5 (including Executive Director, one vacancy being filled as an expanded professional development/CE role)

Revenue Stream(s) the Unit Supports:

- ☒ Conference Services - support programming and staffing
- ☒ Continuing Education – provide eLearning content
- ☒ Contributed Revenue - in addition to funds for division, agreements provide admin fees to ALA and relationships that are built upon AASL work and can lead to significant donations to ALA (i.e., Pokémon)
- ☒ Membership – approximately 65% of AASL members belong to only AASL in addition to the basic ALA membership requirement
- ☒ Publishing – strong program of publishing in conjunction with ALA Editions for AASL Standards and related ancillary works

Status Report on Pivot Strategy, Aligned Unit Goals:

AASL aligns with the ALA pivot strategy with goals to **increase membership** and **increase revenue**.

Membership is down. The January 2021 membership of 5,750 after the National Conference registration had opened is now 5,386 or -6.13% less in January 2022. The largest loss (-27.12%) is in student membership after a program with ALA to provide complimentary ALA/AASL student memberships ceased and was changed to only complimentary AASL membership when purchasing the *AASL National School Library Standards* that is published in conjunction with ALA editions with an agreement for shared revenue. AASL has also found several members whose membership lapsed in 2020 despite having been highly involved in AASL leadership before that time. Most indicated that they were not aware their membership had lapsed and did rejoin after being contacted by AASL.

Revenue during a conference year is highly dependent on the division biennial conference. The 2021 AASL National Conference held in Salt Lake City in October was successful in many ways and the enthusiastic response from the profession will enable us to build towards a substantially larger conference in Tampa in the fall of 2023, but the 2021 conference has not met budget (with performance reports through January still incomplete for expenses and revenue and/or in need of reconciling). During a pandemic environment there was an increase in registrations as vaccinations were approved but new variants in late summer led to cancellations while the expenses for basics such as contracts for facility and audiovisual remain the same. The exhibit revenue that is the foundation of any conference was less than budgeted due to vendor concerns about their fiscal year as well any safety considerations for their staff.). School librarians do continue to talk about the benefits of having met in-person with their peers. Exhibitors who were there said they were 'grateful' that it was a live event and promised to be in Tampa.

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

The 2021-2022 school year is closing, but it has been a difficult school year for school librarians. They returned to in-person and/or hybrid learning in what was hoped to be a post-pandemic world but there are increased demands to educators in general. School librarians had knowledge key to the technology needs of remote learning and curating online resources and information in any packaging and they continue that as schools re-opened. As all educators tried to deal with the learning gaps and social emotional needs of those students who were isolated the last few years, many are leaving education amidst the great resignation. School librarians have also been under attack with increased book banning to state regulations that propose criminalization for their role in having 'porn' in the school library.

AASL has focused on providing a supportive community for its members who have testified before their state legislators about collection development while cellphones filmed them with ongoing commentary about the "perverted" school librarian. Many are facing weeks of challenges to a book only to find the next one on a list to be brought up by an organized group means another committee and challenge process. Others have sat in school board meetings where they have been called names. A member testifying before her state legislative committee on criminal justice calmly talked about collection development and process to consider a challenge and then told her practice was "shameful." Yet, one-by-one our AASL members have assured parents that they have a right to decide about their own child's reading activity while defending censorship.

The book banning environment has brought increased visibility for school librarians, a position that is too easily overlooked in some districts or by the public. The AASL president, Jennisen Lucas, has been in constant demand for interviews by journalists for print, streaming, or television and these provide an opportunity to highlight the essential role of the school librarian for teaching and learning. She pointed to the difference between a parent's concern about what their own child is reading and censoring a book for all children. There is also a difference between schools without a school librarian and those who have one. This has been promoted when speaking to the current climate of book challenges and answering questions that all too often show the public does not know what happens in their school library. Although AASL does not have an accurate number for school librarian staffing across the country, we have worked with members to learn that there are school districts that added school librarian positions this year and several districts that proposed cuts did make final decisions to keep the positions.

Censorship and state legislation will continue to be issues for school librarians and AASL will continue to work with PPA and OIF to address these issues as well as promote AASL resources that show the value of a school librarian.

of Members: 5207 as of January 2022

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

Regularly scheduled Mailing	Sent To	Opened	Clicks
AASL Digest – March 2022	4,126	1,794	123
AASL Digest - April 2022	4,177	1,681	139
AASL Digest - May 2022	4,158	1,196	125
AASL Friday Forecast March 4, 2022	3,649	1,522	33

AASL Friday Forecast March 11, 2022	3,623	1,562	57
AASL Friday Forecast March 18, 2022	3,687	1,579	44
AASL Friday Forecast March 25, 2022	3,652	1,548	59
AASL Friday Forecast April 1, 2022	3,634	1,404	52
AASL Friday Forecast April 8, 2022	3,723	1,576	59
AASL Friday Forecast April 15, 2022	3,731	1,618	38
AASL Friday Forecast April 22, 2022	3,747	1,465	56
AASL Friday Forecast April 29, 2022	3,762	1,601	37
AASL Friday Forecast May 6, 2022	3,672	1,515	21
AASL Friday Forecast May 13, 2022	3,695	1,622	31
AASL Friday Forecast May 20, 2022	3,715	1,569	41
AASL Friday Forecast May 27, 2022	3,725	1,573	47

Other topic specific emails	Sent To	Opened	Clicks
ISS Tour Invite to AC22 Attendees	177	102	12
AASL @ ALA Annual	3,295	1,293	33
Student Standards Process to ESLS Members	1,079	506	15
AASL Librarygram fundraiser for scholarship	10,3045	3,474	134
AASL Election Closes Tomorrow	3,449	1,300	33
AASL Election – One Week Left	3,459	1,260	35
Free Resources to Celebrate SLM	3,463	1,717	335
AASL Election – Two Weeks Left	3,444	1,276	40
AASL Election – Polls Open	3,417	1,488	78

Twitter, Facebook, Instagram, LinkedIn, and Pinterest

Impressions: 1,085,387

(Number of times content was displayed to users)

Engagements: 38,364

(Number of times users engaged with posts)

Post Link Clicks: 8,880

(Number of times users clicked on links from posts)

Total Audience Across Platforms	58,176
Total Net Audience Growth	1,589
Twitter Net Follower Growth	500
Facebook Net Page Likes	182
Instagram Net Follower Growth	362
LinkedIn Net Follower Growth	283
Pinterest Net Follower Growth	0
YouTube Net Follower Growth	56
Snapchat Net Follower Growth	-
TikTok Net Follower Growth	6

Members/non-members/other stakeholder engagement:

Regularly scheduled newsletters (AASL digest, AASL Friday Forecast, show open rates that reflect member interest in the activities and news of AASL

Continuing education resources show 614 active uses this quarter (207 nonmembers, 287 members, 285 new logins) and sales of \$1,297.11.

The weekly School Library Smartbrief reaches 5-6,000 per month and provides advertising revenue.

The monthly AASL Town Hall continues with an average of 80 participants per month.

New webinars

- Copyright & Creativity (ISS) – 112 registrants
- Celebrate School Library Month – 393 registrants
- Summer Reading Implementation (ISS) – 128 registrants
- Summer Reading Book Recommendations (ISS) – 131 registrants
- Databases are Next (ISS) – 127 registrants

Describe the Most Impactful Unit Activities this Quarter:

AASL leaders exhibited at the ASCD Conference held in Chicago in April. ASCD is a significant organization for curriculum and supervisor educators. Made possible by a generous AASL member, Marina 'Marney' Welmers, attending the ASCD conference provided an opportunity to connect to attendees who collaborate with school librarians. As part of its continued commitment to provide school library professionals the materials and resources needed to implement its *National School Library Standards*, the American Association of School Librarians (AASL) released a crosswalk aligning the AASL Standards to ASCD Whole Child Tenets. The crosswalk and accompanying statement of alignment are downloadable, and the printable PDFs are available on the [AASL Standards Portal](#). The crosswalk between the AASL Standards and ASCD's Whole Child Tenets shows the strength of school libraries in providing space and resources for learners to be their authentic 'whole' selves to nurture learners have strengths beyond core subjects.

AASL has a robust awards program that benefits the school librarian and school library recipients. The February 1st application deadline means this quarter has increased committee work dedicated to the selection of award winners. Press releases for each award were distributed to local newspapers. Awards range from the recognition of [researchers](#) for school libraries to the five school libraries that received [Inspire Collection Development](#) grants to AASL's annual recognition of [the Best Digital Tools for Teaching and Learning](#). AASL is grateful to sponsors who continue to make these awards and recognition possible.

AASL continues partnerships with school administrators as essential decision makers for the staffing school libraries and enabling the role of a school librarian in their school. In a series of videos produced by AASL, district superintendents and school principals were interviewed to reflect on how school librarians move learners' journey beyond school walls, engage diverse global learning communities, and shape responsible, mindful, and collaborative learning cultures. *Administrators on Engaging through School Libraries* can be found at <https://youtu.be/iERqgl8ajhk>

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

AASL recently selected new administrators for a second cohort for the *AASL School Leader Collaborative*, an initiative sponsored by OverDrive Education to champion the school librarian's integral role in teaching and learning. Each of the selected administrators were nominated by their school librarian. The administrators will participate as speakers at the 2023 AASL National Conference. The school librarians will receive complimentary registration to the 2023 AASL National Conference in Tampa and a \$500 stipend for conference attendance where they may present a concurrent session with their administrator. The AASL School Leader Collaborative members will meet monthly with AASL leaders and are asked to publish articles and work with AASL leaders to connect with their administrative national organizations. The goal is to deepen the visibility and understanding for leadership of an effective school library where the school librarian provides an inclusive and personalized learning environment, creates equitable access to diverse resources, and transforms teaching and learning for all learners.

ASSOCIATION OF COLLEGE AND RESEARCH LIBRARIES

Unit Manager: Jay Malone

Unit Budget:

- Budgeted revenue and expense – FY22 Budget: Revenue \$2,211,555 | Expenses \$2,948,895 | Net (\$737,340)
- Actual revenue and expense – Q1 Performance Reports: Revenue \$466,559 (11% ahead of budget) | Expenses \$376,739 (41% better than budget)

of Staff: 13

Revenue Stream(s) the Unit Supports:

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

Status Report on Pivot Strategy, Aligned Unit Goals:

Work continued in Q3 on the division's pivot strategy goals of rebuilding individual membership to the April 2020 level of 9,500 members and increasing organizational membership from the April 2020 level of 605 to 700 by the end of FY22. Staff continued using webcasts and other event registration/sign-up email lists in newsletter and marketing distribution this quarter, including non-member attendees. Sending email messages about ACRL activities helps keep non-members engaged in the association and will, it is hoped, drive future membership. Staff completed a project this quarter to update the division's member outreach program, including welcome and renewal reminder letters. Work on updating onboarding messages for new members will continue in Q4. 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 January 2022 official count, individual ACRL membership stands at 8,004, organizational membership stands at 509, and corporate membership stands at 18, for a total membership of 8,531.

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

The most recent "[Top trends in academic libraries](#)" report, authored by the 2021–22 ACRL Research Planning and Review Committee and published in the June 2022 issue of *C&RL News*, summarizes trending topics in academic librarianship from the past two years. The report notes that "The impact of the COVID-19 pandemic on academic library services has been significant, and these changes, in many cases, are ongoing" and that "libraries face a fundamental shift that will extend far into the future and beyond the pandemic." Pandemic-related "closures and the institutional changes that enabled them had a significant and diverse impact on librarianship, including rethinking long-held paradigms, increased professional stress around institutional budgets, and the ability to work remotely."

ACRL continues to focus effort on helping academic and research libraries and librarians navigate change. Through its strategic goal on the Value of Academic Libraries (VAL), which recognizes the need for academic libraries to

demonstrate alignment with and impact on institutional outcomes, ACRL seeks to expand professional development opportunities for assessment and advocacy of the contributions of academic libraries to their communities. ACRL's VAL Committee is holding a series of free webcasts focusing on ways academic libraries can better align with the mission, vision, and values of their institutions; improve student learning and equity; and communicate more effectively with campus stakeholders. Two webcasts were held this quarter with the final installment of the series coming over the summer.

Additionally, ACRL is offering the second installment of its Fostering Change Cohort, a 12-week program designed for teams from institutions planning any type of organizational change, this June through August. The cohort program hopes to build a community of change agents in academic libraries, armed with the tools to spark, lead, and sustain change with a network of peers to lean on as they embark on a variety of streams of change.

The report also focuses attention on the inequities in profession surfaced by the pandemic. During these unprecedented times, heightened social awareness of systemic racism, oppression, and institutional violence, and economic recession all disproportionately impact communities of color. Recognizing these ongoing challenges, the ACRL Board of Directors has approved funding for one year of ALA and ACRL membership for up to 25 library workers who identify as Black, Indigenous, and People of Color (BIPOC). This membership amounts to an annual savings ranging from \$123 to \$219 per membership for the recipient. Awardees were notified by June 1, 2022, and the free memberships will begin on July 1, 2022.

ACRL staff continue to monitor the higher education and academic library landscape and adapt/develop new programs and services to help the academic library community in addressing a variety of issues. Work is also ongoing on several additional projects, including reevaluating the ACRL awards program through the dual lens of sustainability and equity and membership recruitment and retention initiatives.

of Members: 8,531 (January 2022 official count)

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

- Paid online learning attendance: 264 individuals
- Newsletter total opens: 163,581
- Print and ebooks sold/distributed: 2,222
- Journal website total views (*C&RL*, *C&RL News*, *RBM*): 672,206
- ACRL website total visits: 185,417
- Facebook: 110,998 impressions; 7,754 engagements
- Instagram: 16,811 impressions; 637 engagements
- Twitter: 95,513 impressions; 2,705 engagements
- YouTube: 11,811 views; 1,935 hours of watch time

Members/non-members/other stakeholder engagement:

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

- ACRL's Online Learning program offered two live webcasts, one three-part webcast series, and two online courses during this report period. 264 individuals participated in e-learning focusing on ethnic studies in academic and research libraries, change management, critical information literacy instruction, and universal design. Upcoming topics include instructional design, active learning techniques, and online digital literacy. ACRL is also partnering with Core to offer an online learning webinar on cognitive load and instructional design in June.

- Six new ACRL books were published during Q3 of FY22 and were promoted for purchase to members and other stakeholders. 1,442 print and individual-use ebooks were sold, along with about 780 institutional ebook copies via distributors.
- Facebook impressions were up 99% and engagements were up 298% from Q2. Instagram impressions were up 77% and engagements were up 4% from Q2. YouTube views were up 24% and hours of watch time up 29% from Q2. Meanwhile, Twitter impressions were down 9.6% for the quarter while engagements remained steady. Total newsletter opens were up 22% from Q2.

Describe the Most Impactful Unit Activities this Quarter:

2022 ACRL Election Results

Beth McNeil, Dean of Libraries and School of Information Studies and Esther Ellis Norton Professor of Library Science at Purdue University, have been elected ACRL Vice-President/President-Elect. McNeil will become president-elect in July 2022 and assume the presidency in July 2023 for a one-year term.

Walter Butler, Librarian/Library Chair at Pasadena City College, and Rebecca Miller Waltz, Interim Associate Dean for Learning and Undergraduate Services at Pennsylvania State University, were elected to the ACRL Board of Directors as Director-at-Large.

Kara Whatley, University Librarian at the California Institute of Technology, was elected to the ACRL Board of Directors as Councilor.

Full 2022 ACRL section election results are available on the [ACRL website](#).

ACRL 2023 Call for Proposals

ACRL invites proposals for the ACRL 2023 Conference to be held March 15-18, 2023, in Pittsburgh, Pennsylvania. Higher education has changed dramatically over the last few years. Academic libraries are addressing an increased emphasis on remote learning, rising calls for social justice, and an acknowledged need for flexibility that supports a sustainable work-life balance. At ACRL 2023, explore these issues and more around the theme of “Forging the Future.”

Through its Core Commitment to Equity, Diversity, and Inclusion, and dedication to open and equitable scholarship, ACRL strives to develop an inclusive conference program that will provide opportunities to underrepresented groups that have been historically marginalized or excluded due to race, ethnicity, gender identity and expression, sexual orientation, economic background, age, and/or ability. The association also seeks participants from all types of libraries, positions, and experiences, including nonlibrary faculty, staff, and administrators. Individuals are encouraged to address how their proposed sessions and their personal and professional experiences will advance these goals, promote equity and inclusion, and broaden the perspectives of conference attendees.

ACRL 2023 features seven session formats to suit a wide range of presentation and learning styles. Contributed paper, panel session, and workshop proposals were due June 3, 2022. Lightning talk, poster session, roundtable discussion, and virtual conference presentations are due October 13, 2022. Complete details about ACRL 2023, including the full Call for Proposals, are available on the [conference website](#). Registration opens in September 2022.

Companion Documents to the ACRL Framework for Information Literacy for Higher Education: Journalism and Visual Literacy

The ACRL Board of Directors approved two new Companion Document to the ACRL Framework for Information Literacy for Higher Education at its April 6, 2022, virtual meeting. Developed by the ACRL Education and Behavioral

Sciences Section's Communication Studies Committee, the Companion Document to the ACRL Framework for Information Literacy for Higher Education: Journalism presents knowledge practices and dispositions important for information literacy within journalism. Developed by the ACRL Visual Literacy Standards Task Force, the Companion Document to the ACRL Framework for Information Literacy for Higher Education: The Framework for Visual Literacy in Higher Education identifies four emerging themes for learning in visual literacy. Both documents are freely available on the [ACRL website](#).

Mark Cummings, Editor and Publisher of Choice, Retires

Mark Cummings, editor and publisher at Choice, a publishing unit of ACRL, retired April 2, 2022. Cummings led Choice since 2013, coming to ACRL from a long and distinguished career in academic and educational publishing. During his time at Choice, Cummings introduced new and innovative ways of working to the unit, expanding from the traditional magazine and digital reviews into new products including sponsored webinars, podcasts, bibliographic essays, newsletters, and white papers. Rachel Hendrick, Choice's Director of Operations, will serve as interim editor and publisher. More details are available on [ACRL Insider](#).

ASSOCIATION FOR LIBRARY SERVICE TO CHILDREN - ALSC

Unit Manager: Alena Rivers – Interim Executive Director

Unit Budget:

- Budgeted revenue and expense: \$228,817/\$474,442
- Actual revenue and expense \$284,887/\$447,019

of Staff: 5.5 and 1 shared position

Revenue Stream(s) the Unit Supports:

- ☒ Continuing Education
- ☒ Membership

Status Report on Pivot Strategy, Aligned Unit Goals:

ALSC has continued to consider activities as they relate to the three Pivot Strategy Aligned Unit Goals. Activities are assessed to ensure maximum impact and alignment with the Pivot Strategy goals.

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

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

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

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

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

In January 2021, the ASLC Board approved the recommendations of the Diversifying Revenue Streams Task Force that focus on high value, high interest, proprietary content, and create an entrepreneurial culture among members and committees. A working group has been formed to further develop and prioritize the work of the task force. Recommendations will be considered by the ALSC board in June 2022. Of note, ALA Editions and ALSC are partnering on a publication honoring the Newbery award. ALSC will also identify new areas to expand Día product lines.

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

Many discussion topics that ALSC has engaged in or addressed with our membership over the last several quarters remain prominent, and newer issues focused on Critical Race Theory, anti-trans legislation, recent world events and, youth and family trauma have moved to the forefront.

- Critical Race Theory and Book Challenges – ALSC's Intellectual Freedom committee has used 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 ALSC Intellectual Freedom committee continues 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 March, the ALSC IF committee hosted the Intellectual Freedom and Youth Services Community Forum for ALSC members which highlighted resources available through ALA's Office of Intellectual Freedom. This issue remains top of mind for ALSC members and ALSC is working to find ways to be of support to libraries.
- Anti-trans Legislation - There have been more libraries and communities struggling with the increases in anti-trans legislation, including but not limited to the classification in Texas of gender-affirming care for children and child abuse. Similarly, Florida's "Don't Say Gay" bill and the traumatic erasure of opportunities for kids (and others) to see themselves and to better understand themselves. There are also the intellectual freedom concerns associated with large parts of this legislation, including current ID SB-666, which would allow prosecution of librarians based on what materials they make available to their communities.
- Recent World Events - In parts of the country we are seeing repercussions from recent world events, including an influx of Afghan refugees in urgent need of housing and resources as they resettle in our communities and initial governmental supports elapse. We are also seeing communities impacted and traumatized by the Russian invasion of Ukraine--even though Ukrainian refugees do not seem to have a pathway to the U.S. at this point, there are robust communities of Russian and Ukrainian immigrants throughout the U.S., and they are experiencing many difficulties, including fear for family members in Ukraine now. We are seeing that fear of global events reflected in some of the anxieties and fears of kids in the library. Immigrant communities will continue to sprout across the nation because

refugees/immigrants relocate to where there is work. ALSC is the place where children's librarians go for information, professional development, and the skill set needed to serve their changing communities.

- 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. Our nation also is experiencing political turmoil and a profound response to racial injustices that have received new and necessary attention. Additionally, more recent mass shootings in schools, churches and other public spaces have provided yet another backdrop for increased youth mental health issues. Our libraries are doing more now than ever to support their communities in the midst of these traumatic life changes and experiences. 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: 3643 (estimate as of May 31, 2022)

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

3643 Members

91.4k - Twitter Impressions

81,799 - Reach of Facebook posts

30,010 - Recipients of emails

43,129 – Users reached via ALSC Blog

Members/non-members/other stakeholder engagement:

FY22 May estimates show ALSC with a 1.8% increase in overall membership compared to May 2021. For FY22, budgeted dues revenue was increased by 3% and, thus far, ALSC is performing right at this target revenue with a 0% variance. While we are still navigating the impacts of the pandemic, resuming in-person conferences, including ALSC's 2022 National Institute, should keep our division on target through the remainder of the fiscal year.

- ALSC engaged 25 attendees in a virtual We Are ALSC Chat discussion focused on library service to underserved children and their caregivers.
- 2022 Institute registration is going strong with 80 individuals registered as of June 1. Registration is expected to continue to pick up as the ALSC member early bird deadline approaches on June 30, 2022. Our registration goal is 400.
- Over 300 programs were submitted to ALSC's Día registry in celebration of Día de los niños.
- Emails were sent to over 500 lapsed members from 2021 with an ask rejoin to save on spring online learning and Institute registration. Regaining lapsed members will continue to be a strong focus for ALSC through the next two fiscal years.
- The Newbery-Caldecott-Legacy Banquet is one of the most highly anticipated events of the ALA Annual Conference and we are expected to reach our table and ticket sale goals, with a net revenue of \$5,000

- Engaged 10 students in a spring online course titled, Utilizing the ALSC Core Competencies to Boost Skills and Services, earning a net revenue of approximately \$1,200.
- ALSC's popular annual Summer Reading Book Lists were published at the mid-May and have been accessed approximately 8056 times.

Describe the Most Impactful Unit Activities this Quarter:

2022 Annual Conference Planning – ALSC members, leadership and staff have been focusing on the development of programming and events for Annual conference. In addition to the annual Newbery-Caldecott-Legacy Banquet, this year marks the 100th anniversary of the Newbery award. A celebration event is planned to be hosted during Annual Conference.

- Día – Children's Day/Book Day - El día de los niños/El día de los libros (Children's Day/Book Day), commonly known as [Día](#), is a celebration every day of children, families, and reading that culminates yearly on April 30. The celebration emphasizes the importance of diverse books for children of all linguistic and cultural backgrounds. [Free program downloads](#) and a booklist are made available each year to support programming and events. This year over 300 programs were submitted through the Día registry.

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

- *The Newbery Practitioner's Guide: Making the Most of the Award in Your Work* - 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. The publication is available for pre-order in the [ALA Store](#).
- 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.

CHAPTER RELATIONS OFFICE

Unit Manager: Michael Dowling

Unit Budget:

- Budgeted revenue \$5,500 expense \$135,067 -\$129,567

of Staff: 1.5 (new Program Manager hired in May)

Revenue Stream(s) the Unit Supports:

- ☒ Continuing Education
- ☒ Contributed Revenue
- ☒ Membership

Status Report on Pivot Strategy, Aligned Unit Goals:

Membership

CRO's target is still to increase joint-student membership by 3% by end of FY22 from start of FY22. Annual Conference should provide a slight increase in student members taking advantage of discounted pricing to join and save.

Membership and CRO were able to launch the pilot membership effort with the District of Columbia Library Association for members who are not students.

Continuing Education

- CRO involved with co-facilitators in planning for Chapter Leaders Forum at Annual Conference. Thirty Chapter Leaders signed up as of June 1.
- Collaboration with CFPB on webinar on Public Service Loan Forgiveness directly focusing on librarians. Over 400 registered.
- For Financial Literacy Month, CRO collaborated with U.S. Security and Exchange Commission on webinar for librarians to highlight to assist those interested in investing.

Contributed Revenue

Launched new "ALA COVID Library Relief Fund" 2022 effort in March to provide 1.55 million in grants. Recruited nine-person review panel and held an informational webinar for those interested in applying for \$20,000 grants. At the deadline 112 applications were submitted. Panelists reviewed submissions and at end of May selected 77 public, school, academic, tribal, and correctional libraries from thirty-two states and Puerto Rico for grants.

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

- CRO is tracking concern over censorship challenges and legislation across the country. Supporting OIF and PPA by working with Chapters to encourage public to sign on to Unite Against Book Bans.

- ALA and Chapters are facing the need to migrate to a new advocacy platform with the sunset of Engage at the end of 2022. CRO is working with PPA and Chapters to review and select a new platform provider.

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

- 700 Chapter Leaders through ALA Connect, majority of them are ALA members.
- 6,000 student members through messages forwarded by ALA Student Chapters.
- Hundreds of members and non-members in promotion of 'ALA COVID Library Relief Fund'

Members/non-members/other stakeholder engagement:

- Provided Chapters information on opportunities and initiatives to reach beyond ALA members.
- Sent multiple messages to ALA Student Chapter Leaders during the quarter to inform and engage. 'ALA COVID Relief Fund' highlighted to members and non-members how ALA directly can assist them.

Describe the Most Impactful Unit Activities this Quarter:

- CRO's additional grants disseminated through "ALA COVID Library Relief Fund" will provide much needed financial assistance to 77 libraries struggling due to pandemic related budget cuts to help underserved populations most in need of their help and support.

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

- Deliver the seventy-seven (77) \$20,000 grants to grantees.
- State of the Chapters survey will take place in the fourth quarter of FY22.
- Promotion of joint-student memberships in August.

CHOICE

Unit Manager: Rachel Hendrick (interim)

Unit Budget: 404

- See ACRL

of Staff: 18

Revenue Stream(s) the Unit Supports:

☒ Publishing

Status Report on Pivot Strategy, Aligned Unit Goals:

Choice's webinar program is a good example of how Choice, as a publishing unit, is creating content that appeals to a more general audience. Our revenue and engagement statistics were bolstered this year by two ProQuest sponsored events that promoted their Academic Video Online product and attracted attendees from beyond the academic library space. In October, "Mission JOY: a panel conversation on creating happiness in troubled times" attracted 3,653 registrants who wanted to know more about the movie Mission: JOY, a documentary that explores

the friendship between His Holiness the Dalai Lama and Archbishop Desmond Tutu. In April, Choice hosted a panel discussion about the first days of the COVID-19 pandemic in New York City. The discussion included doctors and public health officials featured in the documentary *The First Wave*. This webinar attracted almost two thousand registrants. Choice's webinar program saw remarkable growth during the pandemic and while many offices are open and people are traveling again, librarians and the greater academic community continue to enthusiastically engage with our content.

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

- As we move into the final quarter of FY22, we at Choice are scrambling to make sure all our licensing contracts are paid, and our revenue is credit to the proper GL lines. This is especially hard without performance reports. It is hard to know exactly how we will close the year and if revenue is missing without these reports.
- The performance reports we do have access to (January 2022) show that revenue and expenses are on both ahead of budget. I forecast that we will end the year slightly revenue positive due to retirements and the \$153K in PPP money credited to Choice.
- The year-end outlook for advertising is very positive with expectations that we will finish the year 7% better than FY21. Webinars are our leading product followed by e-Blasts and newsletters.

of Members/non-members/other stakeholders reached during quarter: approximately 45,000

Members/non-members/other stakeholder engagement:

Choice engages with the academic library community through all its publishing vehicles: webinars, blog posts, podcasts, newsletters, social media outreach, and subscriptions to our print and digital publications. Between March 1st and May 31st:

- Our four webinars garnered almost 5,000 registrations and our Choice Media Channel on YouTube had almost 24,000 video views.
- Our ten monthly newsletters have attracted had 20,646 total subscriptions and 8305 unique contacts.
- Our weekly podcast had almost 5,000 downloads.
- Our website, Choice360, had over 230,000 page views.

Describe the Most Impactful Unit Activities this Quarter:

The third quarter results for advertising sales continues to show growth over last year by 9%. During this period ProQuest delivered another outstanding event for the latest addition to their Academic Video Online product. *First Wave*, a documentary that takes the audience inside a New York City hospital at the onset of the pandemic, generated 1,932 registrations and \$20,000 in advertising revenue.

- The monthly sponsorship for Towards Inclusive Excellence (TIE) continues to have great interest from supporters. Q3 underwriters included Rowman & Littlefield, Springer Nature & Accessible Archives and generated \$15,000 in revenue.
- Choice Outstanding Academic Titles seals are now available in the ALA Store. This will, hopefully, drive sales and will allow us to start to expand this brand. It also brings Choice closer to other ALA award brands. <https://www.alastore.ala.org/choiceOATseal>

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

This summer our equity, diversity, and inclusion-focused blog, Toward Inclusive Excellence (TIE) celebrates its one-year celebration anniversary. We have got a lot planned: a social media blitz, two new podcasts, and a Diversity Officer Round Table webinar, and a white paper.

COMMUNICATIONS AND MARKETING OFFICE (CMO)

Unit Manager: Kerry Ward, Interim Director from late April to Fall (planned)

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

of Staff: previously six, now three full-time, two-part time.

Revenue Stream(s) the Unit Supports:

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

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

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

CMO continues to work with CS on ALA Annual Conference marketing and communications strategies. As of June 14, conference revenue was at approximately 98% of the registration goal and 82% of the budget. Goal.

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 selected Mission Partners as the consultant to determine feasibility of a campaign. CMO continues to work with the Branding Group on this project. Campaign recommendations will be presented to the Executive Board at the Annual Conference.

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

- The bulk of media relations work of CMO in Q3 is responding to requests for comments on banned books and the freedom to read in school and public libraries. Deborah Caldwell-Stone continues to serve as the chief spokesperson for ALA on this issue, and due to her extraordinary knowledge and excellent interview skills, she is in much demand.
- CMO has played a significant role in ideating and developing plans for the public facing campaign in response to these book bans. Along with OIF, PPA, and our consultant partner Kivvit, CMO is poised to help launch the campaign in early April during National Library Week.
- In addition, CMO continues to partner with Conference Services to promote Annual.

Describe the Most Impactful Unit Activities this Quarter:

- **ILoveLibraries.org**

During the period from March 1, 2022, to May 31, 2022, ilovelibraries.org (ALA's public facing website) netted 84,460 total page views. The number is lower compared to last report due to ilovelibraries.org being down for a few days during the implementation of the overall site redesign in April.

- These were our top 10 most clicked articles:

[Top 10 Challenged and Banned Books of 2021](#)

[Five Reasons Everyone Should Have a Library Card](#)

[Take Virtual Tours of These Stunning Libraries](#)

[Book Censorship Update](#)

[What It Feels Like to Be a Librarian During an Attempt to Ban Books](#)

[Take Action and Unite Against Book Bans](#)

[US Book Challenges Update](#)

[Bookmobiles on Parade](#)

[Celebrate National Library Week with Us](#)

[Our Favorite Books About Libraries and Librarians](#)

Social Media

ALA and I Love Libraries Social Media Metrics

Social Media Channel	Followers/Fans	Impressions	Engagements	Clicks
ALA Twitter	229,118	1,483,567	38,304	7,930
I Love Libraries Twitter	61,103	64,224	1612	401
ALA Facebook	212,447	1,656,932	63,861	12,987
I Love Libraries Facebook	111,549	217,863	9662	2911
ALA Instagram	70,363	618,922	30,624	1,624
ALA LinkedIn	78,655	409,417	15,676	7,531

National Library Week

Social media posts about National Library Week on ALA and I Love Libraries social media channels garnered 951,292 impressions, 40,787 engagements, and 4,351 clicks. #NationalLibraryWeek was used on Twitter more

than 20,000 times and trended nationally the morning of Monday, April 4, as we released the State of America’s Libraries Report and list of Top Ten Most Challenged Books. There were more than 92,000 visits to National Library Week pages on the ALA website and more than 1500 page views for National Library Week content on ilovelibraries.org.

Unite Against Book Bans

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

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 March 1 , 2022 – May 31, 2022:
13,911 articles/mentions
7.9 billion in circulation
\$19.3 million in publicity value

Per last reporting Period, ALA was mentioned in every state in the U.S. during this reporting

Upcoming Events

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

CONFERENCE SERVICES

Unit Manager: Earla Jones

Unit Budget:

- **LLX - Budgeted Revenue/Expense: \$1,232,250/\$745,549**
- **AC - Budgeted Revenue/Expense: \$5,812,375/\$5,431,89**

of Staff: 5 staff (8 positions)

Revenue Stream(s) the Unit Supports:

- ☒ Conference Services
- ☒ Membership

Status Report on Pivot Strategy, Aligned Unit Goals:

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

- Cross collaborations with CMO, Publishing and Membership
- Securing facility contractual terms that protect ALA in the post-Covid landscape
- Encourage the curation of thought leader content for wider promotional opportunities

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

- The Annual Conference continues to be primarily affected by external trends and threats. As registration launched for June 2022, 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. Internal opportunities include directions to ALA staff on how to encourage member leaders to attend and promote the Annual Conference.
- Initially, CS faced many inquiries from constituents, with the lifting of the mask mandate and Covid protocols within Washington, DC. CS worked with ALA general counsel to update the health and safety policy that is in place for the conference.

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

Event marketing statistics reveal that through March 1 – May 31, 2022, and using our list of approximately 71K, we delivered 1,489,361 emails. There were 420,210 ppl who opened and 10,384 clicked throughs, resulting in unique Annual Conference website visits.

*There was a total of 35 eblasts during this period.

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

Conference Services provided marketing toolkits with social media copy, digital graphics, and talking points to the Exec 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 are excited to find at LLX.

- ALA Executive Board
- ALA Conference Committee
- ALA Staff
- ALA Divisions, Roundtables, and Affiliates
- Session Presenters

Describe the Most Impactful Unit Activities this Quarter:

The marketing and promotion strategy to engage ALA members, non-members, library-public, and constituents, continued this quarter, for the upcoming Annual Conference. The AC22 strategy is built on an onsite conference with a focus on “Together Again” and a virtual component titled the **Digital Experience**.

- Combination of evolving website, segmented eblasts, social media, and member/press releases.
- Targeted outreach to specific groups
- Local Host Planning Committee and Promotion Partners
- State Chapter Promotion Partners correspondence from Conference Committee Chair
- Encouraging usage of the marketing toolkit among Divisions and Offices

The first week of May, there was a promotional “thunderclap” that yielded a first 24 hours result of over 240 tweets using the #ALAAC22 hashtag – a 200% increase over the daily average. There were over 160 tweets using the #ALATogether Again – total usage of over 400 (in the first day).

The Conference Program went live April 26, allowing interested parties (registered and unregistered) to review the overall program/agenda. The scheduling feature was active May 18, for conference registrants.

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

- June – Execution of the 2022 ALA Annual Conference & Exhibition and Digital Experience
- June – Conference Services, in conjunction with the LibLearnX Subcommittee, is planning to launch the call for presentations for the first LibLearnX: Library Learning Experience. The call will be open until mid-August. The event is scheduled for January 2023.
- August – Conference Services, in conjunction with the ALA Conference Committee, is planning to launch the call for presentations for the 2023 ALA Annual Conference. The call will be open until mid-October. The event is scheduled for June 2023.

CONTINUING EDUCATION

Unit Manager: Daniel Freeman

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

Of Staff: 2

Revenue Stream or Division:

☒ Continuing Education

Status Report on Pivot Strategy, Aligned Unit Goals:

Efforts to centralize and standardize CE across the association continue., The CE unit has increased its offerings in the second half of FY22.

- The unit has expanded the standardization efforts that began with the launch of the new CE Site:
 - Implemented standardized pricing for recorded webinars.
 - Continued to consolidate bulk purchase processes, with over \$10,000 in revenue generated for divisions in the second quarter from this work.
- Work on the ALA eLearning site continues to progress, with greater utilization of the full potential. A new module for listing and producing member exclusive events will help to highlight free events as an incentive for both ALA and division membership.
- Divisions are engaging in co-branded events, with ACRL and Core running a successful joint webinar.

- Working closely with offices and divisions, we are analyzing the value of free content and sunsetting events that do not have a direct link to increasing membership or purchases of paid events.
- Promotion for several RDA events began in partnership with the Digital Reference unit. These events have already generated over \$40,000 in revenue, which will help close the FY22 revenue gap.

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

We see major opportunity in several areas: inter-unit collaboration, the repackaging of existing content, and creating “stacked” products. We are developing several initiatives in these areas and launched the LLX Rewind which is a highlight of recordings from that conference.

Units across ALA continue work on closing the eLearning revenue gap. Coordination between units—a new way of working in this area—is crucial to this effort. Increasing the volume of events is an obvious strategy for increasing revenue, but without coordination, we run the risk of oversaturating the market.

Of Members/non-members/other stakeholders reached during quarter: Over 13,000 have created accounts on the new site; over 40,000 through marketing, many more through word of mouth.

Members/non-members/other stakeholder engagement:

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

- At the end of the third quarter, sales are at approximately \$465,000 . We remain at roughly 60% of our revenue target for this quarter, which is where we ended Q2. At the end of Q1, sales were at 50% of budget.
- In addition to strong sales for the RDA Lab series, which began in April, we have launched one new RDA eCourse and three new workshops. Workshop sales are strong and the eCourse is nearly sold out only two weeks into marketing.
- We are developing a new eLearning partnership with YALSA which should lead to increased revenue for both units.

Describe the Most Impactful Unit Activities this Quarter:

- In April we launched the new session of the RDA Lab Series and developed plans for other new RDA products that will take place in late summer/early fall.
- We worked with our developer to create a member-exclusive event portal on the eLearning site. This is now live and provides offices and divisions an opportunity to highlight the benefits of membership.
- In March we launched a two-course bundle on serving underserved children and teens.
- In partnership with the Music Library Association, we launched the Music Cataloging Course Bundle, which has generated over \$20,000 in revenue to date.
- In May, we ran the new *Human Resources Crash Course* workshop, which drew over 100 registrants and brought in over \$12,000.

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

- We are developing a broad anti-racist library services eCourse that will likely launch in late summer or early fall.

- Four new RDA events are open for registration that will be taking place in August, September, and October.
- New internal partnership efforts include:
 - Plans to propose a partnership with roundtables for paid events.
 - Building a mutually beneficial eLearning collaboration with YALSA.
- We are in the early stages of developing a stacked product that will include a series of fundamental skills courses and webinar recordings designed to give new library staff a crash-course style tutorial in library work and to provide refreshers for current staff.
- Efforts to increase ALA's CE reach to the international market:
 - We are in the early stages of designing a proposed CE product for Library Staff in different global regions. This will be a primer series for new library staff—mostly paraprofessionals—to provide an overview skillset.
 - Investigating opportunities in consultation with IRO to market select to market select products that will appeal to international audiences.

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

CORE: LEADERSHIP, INFRASTRUCTURE, FUTURES

Unit Manager: Kerry Ward

Unit Budget: 415

Operating result through January 2022 (Month 5 of FY22)

	Jan FY22 Budget	Jan FY22 Actual	Variance
Revenues	\$322,625	\$234,224	(\$88,401)
Expenses	\$306,615	\$201,99	\$104,625
Net	\$16,010	\$32,234	\$16,224

of Staff: 6

Revenue Stream(s) the Unit Supports:

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

Status Report on Pivot Strategy, Aligned Unit Goals:

ALA Pivot Strategy Impact Stream: MEMBERSHIP

Core 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 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.

Update: the member value proposition remains a top priority for member leaders in Core's second year. We have made progress in developing our role in supporting advocacy, and Core President Lindsay Cronk has highlighted advocacy efforts and positions in her reports to members. We have also partnered with OCLC on a new member benefit, a sandbox for product testing.

ALA Pivot Strategy Impact Stream: CONTINUING EDUCATION

Core 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

Update: Core Interest Groups are popular and one of the easiest ways for members to get involved. We developed IG Week as a way for groups to facilitate Zoom sessions among their members and to present content in a less formal way.

Results from the March IG Week were excellent:

Total Registrations	Total Unique Registrants	# Attended Live	% Attended Live	# of Sessions
7,931	2,761	4,826	61%	25

We will next sort the 2,761 total into members/nonmembers and send special marketing to nonmembers.

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

Core's biggest concern remains membership. Based on Membership reporting, ALA membership in January 2022 was 50,549, a drop of nearly 3% from Jan 2021. Personal membership was down over 3%, to just over 45,000 members. Core membership dropped precipitously, from 5,911 to 4,795, or 18.8% year over year. Clearly this cannot be sustained for the division, so defining member value is the top priority this year. As noted above, the emphasis is on understanding the data on who has dropped and why, have they dropped ALA too or just Core. Based on that research, we are developing targeted messages for dropped members, including possible coupon codes. Core staff are working closely with ALA Membership staff in this area. We have already discovered that many members/former members are still having difficulty finding their place in Core. It is clear Core underestimated the attachment some members felt to very defined and unique structures across three divisions, and that compressing them into a new, less defined structure has left some members feeling disconnected from

the division. Revisiting our assumptions and making refinements to our structure is top of the agenda for the Core Board at the Annual Conference.

On the positive side, continuing education development is ramping up, and course registration should meet budget. Core is also adding to its line of fundamentals courses, with the launch this spring of Fundamentals of Management. Also, the Fundraising Committee, inactive in year one, is now meeting weekly and moving forward on fundraising targets for the year. Publishing, a very small contributor to year one revenue, is also building momentum in year two, with a full committee membership and a focus on new titles.

of Members (for Divisions): 4,795

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

Produced:

- 17 courses reaching nearly 270 individuals
- 11 paid and free webinars reaching over 750 individuals and groups

Describe the Most Impactful Unit Activities this Quarter:

- May E-Forum on assessment and other topics reaching scores of members
- The Core SAC Subcommittee on Faceted Vocabularies (SSFV) published a new resource: Retrospective Implementation of Library of Congress Faceted Vocabularies: Best Practices for Librarians and Programmers.
- The Call for Proposals was distributed for Core Forum in Salt Lake City in October 2022
- Core launched a new 101 course, Fundamentals of Management
- Multiple award opportunities were promoted, including the John Cotton Dana Library Public Relations Award, the ALA/AIA Library Buildings Award, and the ALA/IIDA Library Interior Design Awards.
- Core journal committees selected a new editor (*LRTS*) and two new assistant editors (*ITAL* and *LRTS*). The other of our three journals, *LL&M*, is recruiting a new assistant editor now.

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

- Over 30 Annual Conference programs and six preconferences
- Announcement of 2022 Core Forum programs and registration
- Announcement of award winners

DEVELOPMENT OFFICE

Unit Manager: Tracie Hall; Anne Manly

Unit Budget:

- Budgeted revenue and expense \$3,085,000 Budgeted; \$503,191 Expenses
- Actual revenue and expense

of Staff: 3.25

Revenue Stream(s) the Unit Supports:

☒Contributed Revenue

Status Report on Pivot Strategy, Aligned Unit Goals:

The Development Office continues to identify, cultivate, and steward corporate, foundation and individual funders, process gifts, and support other ALA Units. For purposes of this report, “Contributed Income” is defined as grant or donation that does not “pass-through” as program or sub-grant support to external partners but rather is income which remains within the association and supports ALA’s bottom line.

Currently, Contributed Income generated or managed by Development stands at \$2,669,600 of the Pivot Strategy goal of \$3,085,000, or approximately 85%. Development is engaged in active conversations with several potential funders and believes reaching \$3,085,000 by the end of the fiscal year is feasible. The \$2,669,600 figure does not include Contributed Income generated by grants accruing to other units, other than a significant grant to PPO. The \$2,669,600 figure also does not reflect planned gifts obtained during FY22, including approximately \$513,100 reported through the FreeWill platform, which allows members of the public to name ALA as a beneficiary of their estate.

Development continues to play a significant role working with other ALA Units advising in the management of grants.

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

Trends and news Development is following:

Due to limited capacity, ROI, decreased giving by the middle-class, and increased wealth disparity, some non-profits have begun to build campaigns which only target big donors. [Big Gifts Only, Please: Social-Service Group Runs Capital Campaign Targeted Solely at Major Donors](#)

As trillions in federal infrastructure dollars become available to cities and towns nationwide, grant makers have an unparalleled opportunity to insist that people of color and those who live in rural communities play a role in determining what gets built and where the jobs go. [Philanthropy Needs to Ensure That Massive Infrastructure Spending Goes to Communities That Too Often Miss Out](#)

Americans’ trust in nonprofits and philanthropy remains higher than in many other institutions, including federal and state government, corporations, and the news media, but that confidence has slipped in the years since Covid became a global calamity, according to a new report. [The Nonprofit Trust Crisis.](#)

Worrisome economic developments that could hurt fundraising continue to proliferate as inflation drags on, the stock market swoons, and new data shows that the economy contracted in the first quarter of this year. [As the Economy Contracts, Fundraisers See Another Reason to Worry .](#)

Online giving to nonprofits increased by an average of 3 percent in 2021. Last year’s study found that online giving grew 32 percent in 2020. [Online Giving Increased 3% in 2021 After Far Stronger Gains in 2020, Study Shows](#)

of Members/non-members/other stakeholders reached during quarter: 300

Members/non-members/other stakeholder engagement:

Development supported ALA efforts in the press releases regarding UABB and the Covid Relief fund, website updates regarding Ukraine Library Association support, the Satia Marshall Orange Spectrum Scholarship campaign,

National Library Week, and website issues regarding the donation check-out function on ALA's webpage and revision of the 21st Century webpage section.

Development staff member Remigio Torres continues to engage in significant interaction with members and donors via gift giving processes.

Describe the Most Impactful Unit Activities this Quarter:

ALA hired to Alford Consulting to conduct an assessment and development of a six-year comprehensive campaign that will engage ALA members, library and information service partners and vendors, advocates and stakeholders, and the general public. The process will include engaging key stakeholders in interviews and roundtable discussions, creating an oversight committee comprised of staff and volunteer leadership, and delivering a final report containing findings and recommendations that will put ALA on the best pathway towards achieving lasting social justice.

The Development Office is pleased to have added Tiffany Mack to our team in a part-time capacity. Tiffany will replace Raymond Garcia in the Executive Office as Special Assistant to the Executive Director and lend capacity to the Development office as a Development Projects Coordinator.

Tiffany is a graduate of Clemson University and the University Of South Carolina Arnold School of Public Health and has worked in the state government and nonprofit sectors for the past 11 years serving on project teams providing project management, evaluation, and grant development support and helping secure and implement nearly \$109M dollars in grant funding. She has held positions at New Morning Foundation, the South Carolina Department of Health, and Environmental Control, and as founder of a consulting firm with numerous non-profit organizations providing project management, program design, and data analysis. She has also served as adjunct faculty in the Public Health Sciences Department of South University's Columbia campus and has collaborated on and/or led several statewide projects to improve health outcomes for the state of South Carolina including: the Statewide Comprehensive Diabetes Prevention Plan and the South Carolina Obesity Action Plan. Tiffany is set to be with us through July 2023.

Considerable Development capacity in the past quarter was devoted to Conference planning and preparation. Development will host or provide substantial support to *Prison Standards Convening and Hearing*, the *Library Champion Reception*, the *Library of Congress Reception*, the News You Can Use session *Intellectual Freedom, Media Literacy, and Access to Information: A conversation with The New York Times*, presented by the New York Times and featuring Dr. Nicole Cooke, *Defending the Fifth Freedom: Protecting the Right to Read for Incarcerated Individuals: A Reading and Panel Discussion*, moderated by ALA Executive Director Tracie D. Hall, *From Partisanship to Philanthropy: How You Can Transform Your Library's Culture*, presented by the Philanthropic Advisory Group, and serving as liaison and support for the PAG Board meeting. In addition, Development worked with other ALA units and external partners to secure ribbons, signage, catering, transportation, and technical support. In addition, Development and MRS have developed a coordinated plan to approach and cultivate non-member exhibitors at Conference.

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

- Through the end of the fiscal year, Development hopes to successfully conclude current negotiations with new funders to reach or exceed contributed revenue goal.
- On-board and work with Alford Group consultants.
- Successfully conclude current MOU negotiations.

- Work with Grants, Partnerships & External Relationships Cross Functional Team to standardize and codify relations with external partners across the association and improve internal communication, cooperation, and processes.
- Cultivate Donor Advised Fund managers.
- Secure additional support for OIF efforts in combatting book bans and challenges; especially work with law firms and attorneys to support Lawyers for Libraries and Law for Librarians; successfully on-board law fellows.
- Work across units to improve ALA website and giving mechanisms.

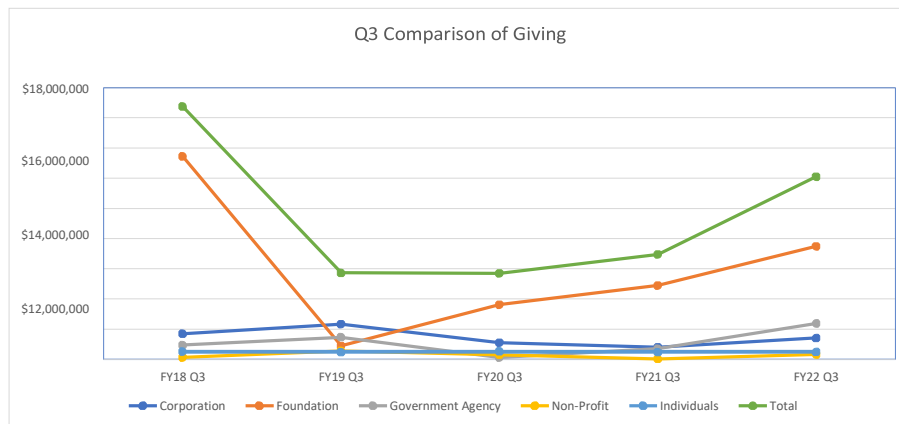
Development Office Financial Data

Donations and Grants, FY 2022 Q1 - Q3 - September 1, 2021 - May 31, 2022*

*Report produced June 6, 2022 to accommodate deadline. Due to accounting backlog, records for Feb-May are not complete.

Q3 Giving from Corporations, Foundations, Organizations, Government, and Individuals, Breakdown

Type	Number of Donors	Number of Gifts	Amount	Median	Average
Corporation	77	101	\$ 1,409,330	\$ 1,000	\$ 13,954
Foundation	22	57	\$ 7,486,353	\$ 350	\$ 131,340
Government Agency	10	25	\$ 2,385,141	\$ 5,106	\$ 95,406
Non-Profit	18	42	\$ 316,396	\$ 691	\$ 7,533
Individuals	2151	3208	\$ 509,845	\$ 25	\$ 159
	2278	3433	\$ 12,107,065	\$25	\$ 3,527



Q3 Comparison of Giving from Corporations, Foundations, Organizations, Government, and Individuals

Type	FY18 Q3	FY19 Q3	FY20 Q3	FY21 Q3	FY22 Q3
Corporation	\$ 1,709,624	\$ 2,337,157	\$ 1,100,325	\$ 813,428	\$ 1,409,330
Foundation	\$ 13,451,536	\$ 894,936	\$ 3,624,721	\$ 4,906,763	\$ 7,486,353
Government Agency	\$ 950,216	\$ 1,467,420	\$ 135,994	\$ 717,479	\$ 2,385,141
Non-Profit	\$ 135,961	\$ 563,253	\$ 301,846	\$ 34,431	\$ 316,396
Individuals	\$ 511,691	\$ 480,635	\$ 542,213	\$ 483,442	\$ 509,845
Total	\$ 16,759,028	\$ 5,743,401	\$ 5,705,100	\$ 6,955,543	\$ 12,107,065

YTD Comparison of Giving from Corporations, Foundations, Organizations, Government, and Individuals

Type	FY18	FY19	FY20	FY21	FY22 YTD
Corporation	\$ 2,387,257	\$ 2,565,410	\$ 2,692,473	\$ 1,113,897	\$ 1,409,330
Foundation	\$ 13,503,277	\$ 1,441,422	\$ 4,999,703	\$ 5,227,199	\$ 7,486,353
Government Agency	\$ 1,588,195	\$ 1,973,256	\$ 764,663	\$ 1,027,791	\$ 2,385,141
Non-Profit	\$ 218,797	\$ 745,509	\$ 334,114	\$ 55,746	\$ 316,396
Individuals	\$ 583,923	\$ 555,644	\$ 604,084	\$ 569,525	\$ 509,845
	\$ 18,281,449	\$ 7,281,241	\$ 9,395,037	\$ 7,994,158	\$ 12,107,065

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

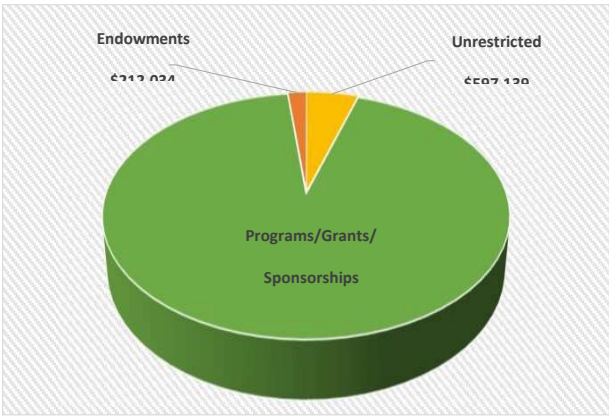
Type	ALA-Unrestricted	ALA-Program/Grants	ALA-Endowments	Units-Unrestricted	Units-Program/Grants	Units-Endowments	Total
Corporation	\$ 179,309	\$ 54,875	\$ 69,000	\$ 22,600	\$ 1,082,407	\$ 1,140	\$ 1,409,330
Foundation	\$ 34,564	\$ 2,098,000	\$ 8,959	\$ 848	\$ 5,342,982	\$ 1,000	\$ 7,486,353
Government Agency	\$ 2,250	\$ 49,475	\$ 17,400	-	\$ 2,316,016	-	\$ 2,385,141
Non-Profit	\$ 128,746	-	\$ 23,000	\$ 2,751	\$ 161,898	-	\$ 316,396
Individuals	\$ 202,664	\$ 58,020	\$ 76,162	\$ 23,407	\$ 134,219	\$ 15,374	\$ 509,845
Total	\$ 547,532	\$ 2,260,370	\$ 194,520	\$ 49,606	\$ 9,037,523	\$ 17,514	\$ 12,107,065

Q3 Comparison of Distribution of Giving by Category

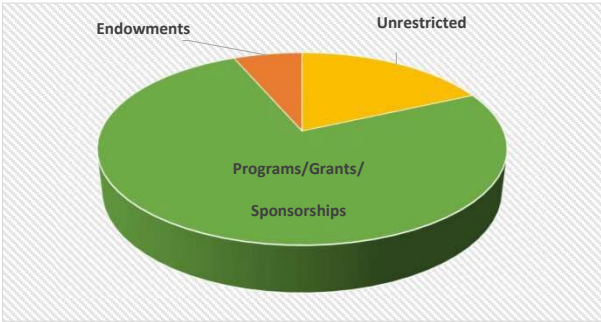
Type	FY18 Q3	FY19 Q3	FY20 Q3	FY21 Q3	FY22 Q3
ALA-U	\$ 203,993	\$ 207,947	\$ 113,180	\$ 85,664	\$ 547,532
ALA-R	\$ 591,960	\$ 1,639,677	\$ 193,797	\$ 5,002,594	\$ 2,260,370
ALA-E	\$ 136,004	\$ 199,506	\$ 602,143	\$ 551,400	\$ 194,520
UNI-U	\$ 135,372	\$ 111,962	\$ 103,740	\$ 57,895	\$ 49,606
UNI-R	\$ 15,642,057	\$ 3,543,807	\$ 4,681,528	\$ 1,251,884	\$ 9,037,523
UNI-E	\$ 49,643	\$ 40,500	\$ 10,712	\$ 6,106	\$ 17,514
Total	\$ 16,759,028	\$ 5,743,401	\$ 5,705,100	\$ 6,955,543	\$ 12,107,065

Q2 ALA and Unit Distribution

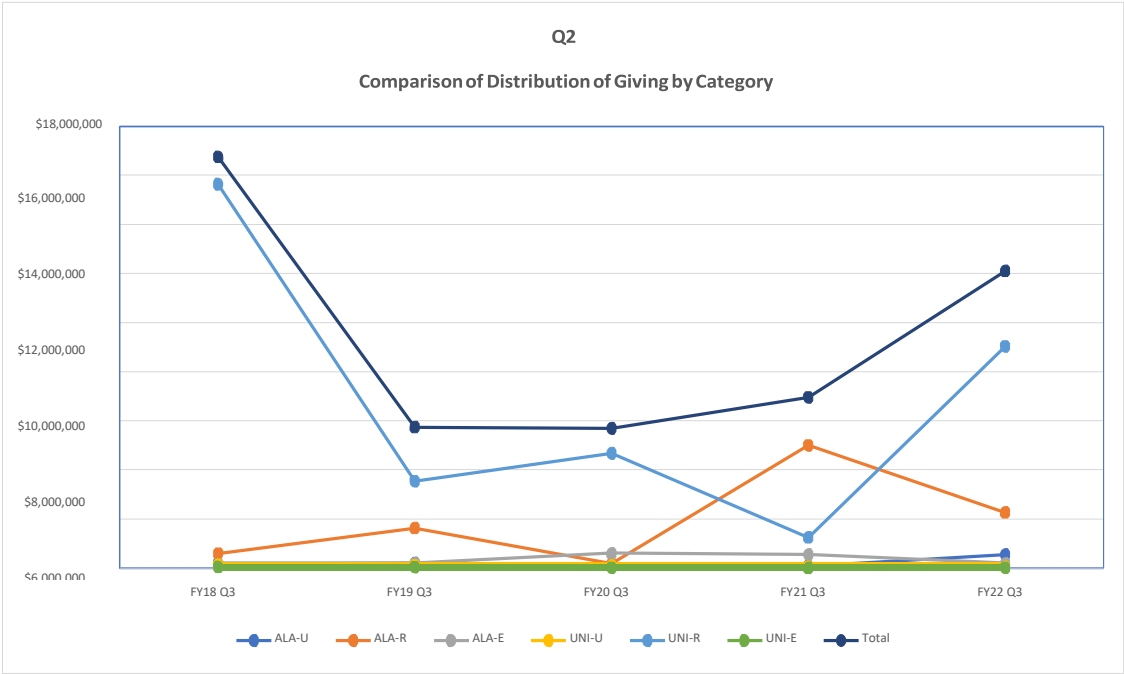
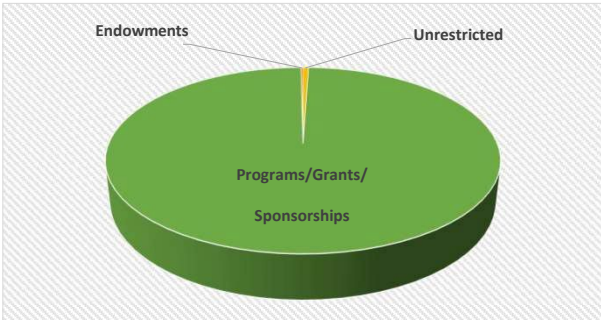
Overall
Distribution: ALA
and Units



Distribution for ALA: Programs, Endowments and Unrestricted



Distribution for Units: Programs, Endowments and Unrestricted



FINANCE AND ACCOUNTING

Unit Manager: Dina Tsourdinis

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

of Staff: 8 full-time staff and one temporary staff

Revenue Stream(s) the Unit Supports:

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

Status Report on Pivot Strategy, Aligned Unit Goals:

Streamline the closing 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. However, effective with December 2022 closing, we will begin a monthly closing process to provide more timely information to our managers. The January 2022 report was issued on May 27th.

To bring our accounting closings current, we are working on developing a plan for expedited closings.

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.

The last month the consultant will complete will be March 31, 2022. The consultant created manuals and trained the Revenue Accounting team members in May.

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

We continue to explore new ways of working to find a permanent solution to reaching our financial operations goals. Even though the remote work environment has proven to be a challenging training landscape, cross-training is critical for the full functioning of the department to reduce bottlenecks and 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.

The Accounting department has been reorganized after researching similar organizations. To improve member financial services, we added a Director of Accounting who will oversee all aspects of Accounts Receivable and Revenue

Accounting at the Association. The Controller will oversee payments, general accounting, and grants accounting. This structure will allow the Director of Accounting to be cross-trained on the monthly closing process to expedite financial reporting and to achieve cross-training of critical tasks. A 50 % position will be shared with Membership to continue uninterrupted financial services to our members.

In addition, we have cross-trained finance staff on accounting functions, and this has been a successful model.

The Accounts Payable process was reviewed and updated to eliminate delays. Our Accounts payable are current and Finance team members have been trained in filling in during peak times. The CFO receives a status report weekly to monitor progress and Key Performance indicators relating to payment accuracy and timeliness.

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. It has been difficult to find staff in A/P and we changed staffing agencies to try another source of temp to hire positions.
- Reconciling the old fulfillment center Accounts Receivable before the audit begins is an important task.
- Our systems need to be updated or replaced to avoid the multiple systems used for payment validation, approval, and processing. We received a quote from our vendor to be implemented in October with the new software release. We will also review other ERP systems designed for not-for-profit entities.
- The Grant procedures were outdated for interim financial reporting. The Grants process was updated in conformance with current Generally Accepted Accounting Principles (GAAP). All fundraising units and the accounting team will be trained on June 1st. This will be important in terms of revenue recognition in the interim.

Of Members/non-members/other stakeholders reached during the quarter: Approximately 350.

Describe the Most Impactful Unit Activities this Quarter

- Considering the number of payments we receive electronically, the process of identifying more efficient methods has started by implementing controls over the application for new credit card processors. The accounting department will be contacted any time a new credit card processor request is initiated. We believe that significant savings and efficiencies will be realized by using US Bank as our processor.
- After discussing business growth opportunities internationally with division EADS as well as unit managers, we concluded that a more efficient and cost-effective process for accepting multinational currencies. We met with Transfer mate, a payment platform for international currencies, and will apply to be able to utilize this centralized method at no cost to ALA. The payee will make payments in US dollars from any non-sanctioned country. The accounts were approved, and we are moving forward.
- Accounting and Finance team members met with the team to discuss the corrective action of the audit findings noted in the FY 2021 audit letter to management. As a result, the Controller and CFO met with IT to automate the calculation of Life Members accounting into IMIS. In addition, the inventory valuation correction will be handled by the Controller and the Publishing department in May 2022.
- We worked with Expense Reduction Analysts to centralize our vendors and find more cost-efficient ways to operate. The supplied reports were discussed with the AEDS.
- The department has worked with our audit firm to set dates for the preliminary and final fieldwork audits in July and November. We met with our audit firm to plan the audits and deliverables.
- The budget for the fiscal year 2023 was finalized after the Executive Board approved a small surplus. Additional alignment areas were identified inclusively.

- The CFO and Budget Director met to outline and document feedback on the budget process. The ideas and recommendations will help ALA improve the budget process in the future.
- We had a successful in-person meeting with the endowment trustees.
- We created a projection through the fiscal year end which was prepared by the Unit Managers. Finance review and finalization will occur shortly.

Select Future Activities and Events Through End of Next Fiscal Quarter

- Rebuilding the Finance and Accounting team and focusing on identifying quality improvement initiatives.
- Researching and applying for a property tax exemption for the Washington office condominium, would save \$75,000 annually as well as allow us to apply for a certificate of the error to recoup past payments.
- Work with Expense Reduction Analysts on implementing cost containment.
- Managing the RFP process for the Endowment Fund Investment Management process.
- Train all fundraising departments on the new grant launch procedures.
- Address all prior audit findings in preparation for the preliminary audit

GOVERNANCE OFFICE

Unit Manager: Sheryl Reyes

Unit Budget: September 2021 – January 2022 *(includes Governance and Executive Office budget)*

- Budgeted revenue: \$162,428
- Actual revenue: \$21,520
- Budgeted expense: \$1,760,827
- Actual expense: \$275,867

of Staff:

Revenue Stream(s) the Unit Supports:

☒ Conference Services

☒ 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.

In collaboration with the Membership Office, ALA President Patty Wong sent a message to all ALA Affiliates in follow up from the December 2021 virtual luncheon about the pilot membership growth project. ALA will work with Affiliates using a data driven approach to identify prospective members and create coordinated membership campaigns. The pilot program will inform strategies that can be applied to all Affiliates in the future to grow membership. Four Affiliates expressed interest to participate and two of those Affiliates started working with ALA in the pilot. An Affiliate luncheon is scheduled in June during Annual Conference to facilitate more conversation and strategic partnerships.

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

Engagement strategies are underway in organizing another virtual volunteer fair, improving our web presence, and conducting research to pilot a Governance Summit/Institute by FY23. Governance has reached out to similar Associations to ALA to gather information on member leadership development offerings. A presentation will be developed to pilot an in person offering in conjunction with LibLearnX in FY23.

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

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

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

- Transforming ALA Governance (TAG) Task Force plans to bring proposals for Council's consideration at the upcoming ALA Annual Conference Council meetings. Approval of any of the proposed action items will impact and inform the work of Governance staff and committees for implementation.
- The Constitution and Bylaws Committee plans to propose for Council's consideration to rescind the ALA Constitution and rewrite the ALA Bylaws for a more modern and flexible governing document.

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

2022 Election Participation

The certified results account for 10,405 valid ballots from 43,968 eligible members, yielding a participation rate of 23.66%. This is slightly higher from the previous year (21.07% participation)

Describe the Most Impactful Unit Activities this Quarter:

Spring Governance Meetings

During the month of April, the spring governance meetings were held, which led to the following board action:

- Approve continuation of the Barnes & Thornburg LLP as ALA's legal counsel, including continuation of Paula Goedert as ALA's lead partner.
- On the recommendation of BARC and F&A, the ALA Executive Board approves the annual increase in personal member dues for FY23 in alignment with a 3-year average of the national Consumer Price Index (CPI) of 3.6%.
- (A) The ALA Executive Board to vote that commercial posts for paid programs or services are prohibited on the ALA Connect platform. (B) The ALA Executive Board to vote that job postings are restricted to a singular opt-in community on the ALA Connect platform.
- On the recommendation of BARC and F&A, the ALA Executive Board approves the preliminary FY2023 budget proposal and Annual Estimates of Income of \$113.7 million, as reflected in EBD #3.21-21a.
- The ALA Executive Board approved allowing councilors and committee members who are attending meetings listed in the scheduler during Annual Conference to register at the early bird rate for 3 weeks after the announcement of the requirement and then go to regular registration rates. Councilors and committee members who already registered will be honored with the early bird rate.

ALA National Election Certified

The ALA National Spring Election opened the second Monday of March and closed the first Wednesday of April. Members voted for ALA leadership to serve in the upcoming year. Emily Drabinski, interim chief librarian at The Graduate Center, City University of New York has been elected 2022-2023 president-elect of the American Library Association. Drabinski received 5,410 votes, while her opponent, Kelvin Watson, executive director of the Las Vegas-Clark County Library District received 4,622 votes. To view more results of the ALA 2022 Election, click [here](#).

Newly Elected 2022-2025 Board Member Orientation Conducted

During the ALA Virtual Midwinter Council Meetings, the ALA Council elected two ALA Executive Board Members: Kathy Carroll and Sara Dallas. During the month of May, four board orientation sessions were held for the four incoming member leaders: Emily Drabinski, Peter Hepburn, Kathy Carroll, and Sara Dallas. The orientation topics ranged from financial/revenue, Division/Round Tables, professional development, and board engagement/partnerships. Members rated their overall board orientation experience a 5.0 (out of a 5-point scale).

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

Virtual Volunteer Fair

The fair will be held September 14, 2022 for the new committee volunteer application round. This is an engagement opportunity for ALA members to learn more about the different ALA volunteer opportunities.

INFORMATION TECHNOLOGY

Unit Manager: Sherri Vanyek

Unit Budget:

- Budgeted revenue and expense **\$3,582,065**
- Actual revenue and expense as of January 2022 **\$951,273**

of Staff: 8 (6 FTEs 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:

All the IT unit goals below support the Pivot Strategy in terms of IT operations and projects.

ALA Technology FY22 Projects Completed:

1. **Multi Factor Authentication in O365 – 9/2021**
2. **Membership Dues Pricing Remodeling - 9/2021**

3. **Continuing Education eCommerce/LMS – 11/2021**
4. **Retirement of Sympa (archiving & decommissioning) – 1/2022**
5. **Informz Email Marketing Migration- Working group reformed - 3/2022**
6. **Adobe Sign - 4/2021**
7. **iMIS Membership System Upgrade – test environment created – 4/2022**
8. **Blog Cloud Migration/Digital Inventory Cleanup – 5/2022**
9. **Board Meeting/Trustee Meeting/Return to Office/Office Tech. Support – 5/2022**
10. **Converting Connect Communities into iMIS based Sections (Core) – 5/2022**
11. **eStore Shopping Cart Phase II – 06/2022**

ALA Technology FY22 Projects Status:

1. **iMIS Membership System Upgrade**
Working with vendor to set up web portals, Single Sign-on, and testing integrations after a successful upgrade in our test environment.
2. **Drupal 9 Website Upgrade and Redesign**
Working with our vendor on a 20-24 month implementation. Have started meetings with internal and external stakeholders.
3. **Continue with the final phase of implementation of eStore shopping cart integration with the new fulfillment Vendor Chicago Distribution Center (CDC)**
Scheduled 06/2022
4. **Assist with the New Continuing Education Learning Management/eCommerce System**
Work with vendor to set up Face-to-Face events
5. **Continue to upgrade Shibboleth Single Sign-On Software to the remaining websites**
1 more site completed
6. **Clean up data in the iMIS membership database**
Some cleanup will happen as a result of the iMIS system upgrade above.
7. **Continue to monitor revenue and membership goals**
Connect new dashboard system.

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

Our current IT staff of six is focused on keeping operations going and project execution as time allows based on priority. Given the resource constraints, the IT department is working diligently to decrease our technology debt. Replacing outdated technology will require investment, time, and additional resources. To address this, IT will receive additional investment dollars in FY2023 to hire a Chief Information Technology Officer and to fund project work to reduce the

technology debt. IT is still searching for a Business Analyst to support process realignment and project execution. These resources are needed to meet the association's major goals for FY2022/FY2023.

Describe the Most Impactful Unit Activities this Quarter

- Adobe Sign Rolled Out - 4/2021
- iMIS Membership System Upgrade – test environment created – 4/2022
- Blog Cloud Migration/Digital Inventory Cleanup – 5/2022
- Board Meeting/Trustee Meeting/Return to Office/Office Tech. Support – 5/2022
- Converting Connect Communities into iMIS based Sections (Core) – 5/2022
- eStore Shopping Cart Phase II – 06/2022

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

ALA Technology FY22 Projects Status:

- **iMIS Membership System Upgrade**
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- **Drupal 9 Website Upgrade and Redesign**
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Connect new dashboard system.

INTERNATIONAL RELATIONS OFFICE

Unit Manager: Michael Dowling

Unit Budget:

• Budgeted	revenue	\$35,000	expenses	\$229,083	-\$194,083
• Actual (Jan)	revenue	\$687	expenses	\$79,203	- \$79,203
• FY22 Projection	revenue	\$34,500	expenses	\$227,151	-\$192, 651

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

In collaboration with Conference Services, continue to promote Annual Conference and the Digital Experience to international community. Provided invitation letters to international librarians for visas. Goal is to have 300 international registrations (4% of total) that contribute \$90,000 (3.5%). As of June 1, there are 223 international registrants from 43 countries and \$73,000. There are 39 exhibitors from outside the U.S. which account for 6% of exhibitor revenue.

Continuing Education

In collaboration with PPA and Megan Janicki, Coordinator of Libraries Build Business, an international directed webinar done in March introduced the LBB Playbook and case studies from two cohort libraries. The webinar was held twice to be accessible to different time zones. The two sessions attracted 112 participants.

The IRRT, with support from IRO, organized a webinar for 100 librarians participating in the 2022 International Library Network Program. With strong interest in participating in international conferences, IRRT hosted a webinar where 254 registrants from around the world heard from experienced internationalist- Jim Neal, Loida Garcia-Febo, and others, with tips and advice.

IRO also provided a webinar on the challenges libraries and archives five years after Hurricane Maria struck Puerto Rico.

Contributed Revenue

IRO set up the ALA Ukraine Library Relief Fund with the assistance of many other units of ALA in the beginning of May. Over 130 members and others donated \$7,500 in the first month. The funds will be sent to the Ukraine Library Association. Funds will be used for additional computers in libraries that now hosting displaced populations, materials for stress reducing programs and activities, and to repair libraries to keep them open.

Membership

FY22 goal is to increase international membership by 3%. Currently international membership remains flat. Annual Conference and join and save opportunity should provide new members.

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

- COVID-19 Pandemic to challenge all libraries and their budgets across the globe. Omicron variant rise around the continues to impact participation in in-person event. Final push for international going on for participation in Digital Experience.
- Russia invasion of Ukraine also impacts travel internationally to conferences and events. ALA launched 'ALA Ukraine Library Relief Fund' as beginning of May with the Ukraine Library Association that provides an opportunity for members to support colleagues in distress while highlighting how libraries support communities even in time of war. 'News You Can Use' session will be held at Annual in collaboration with the U.S. State Department.
- Lowering of international personal member dues beginning September 1 provides a recruitment opportunity
- IFLA. Recent events and loss of leaders poses a big challenge to the global library association and its future. ALA as a member will need to provide support.

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

- 400 members and non-members participated in webinars.
- All members notified of Ukraine Library Relief Fund. 135 contributed \$7,500 in May.
- Thousands of non-members reached through Annual Conference promotions.

Members/non-members/other stakeholder engagement:

- Promotion of Annual Conference and Digital Experience has re-engaged global community that ALA is the premier CE organization. Multiple webinars have provided touch points and learning for members and non-members. ALA's ability to mobilize a relief effort for the library community in Ukraine has reached members and communities across the country.

Describe the Most Impactful Unit Activities this Quarter:

- ALA's Ukraine Library Relief Fund has provided an opportunity for members to contribute to assist colleague suffering due to war and to make visible the ability of ALA as the national association to lead.
- New ALA-FIL Free Pass Agreement finalized which will continue long-running EDI effort for members to participate in Guadalajara Book Fair to benefit their communities with new resources.
- Webinars on multiple topics continue to provide engagement and knowledge sharing with members and non-members around the world.

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

- ALA Annual International Activities
Eight programs and events, and meetings with the assistance of the International Relations Round Table and the International Relations Committees. Will include orientation for international attendees, international visitors lounge, and international reception. Programs will be “Academic Libraries in Asia: An Overview for US Librarians to Better Serve Asian International Students,” “Global libraries as agents of leadership in our post pandemic world: Leading Change, Advocacy, and Social Justice,” “Libraries as a part of the Revitalization of Indigenous Languages and Cultures: Services, Collections, and Initiatives,” and “Ukraine Libraries Update”
- IFLA Congress, Dublin, Ireland
The IFLA Congress provides an opportunity for ALA leaders and ALA member representatives to IFLA sections interact and network with colleagues from around the world. ALA booth promotes membership, publishing, and CE.
- Increasing International Membership in FY23
- IRO will work with Membership to continue planning and roll-out of new recruitment efforts.

MEMBER RELATIONS & SERVICES

Unit Manager: Melissa Walling

Unit Budget:

ALA Membership Dues *for the five months ending January 2022 – on target*

Total Revenues Budgeted/Actual/Remaining:	\$ 4,505,792	\$ 1,940,348	\$ 2,565,444
Total Expenses Budgeted/Actual/Remaining:	\$ (100,000)	\$ (33,604)	\$ (66,396)
Contribution Margin:	\$ 4,405,792	\$ 1,906,744	\$ 2,499,048

of Staff: 9.5

Revenue Stream(s) the Unit Supports:

☒ Membership

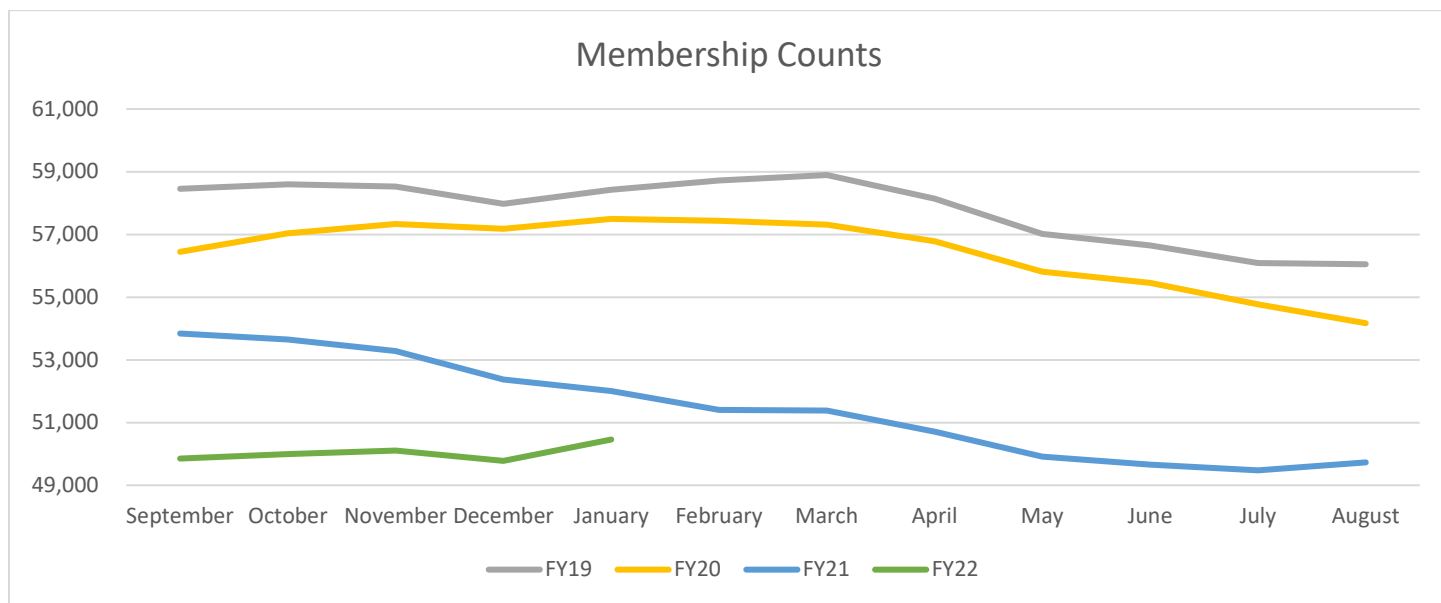
Status Report on Pivot Strategy, Aligned Unit Goals:

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

ALA membership counts as of January are at 50,459 and have been growing slightly since the beginning of the year. This is a 3% decline from FY21 and a 12% decline from FY20. This was a projected decline due to the challenges of the pandemic.

We anticipate that these numbers will continue a slow climb into the summer with a focused membership strategy and resuming in person events such as PLA and Annual Conferences. However, with 2/3 of ALA members paying dues from their own pocket, ALA dues revenue remains sensitive to economic conditions including decades high inflation rates.



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

Membership Turnaround:

The number one priority remains rebounding ALA membership using a data driven approach. The primary focus is increasing Regular Members and converting Students to full membership. We recognize that the membership rebound will take time and that is reflective of the number of furloughs and layoffs that the LIS community has absorbed during the protracted pandemic as identified through exit surveys. We remain focused on short- and long-term strategies.

A few recruitment highlights from the last quarter that we continue to monitor, improve and scale:

- Activated a joint membership recruitment campaign with the District of Columbia Library Association. While this is a localized campaign, we believe this is laying the ground for future chapter collaborations around ALA conference locations.
- Coordinated with the Public Programs Office to activate ALA or division memberships for 100 recipients of the Libraries Transforming Communities initiative along with an engagement campaign specifically designed for rural librarians: <https://www.ala.org/membership/small-rural-libraries-center> Also partnered with PPO for a membership campaign directed to the Let's Talk About It: Women's Suffrage grant recipients.
- Leveraged a discount on the Learning Management System to incentivize lapsed members to reinstate.
- Encouraged Student Members who are not a member of a division or round table to join.

Board Approved Actions for Code of Conduct Committee:

In April, the Executive Board voted to prohibit paid commercial postings in Connect communities and to create one designated community in Connect where ALA members can share job postings. The implementation of the motions that were approved in April, 2022 (reference [EB 12.33.1](#)) that relate to Connect should improve some of the important ratios and key metrics (**Email Open Rates**, the **Average Replies/Threads** Ratio, and the **Unsubscribed Rate** to Digests of communities) that we use to indicate the value of Connect to members. These motions are now under review by the Code of Conduct Committee for implementation. The Code of Conduct Committee is meeting on June 14, 2022, to discuss in detail.

ALA Connect continues to be a key member benefit. We continue to observe the growing atmosphere of Connect, monitor key metrics, and benchmark ourselves to other association Higher Logic communities to ensure that Connect remains a relevant useful tool for our members.

Some of the key takeaways from our observations over the past two quarters are:

- The ALA Connect Community is a primarily benefit for members. All users must login to access most areas of our community. Non-members in most communities have a limited experience. Most Parent Community homepages has content that is public but has designated there most important content for members of their communities. All Member forum communities, but one Member forum (**Association for Library Service to Children**) that is associated with a parent community cannot be accessed by a non-member.
- The number of communities in our ALA Connect ecosystem is growing. We are currently at **1659** communities. **Committees** are **60%** of the ecosystem, followed by communities classified as **Communities** at **24%**, and the third highest share of communities in our ecosystem are Workplace communities which represent **10%** of the total.
- We have **50,868** Active Users in ALA Connect. Close to **1 out of 4** Active Users in ALA Connect are Non-members. Passive Marketing and automations are being used to promote the benefits of membership to Non-members.
- Users are becoming more comfortable with engaging with ALA Connect as a communication tool and knowledge-sharing tool. This is indicated by the increased number of **emails sent** in Connect, the increased **open rate** of that email; and the increase in number of **library entries** and the positively correlated **library views** of these documents shared.

of Members/non-members/other stakeholders reached during quarter: All 50,000 members, Lapsed members, Connect users, select non-member groups

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

Conference Engagement:

Significant resources this quarter went into conference attendee engagement at the Public Library Association and Texas Library Association Conferences along with laying the groundwork for a successful ALA Annual. The ALA Membership booth was blended into the PLA Lounge for the first time which creates an integrated experience. This was a model that was tested at the American Association for School Librarians conferences and has proven successful and reflects the connection between ALA and divisions.

At TLA, membership staff were also able to work alongside the Office of Intellectual Freedom staff to build exposure to the Unite Against Book Bans Campaign.

ASGLCA Dissolution:

As a follow up to the April 2022 Executive Director report, staff engaged previous ASGCLA President, Carrie Banks, in a conversation about the ASGCLA dissolution and membership engagement. Carrie believes that the engagement of previous ASGCLA members, and initiatives is as expected. A few of the member groups were not active in recent years and therefore are not likely to be active in the new structure. With the vast majority of ASGLCA groups thriving with the new structure, there is confidence in this work continuing and Carrie is planning to provide ongoing feedback to ALA. Many groups are convening at ALA Annual as well.

The membership office has contacted former ASGCLA members three times via email but is planning one final recruitment push this summer in the hopes to recover a few additional members.

Lastly, ALA is recruiting for the Accessibility Officer and ALA Staff has completed the Disability Inclusion Training provided by Access Living and coordinated by the Office of Diversity, Literacy and Outreach Services as well the Public Programs Office.

Describe the Most Impactful Unit Activities this Quarter:

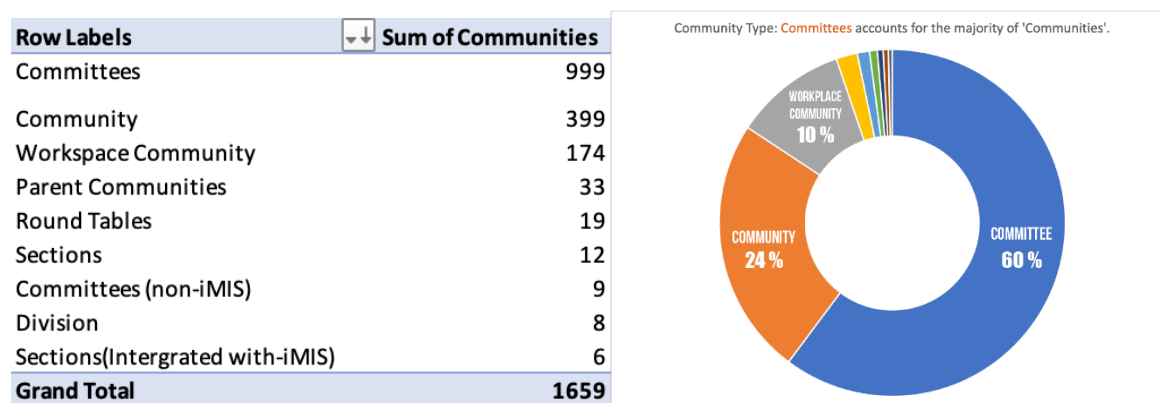
- **Membership Model** – The ALA Membership Committee continued to work on the pricing for the simplified membership model and are starting the work of socializing the new elements of the model with key stakeholders.
- **Dues Standardization:** As a result of the recent action taken by Council for Round Table standardization of bylaws and dues, the MRS team has worked closely with the Round Table Coordinating Assembly Co-Chairs and Danielle Ponton, Program Manager, ALA Round Table on determining next steps for adoption and implementation. Currently, each Round Table is selecting one volunteer to join a Task Force to work on the pricing for the standardized dues. They will work closely with the membership office on this effort. Their first meeting will take place in early April.
- **User Access in Connect – Member and Non-Member:** As we begin to monitor the user experiences of the Members and Non-members on Connect, we have discovered that ALA Connect continues to be mostly a member benefit. All users of Connect must authenticate to view the Parent Communities in Connect, with one exception – the ALA home page. Of the **33** Parent Communities that consist of the **American Library Association** homepage, the **Public Programs Office** homepage, the **Division** and **Round Tables** home pages, and others, most have public content that members and nonmembers can view alike, however many of these communities have also designated their most important content on these pages as “members-only”.

The majority of Member Forums associated with Parent Communities are “Invitation-only” and can only be viewed by their members. Only the **Association for Library Service to Children** has a Member Forum that is public, though the non-member experience is limited. Nonmembers can view discussions and content that is deemed public, however, the profile pictures and the profile information of the members that belong to these communities cannot be viewed by non-members. Non-members also cannot post or reply to discussions in this Member Forum. In addition to its members-only Members Forum, the **American Association of School Librarians** provides an **AASL Chapters** Forum that is public. In this forum, members and non-members alike can join, post, and reply in this community.

Round Tables follow a similar pattern as most of the Parent Communities. The content available on **16** of the **19** active Round Table Parent Community homepages can be viewed by all users. Three Round Tables (**Film and Media Round Table**, **Graphic Novels and Comics Round Table**, and **Rainbow Round Table**) home pages are

“members-only.” All Round Tables Member Forums associated with their Parent Communities are members-only and their content cannot be accessed by non-members.

- **Connect Community Inventory:** Over this period, we have begun to audit our Connect Community to understand our ecosystem and explore how members and nonmembers are experiencing ALA Connect. Currently, we have **1659** communities. If we explore the different Community types in Connect, communities classified as **Committees** represent the largest share of our Connect ecosystem, followed by those that are classified as **Community**, and then our **Workspace** communities.



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

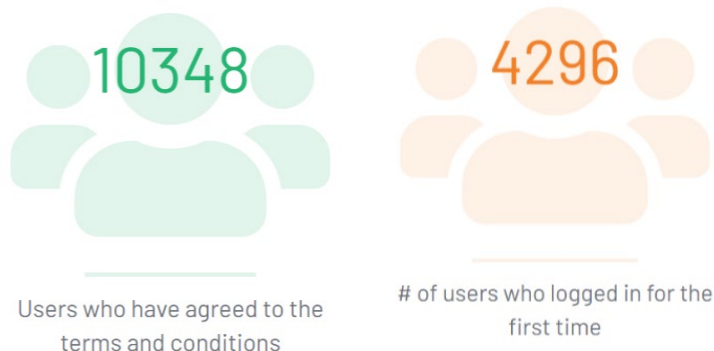
- **iMIS Upgrade:** The membership office will work closely with the IT office to test the new iMIS upgrade. Key features will include an improved “My Account” page for users as well as the potential for improved processes for staff.
- **New Member Onboarding:** As we reach the end of the first year of the new member onboarding campaign, staff will complete an audit of the project as a whole and design improvements. We will also be activating a Student Members only new member onboarding communication plan.
- **Membership Web site:** Avenue M research indicated that often lapsed members perceive the cost of membership to exceed the value. With this in mind, we are auditing the membership web site to clearly articulate the value of membership and outline membership benefits. One of the key benefits of membership is the ability to join a division or round table.
The membership cross functional team also recently completed a benefits inventory across the association. This is a visual representation of the value that a member receives and includes some information on additional benefits available through division and round table membership.
- **Customer Service:** As we enter the quiet season, the membership team will lay the foundation for improved customer service for FY23. We hope to eventually invest in some customer service technologies to better track and measure the customer experience.

Dashboard: ALA Connect Key Performance Indicators

Current Active Users

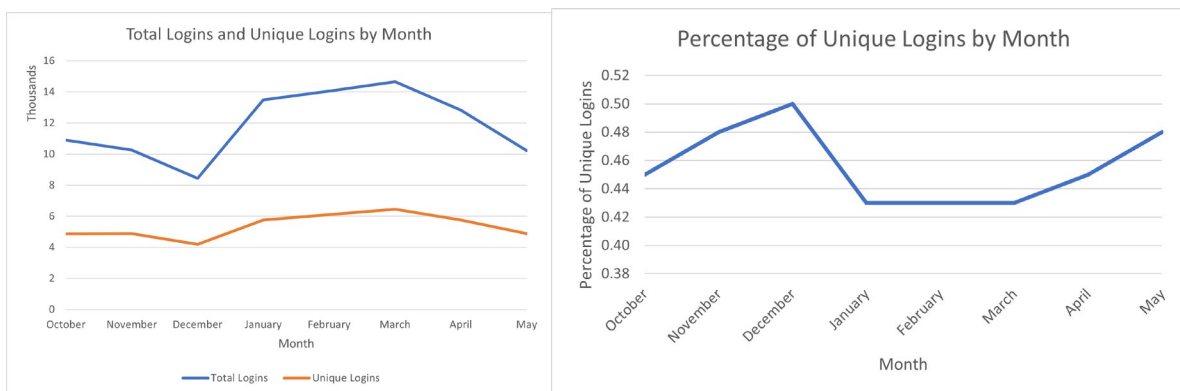
We currently have **50,868** Active Users. Active Users in Connect are users who have logged in within the last 120 days or have an active subscription. Since October we have **35,646** active ALA Members and **13,792** active Non-Members in

Connect. Since October, **10,348** users have agreed to the Terms and Conditions and **4,298** users have logged into Connect for the first time.



Logins to the Web site

We are also monitoring the number of times that users are logging into Connect and the relationship of those logins that are unique. Here is a snapshot of some of the data that we are monitoring which all reflect a constant trend in usage and engagement. We have had consistent **Total Logins** into Connect and **the Percentage of Unique Logins to Total Logins** except for the months of January through March of this year has been at **45%** or higher. The months of **January 22' – March 22'** saw a significant spike in **Total Logins**.



Engagement

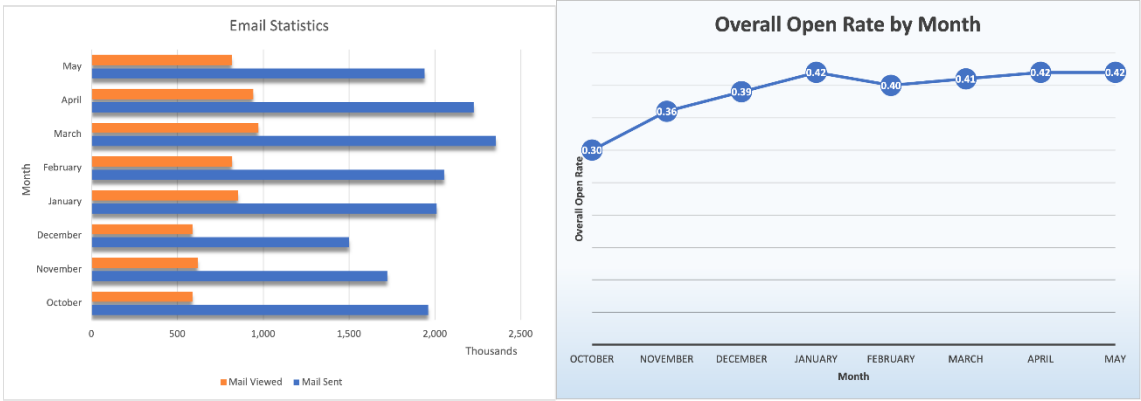
As we continue to monitor engagement in Connect for insight on how individuals are engaging with Connect, we have begun to track more data points such as **Average Replies/Thread**, various **Email Statistics**, **Library Statistics**, and **Unique Contributors**.

Currently, we have an **Average Replies/Thread** ratio of **.74**. The benchmark for communities such as ours is **1** or better. Future actions such as removing paid commercial posts and having one community that distributes a digest with job postings should improve this ratio.

Email Statistics

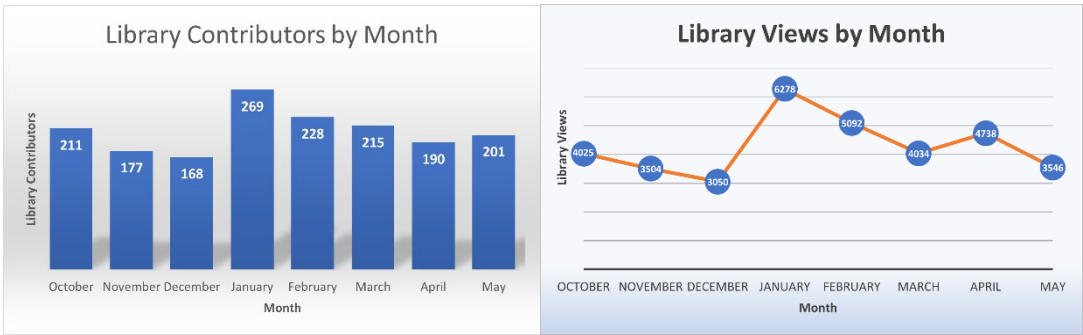
Connect users consistently use email as a method to communicate. The number of **emails sent** had a slight dip in the months of November and December but has rebounded and has continued to grow since October. The **open rate of emails sent** has also grown from **30%** to **42%** over the last two quarters.

As a practice, ALA Connect users then can determine how they receive email and its frequency. Due to customization, one of the key metrics that we are tracking to measure the health of our community is our overall **unsubscribed rate** to these communities. Right now, we have unsubscribed rate of **17%**. If we benchmark against other Online communities, it is suggested that we attempt to achieve a **15%** unsubscribed rate or lower.



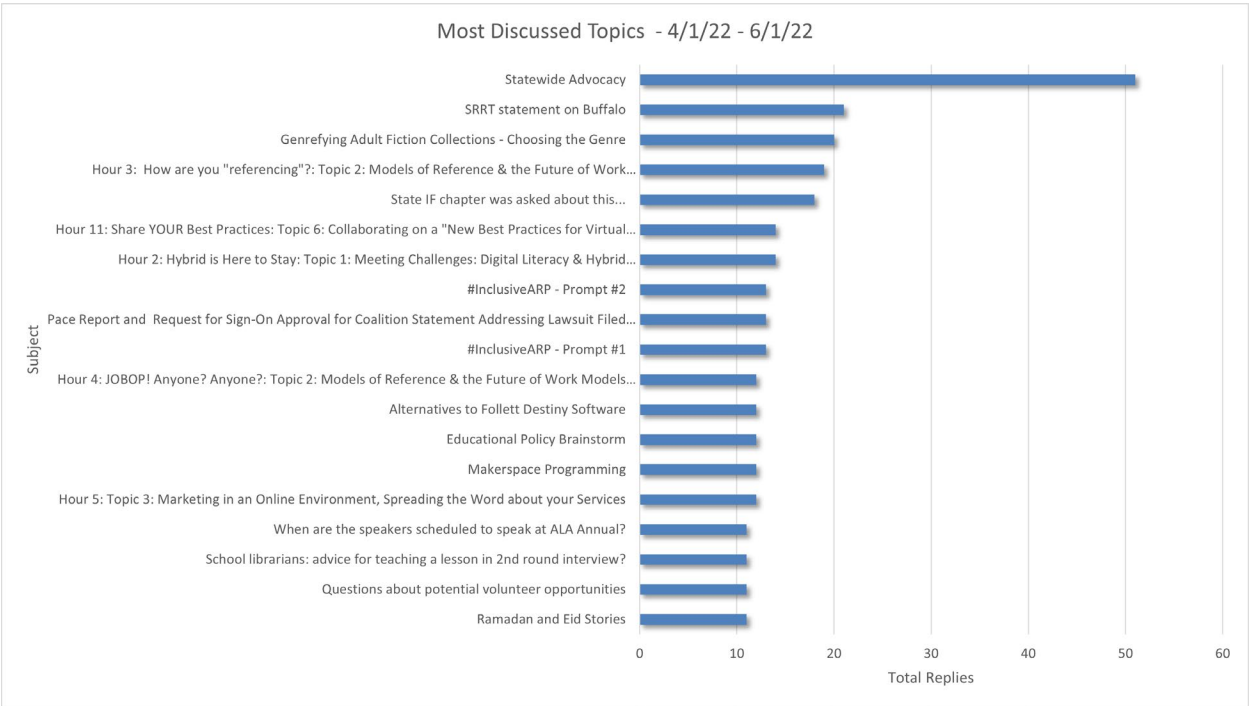
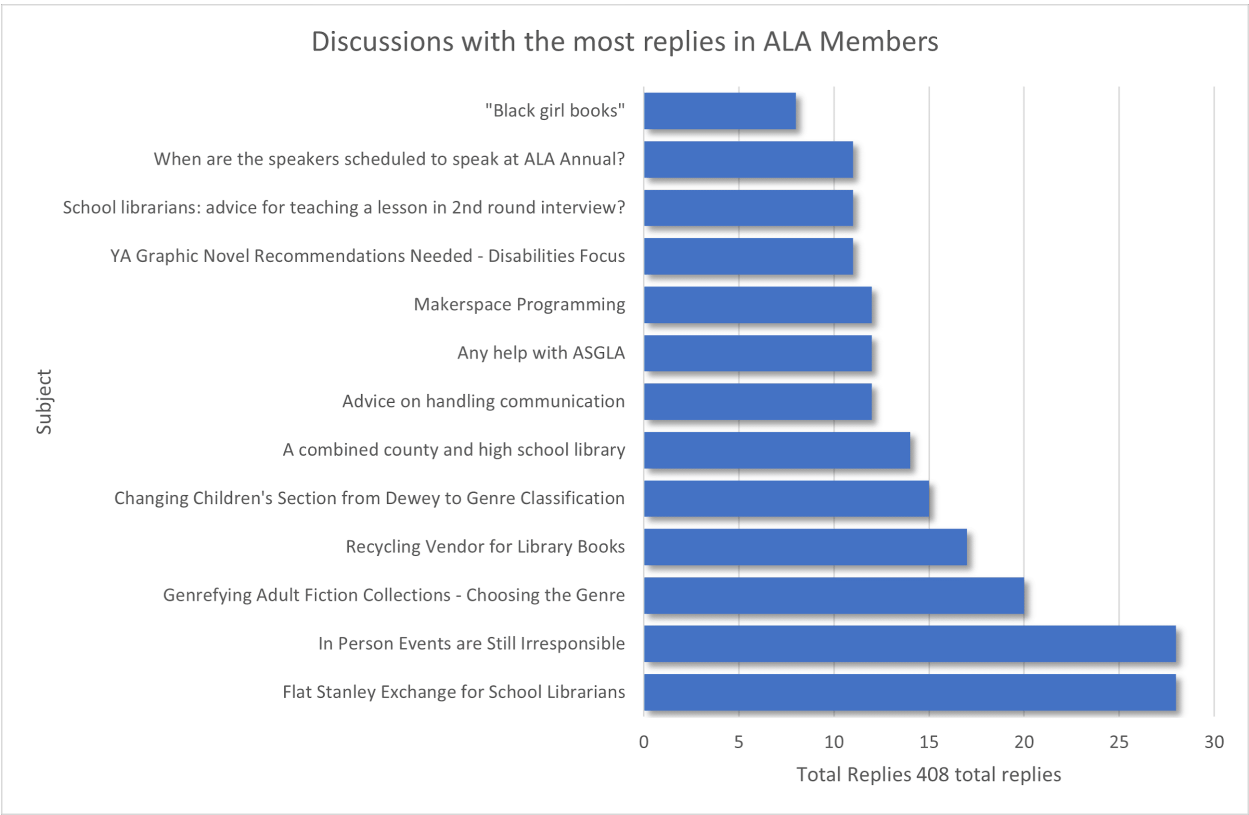
Library Statistics

Connect users continue to become more accustomed to sharing and storing pertinent information utilizing the Connect Library functionality. During the last two quarters, January and February of this year have exhibited the highest contribution to community libraries. January and February of this year also exhibited the highest number of **library views** for the past two quarters.



Discussions

We continue to monitor trending topics in the community. Below is a chart of the 15 most active topics in the ALA Members Community during the last two quarters and a chart of the most discussed topics in ALA Connect from April and May.



OFFICE FOR ACCREDITATION

Unit Manager: Karen O'Brien

Unit Budget:

Budgeted revenue and expense YTD 22 Apr: Revenue \$88,829 Expense \$167,589

Actual revenue and expense YTD 22 Feb: Revenue \$82,603 Expense \$131,043

of Staff: 2

Revenue Stream(s) the Unit Supports:

☒ Continuing Education

☒ Contributed Revenue

☒ Membership

Status Report on Pivot Strategy, Aligned Unit Goals:

Ensure quality and accessibility of ALA-accredited degree programs

- 63 institutions with ALA-accredited programs, newest added with January 2022 decisions.
2 programs In Precandidacy status: University of Central Missouri and Middle Tennessee State
1 program in Candidacy status for Initial ALA-accredited status: University College London, UK (visit Spring 2024, decision in June 2024)
- Trended metrics on diversity, faculty/student ratios etc., available publicly at [Excel]
https://www.ala.org/educationcareers/sites/ala.org/educationcareers/files/content/Trended_stats_to_2020_01.xlsx
- Revised Standards draft proposal ready for feedback reflects: the state of the expanding field, ALA's core values, and the urgency to broaden equity, diversity, and inclusion in LIS education and libraries.

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

- 1) Providing opportunities for feedback on the proposed [2022 Update to the ALA Standards for Accreditation of Master's Programs in Library and Information Studies | About ALA:](#)
 - Take the survey to provide feedback <https://www.surveymonkey.com/r/TMQ92H9> available April 4, 2022 through May 13, 2022
 - Attend a forum via video conference on Friday, May 20, 2022 from 1:00-2:15pm. Register by contacting accred@ala.org with the subject line: Register for online Standards revision forum [Meeting recording: https://ala-events.zoom.us/rec/share/GXzSY_TAZjyVh8kGVb88IEI4fuTcgiPZV6o...]
 - Attend a video conference on Wednesday, June 15, 2022, from 11:00am-12:00pm, focused on the Canadian context
 - Attend a forum in-person on Saturday, June 25, 2022, 5:30 p.m. – 7:00 p.m. 2022 ALA Annual Conference, Washington Marriott at Metro Center (775 12 St NW), Jr Ballroom Salon 1, Washington, DC.

- 2) Closing spring comprehensive reviews with two programs on Conditional status which can lead to a Withdraw decision which can be appealed
- 3) Managing 31 programs in the comprehensive review cycle

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

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

Spring review visits engaged an estimated 500 stakeholder ALA reviewers, volunteers, leaders, and LIS program personnel.

Describe the Most Impactful Unit Activities this Quarter:

Comprehensive program reviews and gathering of feedback on Standards revision.

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

- Reviewer and appeals process training Thu afternoon at ALA Annual Conference (AC)
- CoA meeting at AC to close reviews (in person at AC & virtual)
- CoA forums on proposed Standards revision (in person at AC and virtual)

OFFICE FOR DIVERSITY, LITERACY AND OUTREACH SERVICES (ODLOS)

Unit Manager: Kevin D. Strowder

Unit Budget:

- Budgeted revenue and expense – \$14,500 vs \$246, 987
- Actual revenue and expense – \$24, 623 vs \$145, 760

of Staff: 3

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

☒Publishing

Status Report on Pivot Strategy, Aligned Unit Goals:

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

ODLOS has released (with an initial targeted list and support from the NALCOs) the RFP that invites a multi-sector group of consultant firms to consider partnership for the launch and execution of the Diversity Counts & Longitudinal Study RFP that remains and extension of the quantitative data. We hope to have the first set of data produced in late fall of 2022.

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

Virtual sessions thrive and are now ending for the season after early July. We have reached capacity which has called for us to seek out new talent (cohort of trainees) for implanting the trainings. A new strategy for meeting the demand is necessary and in process.

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

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. Annual should allow for new connection and collaboration.

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

As a follow up to the April 2022 Executive Director report, staff engaged previous ASGCLA President, Carrie Banks, in a conversation about the ASGCLA dissolution and membership engagement. Carrie believes that the engagement of previous ASGCLA members, and initiatives is as expected. A few of the member groups were not active in recent years and therefore are not likely to be active in the new structure. With the vast majority of ASGLCA groups thriving with the new structure, there is confidence in this work continuing and Carrie is planning to provide ongoing feedback to ALA. Many groups are convening at ALA Annual as well.

The membership office has contacted former ASGCLA members three times via email but is planning one final recruitment push this summer in the hopes to recover a few additional members.

Lastly, ALA is recruiting for the Accessibility Officer and ALA Staff has completed the Disability Inclusion Training provided by Access Living and coordinated by the Office of Diversity, Literacy and Outreach Services as well the Public Programs Office.

Action from COO: Schedule a Spring meeting with the chair of the Advisory Committee, to discuss and agree upon a final plan of action.

ODLOS interacts with the remaining inherited interest groups (below) on a regular basis through meeting scheduling, new award creation, webinar coordination, etc.

- Bridging Deaf Cultures
- Library Services for Dementia/Alzheimer's
- Library Services for the Incarcerated and Detained
- Library Services to Persons with Print Disabilities
- Universal Access (was on the dissolve list, however, leadership requested a meeting at annual)

Coretta Scott King Book Awards Round Table

CSK is preparing for their 53rd Annual Coretta Scott King Book Awards Breakfast which will be held on Sunday, June 26 from 7am – 9:30am at ALA Annual. All 2022 winners and honors will be in attendance for a plated meal. Members will also host a Legacy Memorial Celebration on Saturday, June 25 from 4-5:30 at the MLK Branch of the DC Public Library. Unfortunately, their annual Virginia Hamilton Reception was cancelled due to the winner, Nikki Grimes, having a surprise illness. As part of their efforts to promote their new Round Table status, CSK will have a booth at the conference and will have giveaway items to those who sign a “future round table member” form. CSK is working closely with ALA and ODLOS staff to follow the checklist of projects needed to be completed before September 1st. Lastly, on May 23rd, CSK hosted a “CSK Spotlight Webinar” on the 2022 Author and Illustrator winning book “Unspeakable: The Tulsa Race Massacre”. 99 people attended CSK’s first ever webinar which had special guest Carole Boston Weatherford on the panel. CSK hopes to hold similar webinars more regularly.

EDI Trainings

As libraries and library associations seek to embed equity, diversity, and inclusion (EDI) in their missions, visions, and strategic plans and to establish shared EDI foundations, frameworks, and definitions among their staff, ODLOS experiences a high demand for trainings. In 2019 we had several facilitators to meet this demand, including staff from ODLOS and the Chapter Relations Office; as of now we have one primary facilitator, the ODLOS Assistant Director, Literacy and Continuing Education, with the ODLOS Director co-facilitating on interactive trainings. Given the continued changes in staffing and the redistribution of roles and responsibilities, it is not viable to rely only on ODLOS staff for facilitation and meeting the training demand. Thus, we seek to build a new cohort of facilitators, which we envision including ALA members with a background in workshop facilitation and interested ALA staff. We have the curriculum developed for a portfolio of trainings, which includes our flagship training, EDIcon, our most popular offering. As a strategic goal for FY23, we plan to: develop a train the trainer model for EDIcon, including a structure for trainer compensation; recruit a small cohort of facilitators; hold virtual or in-person trainings for the cohort; and provide initial co-facilitation opportunities for the cohort with ODLOS staff. During her ALA presidency, Loida Garcia-Febo approached ODLOS with the idea of establishing EDI Fellows, which would comprise a cohort of speakers selected annually and build on the [EDI Speakers Bureau](#). We have that vision to inform our planning, and we hope that incoming ALA President Lessa Kanani'opua Pelayo-Lozada and the Executive Board will support this effort and help highlight how it serves the Association, our strategic direction on equity, diversity and inclusion, and the profession.

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

Members reached during quarter (committees, EDI Assembly, RTs, Interest Groups) = **7,342**

Combined members and non-members reached during quarter = **12,680**

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

Social Responsibilities Round Table

SRRT remains committed to raising awareness to social justice causes within ALA and have put forward multiple resolutions to Council during FY22 including a resolution calling for Student Loan Cancellation which was approved by ALA Membership during the virtual ALA Membership Meeting on Thursday, March 17th. They will end FY22 by hosting

their Annual Afternoon of Social Justice which will take place in July and consist of 3-4 webinar sessions focused on Social Justice work within the library community.

Rainbow Round Table

At ALA Annual 2023, RRT will host their 3-year postponed 50th Anniversary Gala at the Museum of Contemporary Arts. The Stonewall Book Awards were announced during LibLearnX in January 2022. As part of the announcement, RRT also released their Top Ten Children's and Young List and their Adult Fiction and Non-Fiction Top Ten list. RRT's multiple standing committees continues to work on different projects through archiving, updating digital resources and websites, and working on programming for ALA Annual. They will celebrate all the book and non-book awards at ALA Annual on Monday, June 27th from 4pm – 6pm.

EDI Assembly & ODLOS Advisory Committee

COO will present to Council during ALA Annual the motion to support a restructure of the EDI Assembly and ODLOS Advisory Council. It has been granted by the COO committee nearly unanimously. ODLOS's EDI Assembly (more specifically the sub working groups) maintains a consistent mission of elevating thought, knowledge, and collaboration in the field. Through discussion forums and text review, the Assembly aims to uncover best practices for challenging existing models within libraries. The ODLOS Advisory Committee, as the umbrella entity to the assembly, under leadership from the chair, has requested additional support. Managing both the committee and assembly pull more time than anticipated and the consistency in oversight is desired.

Describe the Most Impactful Unit Activities this Quarter:

Accessibility Officer

ODLOS consulted with the Accessibility Assembly, Access Living (consultants), ED Tracie Hall, and PPO to bring this role to life. It has not been posted to multiple platforms calling for talent to submit professional materials for review. There is a great amount of intention behind this position which means that there is no immediate rush but an underlying desire to support existing work within the association such as the Interest Groups and ALA-wide Accessibility strategy.

Disability Inclusion Institute

After a three-month planning and revision process with expert Consultants, the first ever ALA Disability Inclusion institute took place over four days in May of 2022. This brought together about 98% of ALA staff to learn, collaborate, inquire, and implement practical tools related Accessibility and Disability. As the data from attendees' surveys is still being captured, ODLOS is working with PPO and Access Living to map out a strategic plan for sustainability and program evaluation for the upcoming FY 2023.

Key Literacy Initiatives

ODLOS is engaged in several key literacy initiatives in coordination with the ALA Committee on Literacy and Literacy Assembly. The newest of these is a webinar series on digital equity through literacy. With digital equity a central focus of Patty Wong's presidency and of the ALA, and on the heels of the recent *American Libraries* Special Report: Toward an Equitable Digital Future, we saw the opportunity to elucidate the interconnectedness of digital equity and literacy. The first webinar, Digital Equity through Literacy: Framing the Conversation, was held on May 31st and included panelists John Agada (Senior Fellow, ALA Center for the Future of Libraries); Cassandra Barnett (Program Advisor for School Libraries, Arkansas Department of Education's Division of Elementary and Secondary Education); Ken Bigger (Senior Fellow, ALA Center for the Future of Libraries); and Mimi Lee (Director of Literacy and Learning, New Jersey State Library). The speakers provided definitions and framing around digital equity and literacy and offered perspectives on

digital equity through literacy in public and school libraries. The second webinar, yet to be scheduled, will explore specific library programs and services that further digital equity through literacy.

Another, ongoing literacy initiative is a strategic planning process led by a working group of members of the Committee and Assembly. Envisioned and sponsored by ALA President Patty Wong, the strategic planning process aims to amplify the importance of literacy to the field and to reimagine and anchor the concept of literacy within the Association. Throughout the early stages of the process, the group engaged the ALA community through open forums guided by structured questions – essentially informal focus groups – that generated a significant amount of stakeholder input. The group has also completed a SWOT analysis. This input and analysis will inform the work of a strategic planning consultant. An RFP has been drafted, and the plan is to launch the call for proposals soon after ALA Annual. Finally, members of the Committee and Assembly continue to update and add new sections to the [ALA Literacy Clearinghouse](#). The most recent additions are sections on [Literacy for the Justice-Involved and Recently-Released](#) and [Data Literacy](#).

Building Cultural Proficiencies for Racial Equity Framework

Since its formation in late 2019, the joint ALA/ARL Building Cultural Proficiencies for Racial Equity Framework Task Force has worked toward *Cultural Proficiencies for Racial Equity: A Framework*. The group has held status updates at the June 2021 ALA Annual Virtual Conference and Exhibition and April 2021 ACRL Conference and will host a third session at ALA Annual on “Timely Updates on the Building Cultural Proficiencies for Racial Equity Framework” on Sunday, June 25. Christina Fuller-Gregory, Assistant Director of Libraries, South Carolina Governor’s School for the Arts and Humanities, joined the task force in May 2021 and led the framework development process. An open call for feedback on a draft framework launched in January 2022, and comments were collected through March 2022. The finalized framework is now in the approval process and in June goes before the Board of Directors of the four partner organizations: the American Library Association, Association of College & Research Libraries, Association of Research Libraries, and Public Library Association.

Spectrum Scholarship Program – Masters and Doctoral

This year, during the ALA Annual Conference and Exhibition, we will welcome nearly 160 Scholars from the 2019, 2020, and 2021 cohort for the Spectrum Leadership Institute. They will engage in programs that center on “diversity within the field, building community partnerships, and Librarian activism” as tools for leadership enhancement. Scholars will network with key stakeholders during a luncheon and be officially recognized during our Spectrum Closing Ceremony.

We received 250+ applications for our 2022-2023 cohort (for which we have nearly 20 named sponsors) and plan to award a total of 60 Scholars. They have been selected by a Jury of library professionals in the field (many who are Spectrum Alumni and ALA members) through an extensive review process. ODLOS will announce all awarded Scholars post conference, while also highlighting their named sponsor institutions. The orientation/onboarding of Scholars will take place in September 2022 where they will be given the opportunity to meet with their sponsors for a thank you and introduction to their graduate studies. The process for selecting scholars this year brought about major gaps within the ALA clearinghouse and Spectrum Jury process that needs attention and further collaboration.

The program remains in a unique state of transition and turnover. Our Spectrum Advisory Council continues to innovate on programming, navigate the digital divide, and maintain community with the scholars. 97% of scholars in this cohort are returning for another semester of their term. We have seen an increase in current scholars seeking to get involved beyond the basic expectations of the program. To build on this momentum, the ODLOS team has collaborated to map out a more structured mentorship program.

The Spectrum Doctoral Fellowship Advisory Council and the partner schools have identified 7 Fellows for the award. Initially we had anticipated 8 but the selection process led to a smaller cohort. All awardees have been contacted and accepted the position. The forthcoming press release will acknowledge all contributions of those involved in this

initiative. We have also met to talk through the revised budget, leadership institutes over the next few years, and additional support to help manage the grant scope.

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

Ethnic Multicultural Information Exchange Round Table (EMIERT)

EMIERT is in the process of creating a new Award under the Jewish Information Committee. Once approved by the donor, a donation will be made post-mortem and will celebrate and support projects created by Jewish Librarians in ALA. EMIERT is also working to create more programming focused on multicultural work within the library community. They will be hosting a “Taste of the Town” during ALA Annual 2022 which will be held on Friday, June 24 in the late afternoon.

ALA Working Group to Condemn White Supremacy and Fascism

ODLOS Director has been charged to be the Staff Liaison to support the efforts of this group under the leadership of Cindy Hohl and Nichelle Hayes (chairs). Both are being advised by former ALA President Julius Jefferson. This member group has come together to implement crucial work and is now seeking feedback from Council once presented during the 2022 ALA Annual Conference.

Revision of 2017 Standards and Guidelines for Service for the Library of Congress Network of Libraries serving the Blind and Physically Handicapped

ODLOS and LSSPS (Library Services to Special Populations) are updating the standards with NLS under a contract to be implemented for the onboarding of a project coordinator to facilitate meetings to update the standards over the next 2 years. Danielle Miller, IG Leader of LSSPS suggested we use the same project director from the last revision period.

After a budget and contract is set, all stakeholders will identify a Working Group and Advisory Committee. This work plan will differ if more of the work can be done virtually with less travel. The opportunities for user / member / librarian input are essential and members of the 2015-2017 working group indicated that the public hearings scheduled during ALA Midwinter and Annual for the different drafting stages are valuable to discuss the changes and receive feedback.

Update: ODLOS is currently in the process of being granted this opportunity now that the full proposal has been submitted.

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

[Preliminary Work Plan for Development of the Standards.docx - Google Docs](#)

The Advisory Council, ODLOS, and external partners will hold *Standards* hearings at ALA Annual Conference on Thursday, June 24, to include currently and formerly incarcerated individuals. The half-day session will also feature approximately a dozen other panelists whose subject matter expertise in the area of information practice and policy in contemporary detention facilities. We have plans to convene the advisory group for debriefing meetings after the hearings to discuss long term impact and implications from the conversations and relationships built.

Multiple stakeholders from this committee will host ALA conference programming related to *Standards* to raise visibility and opportunities for discussion among the 13,000+ attendees expected to attend. To further take on this pivotal

moment, ALA leadership will host external DC meetings and programs to gain interest, get buy-in, and source widespread feedback for updating the 1992 *Standards*.

OFFICE FOR HUMAN RESOURCE DEVELOPMENT & RECRUITMENT (HRDR)

Unit Manager: Lorelle Swader, AED

Unit Budget:

- Budgeted revenue (\$ 56,350) and expense (\$ 223,001)
- Actual revenue (\$ 9,769) and expense (\$81,240)

of Part-Time Staff: 3 (1.6 FTE) (shared staff with the ALA-APA and HR)

Revenue Stream(s) the Unit Supports:

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

Status Report on Pivot Strategy, Aligned Unit Goals:

Unit Goal to increase Membership by 5%

- The New Members Round Table (NMRT) is currently running 6% above their projections for membership.

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 LLX. We are hopeful to do better at the Annual Conference in Washington, DC.

of Members: NMRT (1273)

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

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

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

Describe the Most Impactful Unit Activities this Quarter:

The ALA-Wide Scholarship Clearinghouse application process closed, and several juries are in the process of selecting their winners to be announced during the Annual Conference. The Committee on the Status of Women in Librarianship (COSWL) sponsored *Women and Their Role in Climate Change*.

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

- The Committee on the Status of Women in Librarianship (COSWL) will sponsor a webinar: *Women in Librarianship and Wellness*.
- The Committee on Education (COE) will present the latest revision of Core Competencies for the generalist librarian to Council for adoption.
- Pre-Conference Events Sponsored by the JobLIST Placement & Career Development Service:
 - Virtual Individual Career Coaching Sessions will be held, June 8-9, 2022;
- Onsite Annual Conference Programming to be held in the JobLIST Placement & Career Development Center:
 - *Library Career Alternatives*
 - *Ask HR*
 - *Define Your Personal & Professional Image and Brand — Before Others Do it for You!*
 - *Stress Management for Real Life*
 - *Career Checkmate! How to Design your Career Path Using Self-Awareness Techniques and A Strategic Game Plan*
 - *Open House/Job Fair*
 - *Salary Negotiations*
 - *Self-Care During Stressful Times*

OFFICE FOR INTELLECTUAL FREEDOM (OIF)

Unit Manager: Deborah Caldwell-Stone

Name of Unit: Office for Intellectual Freedom

Unit Budget:

- Budgeted revenue and expense \$45,000 / \$404,538
- Actual revenue and expense: \$22,792 / \$103,749

of Staff: 2.6 FTE (3.0 FTE for OIF, 0.6 FTE for FTRF) with two vacant positions.

Revenue Stream(s) the Unit Supports:

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

Status Report on Pivot Strategy, Aligned Unit Goals:

As a general fund unit, the overall strategy and unit goals of the Office for Intellectual Freedom focus on initiatives that increase the value of membership, promote member engagement, and support ALA's core values and overall mission. As such, it provides indirect support for increased dues revenues and contributed revenues. In addition to ongoing work to eliminate costs, re-evaluate programs, and redirect resources to products and services that best serve member needs, OIF pursues opportunities to generate revenue through the sale of books, products, and digital resources and solicit contributed revenue in support of its programs.

During FY22, OIF ended support for "Choose Privacy Week" and reduced production costs for the Journal of Intellectual Freedom. Our long-term goal is to evaluate and re-imaging our challenge reporting and challenge support tools and services in order to improve the member experience and provide better data to identify member needs.

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

- Challenge support remains a priority for OIF staff. Utilizing email, phone calls, and virtual meetings, The Office for Intellectual Freedom collaborates with librarians, trustees, and members of the public to address challenges and book bans in schools and libraries nationwide. The volume of challenges and book bans reported to OIF in 2022 remains high, continuing the trends identified in the Fall of 2021.
- Increased demand for continuing education by OIF staff and member leaders within ALA's intellectual freedom community has resulted in greater outreach and member service via continuing education and professional development opportunities for OIF staff.
- OIF staff engaged with members of the press to promote 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; media contacts included the New York Times, the Washington Post, Yahoo News, PBS Online, C-Span, Associated Press USA Today, and other media outlets.
- OIF continues to work in partnership with the Public Policy & Advocacy Office to assist state chapters addressing adverse state legislation by identifying and advising on substantive legal issues and assisting with advocacy.
- OIF and PPA's State and Local Advocacy Office are now working in partnership to manage and direct ALA's new initiative, "Unite Against Book Bans," which launched during National Library Week.

Member Outreach and Engagement (03/01/22 – 05/31/22):

- OIF received 302 unique challenge reports during this quarter and provided direct support in 211 cases.
- Notable Challenges:
 - On May 18, 2022, a Virginia congressional candidate sought and obtained an ex-parte order finding probable cause that two books, *Gender Queer* and *A Court of Mist and Fury*, might be "obscene for unrestricted viewing by minors." Both books have been the target of censors seeking to remove the books from school libraries in Virginia Beach. At the same time, the congressional candidate filed a public records request demanding the names and contact information of Virginia Beach school librarians. The Virginia Beach school board has since removed *Gender Queer* from school libraries. OIF, PPA, and the Freedom to Read Foundation are working with the Virginia Library Association and the Virginia Association of School Librarians to protect targeted librarians and preserve Virginia residents' freedom to read these books.
 - Llano County Public Library (TX) Since November, 2021, county commissioners have supported an advocacy group's censorship campaign, removing dozens of books from the library, terminating access to its e-book platform, and appointing those challenging books to the library advisory board.

In April 2022, a group of library card holders in Llano County filed suit in federal district court, alleging that these actions are abridging the users' First Amendment right to read and access the challenged books.

- Intellectual Freedom News: 2820 primary subscribers reached weekly (118 new subscribers)
- Intellectual Freedom Blog: 49 posts; total visits: 76,087; total views: 90,087 (March 1 – May 31 snapshot)
 - Leading Posts by Page View
 - [2020 Banned & Challenged Books List](#) 7851 views
 - [Auditing the First Amendment at Your Public Library](#) 4417 views
 - [Challenged Book Spotlight: Me and Earl and the Dying Girl](#) 1929 views
 - [Memes, Fair Use, and Privacy](#) 1803 views
 - [Harry Potter and 20 Years of Controversy](#) 1521 views

Additional Advocacy, Education and Outreach:

Director Deborah Caldwell-Stone

Presentations

- Mid-Hudson Banned Books Symposium, March 5, 2022, "The Best Defense"
- Association of Independent Schools of Maryland and DC, March 18, 2022, "They Said it's Not Appropriate: Preventing & Responding to Book & Resource Challenges"
- Chief Officers of State Library Agencies, March 23, 2022
- Public Library Association, March 23-25, 2022, "Prepare Your Library for Today's Censorship Battles," "How to Respond to a First Amendment Audit," "Ask an Attorney," and IF Forum
- Ohio Library Council, April 18, 2022 "Critical Conversations."
- Texas Library Association, April 23-27, 2022, "Legal and Policy Issues Related to Material Challenges"
- Tennessee Library Association Intellectual Freedom Committee, May 10, 2022, "Defending Pride"
- American Writers Festival, May 15, 2022 "The Slippery Slope of Censorship."
- Southern Adirondack Library System Annual Meeting, May 16, 2022 Keynote
- Council of Chief State School Officers (CCSSO), May 17, 2022, "Challenges and Threats to Intellectual Freedom."
- King County Public Library, May 18, 2022 "Intellectual Freedom, Libraries and You."
- Maine Library Association, May 23-24, 2022 Keynote, "Intellectual Freedom in Difficult Times."

Publication

"Intellectual Freedom," Chapter 38, in *Information Services Today: An Introduction*, Sandra Hirsch, Editor

Assistant Director Kristin Pekoll

Presentations

- Florence-Lauderdale Public Library, March 2, 2022, "Censoring Childhood Classics"
- San Jose State University iSchool, March 17, 2022 Class Visit
- University of Alabama March 23, 2022, Class Visit

- Public Library Association, March 23-25, 2022 “Prepare Your Library for Today’s Censorship Battles,” “How to Respond to Challenges,” IF Forum
- WiLS (Wisconsin Library Services) March 25, 2022, “Intellectual Freedom Refresher”
- Syracuse University, March 29, 2022 Class Visit
- Missouri Association of School Librarians, April 11, 2022, “You Are Not Alone: The Emotional Side of Censorship.”
- School Library Journal Webinar, April 13, 2022 “Fighting Censorship: Tips & Resources for Countering Challenges to Books”
- Ohio Library Council, April 18, 2022 “Critical Conversations.”
- Texas Library Association, April 25, 2022, “Update on Trends in Censorship and Challenges”
- LA County Public Library, May 5, 2022, Professional Development Webinar
- Panhandle Library Access Network, May 10, 2022, “Libraries on the Frontlines of Democracy.”
- American Writers Festival, May 15, 2022 “The Slippery Slope of Censorship.”

Describe the Most Impactful Unit Activities this Quarter:

Launch of [Unite Against Book Bans](#) Campaign (with Public Policy and Advocacy)

- [Top Ten Most Challenged Books List for 2021](#) ([State of America’s Libraries Report](#) - Advocacy)
- [Letter Submitted to the Civil Rights and Civil Liberties Subcommittee](#) of the U.S. House Committee on Oversight and Reform for “Free Speech Under Attack: Book Bans and Academic Censorship,” a hearing held on April 7, 2022.

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

- [Intellectual Freedom Programming at ALA Annual 2022, Washington, D.C.](#)
 - [“Addressing Critical Race Theory Challenges in Your Library,”](#) Saturday 6/25 at 2:30 p.m.
 - [“Privacy Field Guides: Take Action on Privacy in Your Library,”](#) Monday 6/27 at 10:30 a.m.
 - [“News You Can Use: Unite Against Banned Books: The National Campaign,”](#) Saturday 6/25 at 4:00 p.m.
 - [“News You Can Use: Intellectual Freedom and the Law: Obscenity, Minors’ Rights, and First Amendment Audits Redux,”](#) Sunday, 6/26 at 9:00 a.m.
 - [“News You Can Use: Updates from the Working Group on Intellectual Freedom and Social Justice,”](#) Monday 6/27 at 2:30 p.m.
- [Freedom to Read Celebration \(2022 IF Awards\)](#) Friday, June 24, 2022, Washington Convention Center, 7:00 p.m.
- [Where Intellectual Freedom and Social Justice Meet: A Call to Action](#), Virtual conference hosted by the Freedom to Read Foundation, July 12 and 13, 2022, 11:00 A.M.-3:00 p.m. Central both days.
- “First Amendment and Libraries,” ALA e-Course (September 2022) (With ALA Continuing Education)

PUBLIC LIBRARY ASSOCIATION (PLA)

Unit Manager: Mary Davis Fournier

Unit Budget:

- Budgeted revenue and expense: FY22 Budget: \$3,916,000 revenue/\$3,064,252 expense
FY22 Jan 22 Budget: \$270,000 revenue/\$595,911 expense
- Actual revenue and expense: January 22 Close actuals: \$309,110 revenue/\$470,014 expense

of Staff: 12.5

Revenue Stream(s) the Unit Supports:

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

Status Report on Pivot Strategy, Aligned Unit Goals:

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

Goal 1: Increase PLA Membership by 2%

Goal 2: Increase PLA CE revenue by 2%

Although membership continues to lag behind pre-pandemic rates, as of the January 2022 financial report, PLA membership dues at \$217,760, about 12% ahead of the budgeted \$194,792. With January's PLA National Conference early bird registration promotions, PLA began to experience the conference year "bump" in membership renewals.

PLA's Web CE revenue lagged at \$10,518 behind a budgeted \$18,750. This is largely due to our decision to suspend production of new Web CE in order to focus diminished staff resources on PLA 2022 National Conference production, including the expanded Virtual Conference. New Web CE resumed production immediately following the National Conference.

Although January 2022 financials reflect neither revenues from PLA's National Conference, nor the bulk of expenses, we feel the decision to focus our diminished staff on conference efforts paid off. A total of 6,005 librarians, exhibitors, speakers, guests, and others registered for PLA 2022, and the number of exhibitor representatives was 1,025. Additionally, our virtual conference participation was at an all-time high with 1,186 individual registrants.

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

In addition to producing an in-person National Conference during the Covid-19 pandemic, PLA continues to focus on supporting the field as it moves toward recovery in the midst of a disruptive social and economic environment.

- As libraries continue confronting unprecedented attacks on the freedom to read, PLA invited library colleagues to participate in a March virtual town hall, hosted a day long Intellectual Freedom Forum at the PLA National Conference in Portland, and. Continues to explore the best ways to support public library workers in navigating coordinated challenges. Participants in all of these activities have been called to action to support colleagues in local school libraries who are facing challenges; advocate for the role of public library staff in making selection decisions and managing requests for removal, in accordance with established library policy; and amplify and support community voices not heard during challenges, especially from historically marginalized groups and students. PLA continues to collaborate with OIF, PPA and other divisions to provide library workers support as we “Unite Against Book Bans.”
- As we look to FY23, a non-conference year for PLA, our focus will be on non-conference revenue streams. PLA will focus on member recruitment and retention, contributed income, CE, and data revenue streams. One exciting product developed in alignment with ALA’s pivot strategy of Data, Research, and Design, and in partnership with ACRL is [Benchmark: Library Metrics and Trends](#). This is the newest tool for data-driven planning and advocacy in libraries, with free data access levels and more in-depth subscription levels. The first survey conducted through Benchmark was the [2021 Public Library and Staff Diversity Survey](#). The survey collected data about staff salaries and hours, roles within the library, staff representation, hiring and retention strategies, and equity, diversity, and inclusion goals and activities. The results, which will be published later in 2022, will provide nationally representative data to inform and engage elected officials, the media, and funders to increase awareness of and support for library workers. The results will also help PLA respond to requests for up-to-date, nationally-valid data about staffing and diversity from public library staff.
- PLA’s biggest programmatic and membership engagement opportunity was PLA’s 2022 National Conference. Here are highlights:
 - Due to ongoing health and safety concerns relating to the spread of COVID-19, 2021 brought continued uncertainty regarding in-person gatherings, especially large events like professional conferences. With the [PLA 2022 Conference](#) on the horizon, the PLA staff worked closely with its board to determine the best way to move forward with the information available. Together, staff and elected leaders decided to forge ahead with in-person and virtual options for its national conference, set to be the [first major in-person library conference since 2020](#).
 - As a precaution against COVID-19, proof of vaccination or negative test before was required to participate in the in-person conference. With more than 100 programs, the conference highlighted and shared innovative and responsive best practices for public library programs and services that addressed evolving community needs—ranging from managing censorship attempts to enabling access to telehealth, entrepreneurship, and other vital resources for diverse communities.
 - The event provided an economic boost to Portland's economy, as attendees picked up more than 8,760 total guestroom nights and took advantage of local businesses, restaurants, and bars. According to Travel Portland, the event provided substantial revenue to Portland businesses, with an economic impact of an estimated \$4.4 million in revenue.
 - The conference brought back its popular career center, which offered attendees one-on-one appointments for résumé review, interview coaching, and mentoring. It also hosted a career fair for job seekers and hiring libraries. A collaboration between PLA and My People’s Market offered attendees the

unique opportunity to shop locally within the exhibit hall and support Portland business owners of color. The beloved How-To Stage taught attendees new skills such as how to play the ukulele and how to be an ally.

- The general session speakers drew in a packed auditorium and featured: *New York Times* best-selling author, podcast host, and professional troublemaker Luvvie Ajayi Jones; author and lawyer Brittany K. Barnett; *Jeopardy!* champion Amy Schneider; and actor, writer, producer, and former associate director of the White House Office of Public Engagement Kal Penn. Additional authors and audiobook narrators included Clothilde Ewing, Willy Vlautin, Brian Selznick, Jordan Ifueko, Sonia Manzano, and Alex Gino.

of Members (for Divisions): 8,431 (January 2022 stats)

of Members/non-members/other stakeholders reached during quarter (for all Units): PLA: 16,695 – 8,431 (members) +4355 (webinar registrants) +354 (PL magazine subscribers) +3555 (non-members Conference registrants)

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

In the first quarter of 2022, PLA hosted six webinars, with five of the webinars being free and drawing over 600 registrants each. In March, PLA engaged with members, non-members, exhibitors, and other key library stakeholders when it hosted the first national in-person conference for public libraries since the pandemic. Over 6,000 attendees and exhibitors registered for the PLA 2022 Conference and Virtual Conference. PLA gained over 1,000 members from the time Conference registration opened through January 2022. At the end of the quarter, PLA launched new and improved digital literacy courses on its free training platform, DigitalLearn.org. Through a partnership with AT&T, PLA has engaged with external audiences to promote the courses and a new incentive program that will fund digital literacy workshops across the country.

Describe the Most Impactful Unit Activities this Quarter:

- PLA announced the availability of new and updated digital literacy courses and training materials developed as part of PLA's [collaboration with AT&T](#) to bring digital literacy training to families. In addition, PLA launched the [Digital Literacy Workshop Incentive Program, supported by AT&T](#), which will provide resources and funding opportunities (of up to \$7,000 per library) for public libraries to use the new materials to lead local digital literacy workshops. The curated collection of courses—available in English and Spanish—help newly connected families to build skills and confidence using technology and are now freely available on PLA's digital literacy training site, [DigitalLearn.org](#). Through the collaboration with AT&T, we have been able to add and update courses, improve training materials, and add more Spanish translations. The courses address essential skills such as getting started with email, navigating websites and commonly used apps, operating search engines, online safety, video conferencing, and more.
- "[A Trauma-Informed Framework for Supporting Patrons: The PLA Workbook of Best Practices](#)," published by ALA Editions in collaboration with the Public Library Association (PLA), was just released. Presented by the PLA Social Worker Task Force, the book provides a collection of powerful tools for library workers. It is filled with prompts, exercises, and best practices that shed light on how trauma can affect people, helping build confidence and ability to support library patrons.
- PLA partnered with Freedom Lifted to launch a new virtual training, [Justice at Work in Public Libraries: Understanding Power, Oppression, Resistance and Solidarity](#), led by nationally-recognized trainer, facilitator, and leadership coach Mia Henry. The virtual training series was created specifically for public library workers to

take the course on their own schedules and at their own pace. It teaches frameworks that get to the heart of social justice; provides participants with a shared language to use to talk openly and honestly with each another; and create plans of action to shift culture and develop practices that advance justice in their libraries. Learn more at <https://learninglab.freedomlifted.com/courses/justice-at-work-public-libraries>. The Justice at Work in Public Libraries training was *developed in partnership with PLA's Committee on Equity, Diversity, Inclusion, and Social Justice (EDISJ), and a portion of the proceeds from this go toward enhancing PLA's EDISJ work.*

- In September 2019, the Association of College, and Research Libraries (ACRL), along with ALA's Office for Diversity, Literacy and Outreach Services (ODLOS); the Public Library Association (PLA); and the Association of Research Libraries (ARL) formed the Building Cultural Proficiencies for Racial Equity Framework Task Force with the goal of developing and disseminating the framework to ALA members and the broader field. As a resolute stakeholder and primary co-funder of this effort with ACRL, PLA is proud to support the presentation of **Cultural Proficiencies for Racial Equity: A Framework**. Per the introduction, "This framework has been developed as a tool both theoretical and practical in its orientation, as a guide for developing personal, organizational, institutional, and systems-level knowledge and understanding of the nature of racism and its many manifestations." PLA anticipates this framework will advance understanding of the role that the library sector has played in contributing to and sustaining systems of inequity and oppression and provide tools for opposition to these systemic wrongs.
- In alignment with ALA's pivot strategy of Data, Research, and Design, PLA has partnered with the Association of College & Research Libraries (ACRL) to launch [Benchmark: Library Metrics and Trends](#), the newest tool for data-driven planning and advocacy in libraries. The first survey conducted through Benchmark was the [2021 Public Library and Staff Diversity Survey](#). The survey collected data about staff salaries and hours, roles within the library, staff representation, hiring and retention strategies, and equity, diversity, and inclusion goals and activities. The results, which will be published later in 2022, will provide nationally representative data to inform and engage elected officials, the media, and funders to increase awareness of and support for library workers. They will also help PLA respond to requests for up-to-date, nationally valid data about staffing and diversity from public library staff.

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

Between now and the end of the Fiscal Year, PLA will:

- Support programming for [public librarians at ALA Annual Conference](#). PLA also resumed its annual Members Welcome Breakfast, a complementary event for PLA members to network, socialize, and hear from White House Correspondent April Ryan.
- In the wake of COVID and national social justice work, the PLA board has revisited and refreshed its strategic plan. Implementation of refreshed plan will strengthen PLA's commitment to EDISJ, both as an area for member professional development and internal operations.
- On-board [three new board members](#)
- Welcome four long-anticipated new staff members in areas of membership & marketing, data & research, and programs & partnerships.

PUBLIC POLICY AND ADVOCACY

Unit Manager: Alan Inouye (Interim, AED) *Kathi Kromer departed ALA June 10, 2022

Unit Budget:

- Budgeted expense: \$2,740,214
- Actual expense: \$844,621 as of January 2022

of Staff: 13 FTE, Recruiting for 3 vacant positions

Revenue Stream(s) the Unit Supports:

☒ Membership

Status Report on Pivot Strategy, Aligned Unit Goals:

- Public policy events at PLA, several ALA Chapter conferences and Instagram Live events on digital equity
- Outreach to divisions/affiliates about advocacy/policy news to promote within their constituencies via their digital communications channels
- Resources for congressional staff: ALA also authored three chapters in the Committee on Education Funding's annual Budget Briefing Book, which was released on May 25.
- Resources for advocates: [2022 year-round advocacy calendar](#) and [Unite Against Book Bans resources](#).
- Let our legacy be justice:
 - ALA endorsed the Housing for All Act (S.3788/H.R.6989) introduced by Sen. Alex Padilla (D-CA) and Rep. Ted Lieu (D-CA). The bill would authorize \$10 million per year for 10 years for the Substance Abuse and Mental Health Services Administration to fund libraries to carry out pilot programs to address the needs of individuals experiencing homelessness or individuals at risk of homelessness. Sen. Padilla included a quote from ALA President Patty Wong in his [press release announcing the legislation](#).
 - On March 29, in response to the White House's fiscal year 2023 budget request, [ALA welcomed the administration's proposal to create a new Office of School Infrastructure and Sustainability](#) within the Education Department, to facilitate funding and resources for improving school facilities, which include school libraries.
 - On May 18, the [Re]Build America's School Infrastructure Coalition, of which ALA is a member, [applauded the House Education and Labor Committee's approval of the Rebuild America's School's Act \(H.R. 604\)](#), which would authorize new funding to modernize school campuses, including school libraries.
- Increased coordination with ALA offices and divisions:
 - Worked closely with OIF, CMO and consulting firms to create new resources for the Unite Against Book Bans campaign and trained campaign spokespeople representing school, college, and public libraries
 - Submitted advocacy-related blog posts, social media, and other content to ALA division communications
 - Co-sponsored a webinar on the [HHS vaccine information campaign We Can Do This](#)
 - PPA and PLA co-sponsored a webinar, [Gearing Up for the Digital Equity Act with Libraries](#), with the National Skills Coalition in mid-April
- Policies/legislation promoting equitable library services:
 - March 31 [Coalition letters to Congressional leaders regarding public access to research in the U.S. Innovation and Competition Act, S. 1260](#)
 - April 5 [Letter to House Oversight Committee Opposing Book Bans and Challenges to Free Speech](#)
 - April 26 [Letter to RI Legislature supporting S 2842 to protect library & patron access to eBooks](#)

- February 4: [Filing to Leverage Libraries to Achieve Historic Progress Towards Digital Equity for All](#): Submission to the National Telecommunications and Information Administration, U.S. Department of Commerce
- April 27 [Comments filed with the FCC Promoting Fair and Open Competitive Bidding in the E-Rate Program](#)
- May 18 [Comments filed with Department of Energy](#) urging use of IIJA funds to support investments in school library facility sustainable energy infrastructure
- May 24 [Testimony ALA Deputy Director of Policy and Government Relations Gavin Baker](#) Regarding the Library of Congress and the Government Publishing Office Before the Senate Committee on Appropriations Subcommittee on the Legislative Branch

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

- Library Funding: The launch of the annual House Dear Appropriator letter campaign started on a tragic note with the sudden passing of Rep. Don Young (R-AK), a House Republican library champion and longtime co-lead on both the LSTA and IAL letters. With less than a week to act, PPA staff identified two Republican offices willing to pick up the work begun by Rep. Young. Rep. Peter Meijer (R-MI) agreed to join Rep. Raul Grijavla (D-AZ) as leads on the LSTA letter. Rep. Meijer and Rep. Don Bacon (R-NE) agreed to join Reps. Eddie Bernice Johnson (D-TX) and Jim McGovern (D-MA) as leads on the House IAL letters. ALA member advocates responded quickly to our calls to action to deliver the message that Representatives should sign the LSTA and IAL letters. The LSTA letter received 100 signatures (nearly matching last year) while the IAL letter ended with 85 signatures (a slight drop from last year). The Senate Dear Appropriator campaign allowed for an additional few weeks to secure signatures. The LSTA letter was led again by Senators Jack Reed (D-RI) and Susan Collins (R-ME) and ended with 47 signatures matching last year. The IAL letter was again led by Senators Reed and Debbie Stabenow (D-MI) and ended with 36 signatures, two more than last year.
- ALA included a new funding request of Congress for FY 2023 to allocate at least \$20 million for new funding for improving library facilities. Current funding under LSTA does not support renovation or construction of library buildings. However, many libraries, particularly in rural and underserved communities, have significant facilities needs, including outdated and undersized library buildings, health and safety issues, accessibility barriers, and needed structural repairs. Nationwide, public libraries need an estimated \$32 billion for renovation and construction. PPA staff continues to urge congressional appropriators to provide new funding to begin to address this significant need, following the groundwork for the [Build America's Libraries Act](#).
- PPA continues to [encourage library workers](#) with federal student loans to review their eligibility under the U.S. Department of Education's Public Service Loan Forgiveness (PSLF) program. Library workers in all contexts—school, public, academic and others—with federal student loans may be eligible for the waiver. PPA is promoting [a web page of resources](#) for library workers and a [webinar series](#) ALA sponsored as part of the PSLF Coalition.
- Banned books: see separate report on collaboration with OIF and CMO on the uptick in banned books and supporting library staff facing threats
- The ALA Editions book, [Libraries That Build Business: Advancing Small Business and Entrepreneurship in Public Libraries](#) was released in May 2022. It was edited by Megan Janicki with support from the PPA Office and in collaboration with ALA Editions, the LBB cohort and a number of other contributors. The book features all of the LBB libraries, as well as a collection of other libraries offering business support from around the country.

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

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

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

- ALA members and leaders, reached via email and on ALA Connect
- Scores of posts on PPA (@LibraryPolicy), ALA and ALA division (incl. AASL, ACRL, PLA, UFL, ILL) social media accounts and blogs
- House and Senate members and/or staff from offices on Capitol Hill, including those at a federal budget briefing before Congress on May 25, when PPA arranged for Patience Frederiksen, director of Alaska Division of Libraries, Archives, and Museums, to speak.
- Library associations of states involved in state e-books legislative campaigns, censorship battles and adverse legislation, including in Colorado, Illinois, Louisiana, Maine, New Hampshire, Tennessee, and Virginia
- Library trade press and other media via press releases and direct outreach
- Viewers of two Instagram Live “Connectivity Corner” conversations with ALA President Patty Wong on how libraries are innovating to close the digital divide and keep communities connected:
 - March 30: Filtering and information access with Dr. Emily Knox, University of Illinois, and Dr. Shannon Oltmann, University of Kentucky
 - May 23: Community partnerships with Michael Bradley, Eugene (Ore.) Public Library
- Participants at events where PPA staff spoke, including:
 - PLA Conference
 - [Conference session on library digital content](#) at Computers in Libraries 2022
 - Nebraska Library Association legislative day
 - Ohio State Library “Critical Conversations” series webinar
 - Maine Library Association legislative day
 - United for Libraries’ *Learning Live* event
 - Maryland Library Association/Delaware Library Association
 - California Library Association’s Ursula Meyer’s Training series
 - New York Library Association’s Spring on the Hill advocacy event
 - University of Maryland’s ALA Lecture Series, which featured Patty Wong and COL Chair Joe Thompson

Describe the Most Impactful Unit Activities this Quarter:

- The FY 2023 #FundLibraries campaign kicked off during National Library Week (April 3-9), which offered a natural opportunity for advocates to connect with elected officials to remind them that libraries make a difference and need funding to continue serving their communities. The [Take Action for Libraries Day](#) web page provided a range of actions advocates could take and tools to use to advocate for federal funding for libraries.
- PPA provided congressional offices with sample social copy, graphics, and story ideas to share during National Library Week. After outreach from PPA staff, more than 80 members of Congress posted on social media at least 100 times, a 339% increase in posts compared to National Library Week 2021.
- On April 6, PPA staff participated in the National League of Cities (NLC) program, “Libraries as Essential Civic Spaces,” along with representatives from the Memphis and Kansas City Public Libraries. The webinar was part of NLC’s [Local Democracy Initiative series](#).
- On April 12, [PPA announced a partnership](#) with the U.S. Department of Health and Human Services’ [“We Can Do This” campaign](#) to share trusted information about COVID-19 vaccines with parents and families with children. PPA sponsored [a free webinar, presented by the Public Library Association](#), on May 25.
- The [2022 ALA Policy Corps](#) cohort held its first in-person training in Washington, D.C., in late April, which included deep dives into the federal appropriations process, new federal funding for digital equity, and state and local censorship attempts and next steps for #UniteAgainstBookBans. Not long after, cohort member Miguel Ruiz’s Washington Post [letter to the editor](#) regarding censorship impacts was published.
- On May 18, the [House passed the Workforce Innovation and Opportunity Act of 2022 \(HR 7309\)](#). The reauthorization bill builds on work ALA did to include libraries in the 2014 WIOA Act. WIOA 2022 explicitly authorizes public libraries to serve as affiliated one-stop sites, recognizing work already happening at the state

and local level in places like Nevada, Oklahoma, and Pennsylvania. This is one of ALA's explicit asks to House committee staff and is a good start.

- In early June, PPA convened dozens of library leaders, policy advocates and inside-the-beltway experts for two days of panels, discussions, and informal conversations, to plan for the library future of digital equity, literacy, and inclusion at the local, state, and national levels. Participants explored past learnings; current digital equity, literacy, and inclusion efforts; and how those experiences might advance the work libraries do in the future.

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

PPA will offer programming at ALA Annual in June.

- ALA is again a premier partner with National Voter Registration Day, which is September 20. Updates to ALA's [voter engagement resources](#), including ALA's voter engagement guide, are being completed by PPA in advance of voting-related programming at ALA annual and the Midterm elections.
- PPA will continue to work closely with OIF to advance the Unite Against Book Bans campaign

PUBLIC PROGRAMS OFFICE

Unit Manager: Melanie Welch

Unit Budget

- FY22 Budgeted revenue and expense: General Fund Admin: \$186,474; Grants: \$1,718,950; Overhead: \$190,807
- Actual revenue and expense to date: General Fund Admin: \$4958 (decreased since last report due to PPP loan apportionment); Grants: \$3,071,707; Overhead: \$117,308

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

Revenue Stream(s) the Unit Supports:

☒ Contributed Revenue

Status Report on Pivot Strategy, Aligned Unit Goals:

PPO continues to see fundraising success and is proud to say we are exceeding unit goals. We have 3 new grant proposals currently being considered by funders, 4 proposals in development and 2 projects described below were recently selected for funding.

PPO signed a five-year, \$598,000 cooperative agreement with the Smithsonian Institution's National Museum of Natural History (NMNH) Human Origins Program to tour a traveling exhibition, Exploring Human Origins, to 12 public libraries and seminaries. The goal of the traveling exhibition and public programs is to create an opportunity for audiences across a wide spectrum —from those who do not question the scientific study of human origins to those who are troubled by its findings — to engage the complex field of human evolution research in ways that are understandable, fulfilling, captivating, and relevant. The exhibition previously toured to public libraries in 2015-2017.

In collaboration with the American Anthropological Association, PPO will be touring their World on the Move traveling exhibition and is planning two programs about it at ALA Annual Conference. The first will be an informational session about the exhibit themes of human migration, presented by project scholars and staff. The second will be an offsite evening event, where conference attendees can see the exhibit on display at the DC Public Library and learn more about related programming and the application opening in the fall.

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

- PPO continues to hear from programming librarians and staff about local COVID impacts on in-person programming. Due to shifts over the past two years in programming, libraries are still balancing virtual, hybrid and in-person offerings. Planning is more short term due to the rapidly shifting needs of the community. Take-home programming kits and passive programs are time consuming for library staff, who are feeling a little “over it.” PPO is adapting quickly to serve the profession’s needs.
- PPO sees intellectual freedom concerns impacting the selection of program topics and staff are hearing from librarians who are anticipating how community members will react to certain programming themes. Staff are prepared to support libraries and work with OIF if challenges to PPO-funded projects arise.
- PPO has been hearing a rising call from the field for resources related to mental health and trauma. As communities continue to struggle under the weight of local, national, and global crises, library workers have seen a rise in need/demand for mental health resources to help both community members and their staff deal with trauma. A recent [Programming Librarian article shared needed and requested de-escalation resources](#) to assist librarians with hurting or challenging library users.

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

- American Rescue Plan (ARP) project: 200 grant recipients received their \$10,000 awards, were engaged in ALA Connect.
- Let’s Talk About It (LTAI): Women’s Suffrage: 25 grant recipients hosted programming in their communities.
- Thinking Money for Kids: 8 libraries hosted the exhibit and conducted related programming for children and families.
- Hybrid Programming Series: 559 people have viewed the first two sessions of the NEH funded free webinar series focused on hybrid library programming.
- Libraries Transforming Communities: Accessible Small and Rural Communities: 10 library workers were selected to participate as project advisors.
- STEAM Equity: 3 partner libraries are currently hosting the traveling exhibits Soy Super, Somos Super Creative, and Soy Super Curious; all 12 partner libraries have also completed family programming with their STEAM Outreach kits.
- NASA@My Library: 60 partner libraries hosted a variety of programs including some focused on the James Webb Space Telescope, Earth Day, moon-viewing with telescopes, and incorporating NASA student Subject Matter Experts presenters.
- ProgrammingLibrarian.org: 62,415 unique users visited the website to access content about library programming.

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

PPO's Programming Librarian website provides resources to help libraries fill their role as centers of lifelong learning and cultural and civic life in their communities. More than 62,000 unique users visited ProgrammingLibrarian.org from March 1 to May 23, viewing more than 168,000 web pages. Recently, PPO has focused on publishing success stories from libraries that received American Rescue Plan: Humanities Grants for Libraries and Libraries Transforming Communities: Focus on Small and Rural Libraries grants. Popular web articles this quarter have included a blog, featuring a Libraries Transforming Communities grant recipient, about reducing the stigma around mental health at the library. Readers were also interested in the hybrid webinar series currently offered by PPO (funded by NEH American Rescue Plan funding) and various program models, such as Mini Library Kits and Skincare of the Ancient World. PPO's popular and active Programming Librarian Facebook group had 24,775 members as of May 23, an increase of nearly 5% since the start of the quarter.

More information on the other projects noted above, such as STEAM Equity and Let's Talk About It (LTAI): Women's Suffrage can be found on the PPO webpage at <https://www.ala.org/aboutala/offices/ppo/>.

Describe the Most Impactful Unit Activities this Quarter:

Melanie Napoleon Welch was promoted to permanent Director of the Public Programs Office. Melanie joined ALA as a Project Director in the Public Programs Office in 2015. She was promoted to Deputy Director, and later took over as interim Director of PPO upon the retirement of Deb Robertson last year. She has nearly 25 years of nonprofit management experience and started her career in environmental education and community engagement after receiving a master's degree in biology. Before joining ALA, Melanie founded the Great Lakes conservation department at the John G. Shedd Aquarium in Chicago and was a member of the 2010 class of Catto Fellows at The Aspen Institute in Washington, DC.

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

- The 25 selected sites for *Let's Talk About It: Women's Suffrage* will continue implementing scholar-led reading and discussion programs using [theme materials](#) until September 2022.
- The *Libraries Transforming Communities: Accessible Small and Rural Communities* grant applications will be created with input from project advisors through the next fiscal quarter. The grant application is scheduled to launch in November 2022.
- Beginning in mid-March the *Great Stories Club: Imagining the Future* will kick off. The first part of the project will be selecting a project scholar, who will choose 3-5 book titles for the theme, and write a thematic essay and engaging discussion questions for each title, to facilitate book discussions with teen readers.

ALA PUBLISHING & MEDIA

Unit Manager: Mary Mackay

Unit Budget:

- Budgeted FY22 Revenue \$9,343,937/ Overhead \$2,476,143/ Total Expenses \$9,162,042/ Net \$181,895
- Actual revenue and expense through January 31: Revenue \$3,599,594 (-6%)/ Expense \$2,935,786 (-19%)

of Staff: 46

Revenue Stream(s) the Unit Supports:

☒ Publishing and Media

Status Report on Pivot Strategy, Aligned Unit Goals:

At the end of April, revenues for the department as a whole were estimated 3% below budget, projected to hold through the end of FY22, and expenses are projected to be 4.5% below budget, for a projected net improvement of \$133,639.

Published content and initiatives support the imperative of increasing EDISJ engagement and amplifying “Let Our Legacy Be Justice.” Examples include recent and forthcoming publications such as *Power Lines*, *Hopeful Visions*, *Practical Actions*, *Narratives of (Dis)Enfranchisement*, and *Narratives of (Dis)Engagement*; trend stories in the May issue of *American Libraries* on [antiracist storytimes](#), [period equity](#), and [accessibility collections](#) for young patrons, as well as a PLA webinar excerpt on boosting [youth workforce preparedness](#) and an interview with challenged book author [Mariko Tamaki](#); the Fight Censorship in your School and Public library panel, a session to be conducted by *Booklist* at Annual Conference; an article by trans author Kyle Lukoff in the June *Booklist Reader*; and an updated two-page summary with an introduction by ODLOS of EDISJ-related titles in the ALA Editions/ALA Neal-Schuman catalog.

Pivot strategy goals are also reflected in the Publishing 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. *Booklist Reader*, the monthly publication (currently digital-only, with print planned to launch in FY23 for wider accessibility) offers selected Booklist content highlighting diverse voices and books to the patron audience. ALA Editions/ALA Neal-Schuman continues to negotiate translation rights for several titles, and to work with trade publisher Sourcebooks to repurpose timely content for a wider audience. RDA: Resource Description and Access continues to address global regional needs and to work with international translation partners, including for Arabic. Building on reaching a general public customer base through the ALA Graphics Giftshop at [spreadshirt.com](#), the PLA designs included conference-branded and non-branded items to be immediately relevant to a wider audience.

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

- The high number of open jobs has led to continued above-budget results for ALA JobLIST, a joint project between *American Libraries* and ACRL, with HRDR. (More staff time is required for processing increased ads.)
- The global shortage of paper pulp and strikes in paper mills continue to disrupt the publishing industry with long delays, sudden price jumps, and substituted grades of paper. These supply-and-demand disruptions are resulting in higher costs and longer-than-usual print times, impacting budget and delivery of magazines, books, and catalogs. Postage rates are also increasing steeply. We continue to adjust print runs and paper and negotiate costs as possible.

- Units continue to focus on licensing opportunities and new channels for generating incremental revenue from digital platforms. Editions/Neal-Schuman received its first royalty check from a new contract with Gale/Cengage that allows people to purchase single chapters and collection content bundles, to build topic collections. The *Booklist* agreement with Zinio, a technology company that hosts digital magazine content on Overdrive, Scribd, Amazon and other services, is already expanding reach and building new audiences for *Booklist*, *Book Links*, and *Booklist Reader*. Zinio metrics are now included in the quarterly *Booklist* data (below).
- There is a clear ongoing need and demand for resources related to EDISJ and to addressing the increase in book bans and challenges. AL Articles highlighting intellectual freedom–related issues include a piece on AmericanLibraries.org about [Tennessee librarians fighting](#) the state’s “obscenity” bill, as well as an upcoming June issue interview with *Maus* author Art Spiegelman and a column from ALA President Patty Wong about ALA’s longstanding fight for the right to read and the Unite Against Book Bans campaign. Q3 top-selling books point right at the issues facing libraries including intellectual freedom, trauma, and race. Special promotions highlighting resources to help counter book bans are examples of Publishing & Media offering information in a timely way.
- A resolution of an Amazon purchase order issue led to more print-on-demand sales in Q3.
- Major publishers (critical sources of revenue for advertising and sponsorship for Booklist) have found creative ways to build their own digital audiences through the pandemic and are less dependent on ALA channels to reach librarians. Face-to-face events are important for offering something they cannot easily replace themselves.
- Q3 began to see slight movement back toward in-person events with increase in requests for coupon codes to the ALA Store to be given to attendees. Small, virtual event orders for particular titles still remained the norm, prepared as single-address drop ship orders. Bulk and special sales of books remain a priority, especially important in light of the common trend toward reduced demand by individuals for professional development books and identifying opportunities to sell more copies of each title is vital. As of May, and as we move away from pandemic restrictions, larger group conferences, workshops, events, and gatherings are returning, and we will capitalize on the need for multiple copies of books.

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

Booklist Q3 FY22

- 7,241 avg. print subscribers (-994 avg from Q2)
- 4,727 avg opens for BOL-hosted digital editions
- 2,802 avg opens for Zinio/Overdrive-hosted digital editions
- 77 institutional digital subscriptions (+6 from Q2)
- 247,300 newsletter subscriptions (top newsletter 95.6K)
- 5,609 active profiles, Booklist Online (-5 from Q2)
- 44,500 Twitter followers (+200 from Q2)
- 16,494 Facebook page follows; 14,955 Facebook page likes (both slightly up from Q2)
- YouTube channel subscribers: 473 (+32 since Q2)
- 839 LinkedIn followers (+88 from Q2)
- 839 LinkedIn followers (+88 from Q2)
- Q3 Podcasts: 1,427 listens for 3 podcasts (both Shelf Care and Shelf Care Interview)
- Q3 webinars: 22,095 registrants for 22 webinars

ALA Editions/ ALA Neal Schuman Q3 FY22

- 2,827 orders (+84 from Q2); 16,776 net units purchased (+4,515 from Q2)

ALA Graphics Q3 FY22

- 57,146 catalogs mailed (-2,854 from Q2)
- 1,455 orders (+111 from Q2); 9,509 net units purchased (+63 from Q2)

ALA Store Q3 FY22

- 169,173 sessions (previously called "visits") +7,609 from Q2
 - Note: Unique sessions stats not available in Google Analytics
- 501,603 unique pageviews (+133,993 from Q2)
- Users typically spend about 2 minutes per visit to the store (about the same as Q2)
- 43.3% of users find the store via organic search; 33.5% of users find the store via direct link; 18.3% of users find the store via referrals from other sites (50% from ala.org); 3.3% of users find the store via social media

Digital Reference/RDA Q3 FY22

- 2,282 Toolkit subscribers (-73 from Q2)
- 8,469 users (- 551 from Q2)
- 23,145 newsletter recipients (+8 from Q2)
- 1,542 RDA-L email subscribers (+15 from Q2)
- 1,532 subscribers to RDA Toolkit YouTube Channel (+49 from Q2)

American Libraries and AL Direct Q3 FY22

- 46,108 recipients AL print (March/April, May) (-307 from Q2)
- 32,336 average recipients weekly AL Direct (+698 from Q2)
- 15,568 podcast listens (FY22 cumulative = 43,590)
- 97,059 Twitter followers (-204 from Q2); 17,703 Facebook page followers (+59 from Q2)

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

The magazines—*Booklist* and *American Libraries*—have more measurable direct engagement than products such as books, posters etc. One of our clearest measures of member/ non-member activity and engagement would be percentage of transactions with member discounts. A high percentage of our sales do not have linked member information because they go through distributors (Amazon, Baker & Taylor, EBSCO, etc.) that use proprietary ordering systems and don't share customer data. Some orders are placed by accounting/ administrative departments of institutions that may be ordering for members but don't use member numbers to apply for discounts. Webinar attendance for sponsored webinars (Booklist and AL Live) remains strong. One pressing concern related to engagement is to ensure that we maximize the number of people buying each book or other product we publish, and that the right audiences are receiving pertinent information at the appropriate time to make purchasing decisions.

Describe the Most Impactful Unit Activities this Quarter:

ALA Editions/ALA Neal-Schuman Q3

- Published a total of 7 book projects. The cumulative total of books planned for FY22 is 46, plus 12-14 Facet titles.
- The Spring/Summer 2022 catalog, which included an updated EDISJ spread, mailed in early March to approximately 51,000 people.
- The Spring 50% off Sale on 400+ products ran April 12-June 3 and generated close to \$24,000 as of May 25.

- The second edition of best-seller *The Weeding Handbook* by Rebecca Vnuk was published, and backorders released, in May 2022.
- Negotiations for several translations are underway with a Korean translation of *32 Virtual, Augmented, and Mixed Reality Programs for Libraries* signed in April.
- A 17-month planner of ALA recommended reads was released in April and has been selling well, including a day at #1 on Amazon's calendar wish list. An ALA/Sourcebooks Banned Books journal will be released in FY23 Q1.
- Jeanie Austin, author of *Library Services and Incarceration: Recognizing Barriers, Strengthening Access*, delivered the Augusta Baker lecture on April 22, 2022, focusing on the re-thinking of the relationship between carceral settings, libraries, and restorative justice.
- Interviews were conducted with Jeanie Austin for their book *Library Services and Incarceration*, Belinha De Abreu for her book *Media Literacy for Justice*, and Michael Cart for his fourth edition of *Young Adult Literature*. These interviews are routinely shared in multiple channels.
- Integration with the Chicago Distribution Center is mostly complete. The team continues to work with IT on the shopping cart integration, due to be completed by mid-June. eBook sales and fulfillment in FY23 will be more streamlined as ALA joins CDC's BiblioVault system. We expect to lose less revenue to aggregator fees by taking advantage of CDC's revenue-sharing agreements.

Booklist Q3

- Booklist's recent agreement with Zinio, a technology company that hosts digital magazine content on Overdrive, Scribd, Amazon and other services, is already showing progress in reaching new audiences and extending the exposure and reach of *Booklist*, *Book Links*, and *Booklist Reader*.
- *Booklist* is planning several Annual Conference events including a Fight Censorship in Your School and Public Library Panel, a Booklist and LibraryReads Read & Rave, two graphic novels panels, the Annual Carnegie Medals For Excellence in Fiction and Nonfiction event, two sessions with United for Libraries moderated by *Booklist* Board Members and is collaborating on the Odyssey and Printz awards. *Booklist* also featured an article by trans author Kyle Lukoff and will conduct a book signing at the *Booklist* booth.
- A print version of *Booklist Reader* was mailed with the June issue of *Booklist*, which is the Annual Conference issue. *Booklist* is developing pricing and marketing plans for Booklist Reader in print, which will launch in FY23.
- Advertising revenues remain strong through Q3 and will likely end the year above budget; however, subscriptions continue to face industry pressure and slipped in Q3. Focus on expanding audiences and reaching library patrons will hopefully boost subscriptions in FY23.

American Libraries Q3

- Classified ad revenue for JobLIST, managed in collaboration with ACRL, brought in almost \$145,500/unit in sales in Q3. Total receipts for the first three quarters of FY22 are \$734,907—106% greater than last year. With three months of receipts still to come, JobLIST has already exceeded its entire budget for the year (\$680,000), achieving its fourth best year overall out of its 16-year history.
- The May issue of *American Libraries* featured the annual [Library Systems Report](#), which details the library technology industry and remains popular among readers after eight years. Published a special report "[Toward an Equitable Digital Future](#)" in the March/April issue.
- Posted an online story about [Tennessee librarians fighting](#) the state's "obscenity" bill.
- Collaborated with CMO to promote National Library Week activities, including its [State of America's Libraries report](#) and news of the ALA-commissioned [poll on book bans](#).
- Covered PLA's conference with [daily blog posts](#).
- Posted [ALA election results](#) in collaboration with Governance and CMO.

- Published a Letters of the Law [column about ebook laws](#).
- Worked with [PPAO on a blog post](#) about library funding in the federal budget and the #FundLibraries advocacy campaign.
- Interviewed members of ALA's Philanthropic Advisory Group for a *Call Number with American Libraries* [podcast episode](#) on Financial Literacy Month in April.

Digital Reference/RDA Q3

- Salesforce-reported revenue through April is \$723,581, less than 1% short of budget projections, and roughly \$15,000 ahead of the previous year's pace. The growth in revenue is largely due to price increases, and DR will be investigating and addressing recent declines in subscribers and user numbers as documented in Q2 and Q3.
- Free monthly webinars in Q3 included a presentation on application profiles, an update forum by the North American RDA Committee, and an ask-us-anything event with a panel of RDA Steering Committee members. The popular RDA Lab Series began a third run in April.
- Work continued on the new administrative site for RDA Toolkit subscribers, and it is expected to be available in June.
- A March release of RDA Toolkit revealed some gaps in the production process related to the recent site migration that have now been addressed.
- Accounting and Digital Reference are working together on RDA Fund and other reporting practices for RDA: Resource Description and Access.

ALA Graphics Q3

- The Spring/Summer 2022 catalog mailed featuring:
 - New Banned Books Week 2022 event materials including a poster, bookmarks, stickers, and bracelets
 - New 2022 Library Card Sign-up Month poster and bookmark featuring Loud Mouse and announcement of honorary chairs Cara Mentzel and Idina Menzel in partnership with CMO
 - New Copyright poster and bookmark written by former ALA staffer and copyright expert, Carrie Russell
- Added two new partners—Gaming Round Table and Unite Against Books Bans—to Spreadshirt virtual shop. Between new and existing partners, debuted 42 new designs across 186 products. "Connect with your library" was the top-selling design in Q3, with "Keep libraries weird" a close contender!
- Licensed Baby Yoda READ® library card art to 6 new libraries including 25,000-card order for Ocean County Library in NJ.
- Launched a [LeVar Burton READ t-shirt](#) with licensing partner Out of Print.
- Marked down more than 100 items on ALA Store for the spring sale running April 12-June 3.

Select Future Activities and Events Through End of FY22, Q4:

- Books published in Q4 will include *Power Lines*, *Narratives of (Dis)Enfranchisement*, *Narratives of (Dis)Engagement*, *Cultural Humility*, and *Fostering Wellness in the Workplace*. We expect to see fall semester sales from several of our best-selling textbooks including *Metadata* (3e), *Young Adult Literature* (4e), and *Metadata for Digital Collections* (2e). Two large bulk orders, including one with the military, will be processed in Q4. Chicago Distribution Center shopping cart integration will be complete at the start of Q4, creating efficiencies and opportunities particularly with the digital BiblioVault.
- *Booklist* continues to investigate digital options for greater reach and incremental revenue. *Booklist Reader*, launched as a digital product in September, will be shared in print at Annual Conference, and offers opportunities to experiment in reaching the reading public with ALA content. Based on a survey conducted by *Booklist* staff, public libraries are interested in bulk print copies of *Booklist Reader* for library patrons.

- All units are planning their return to in-person events and presence at Annual Conference. To cut expenses, ALA Editions/ALA Neal-Schuman and ALA Graphics will have a more modest store on the exhibit floor and will bring less stock, offering incentives for attendees to place orders onsite and have items shipped. The *American Libraries* team will resume in-person coverage of Annual Conference on both The Scoop blog and in the Daily Scoop conference e-newsletter.
- ALA Graphics will debut 3 new READ posters at Annual Conference: singer and actress Idina Menzel; Senegalese basketball star, Tacko Fall; and viral sensation (and soon-to-be movie star), Marcel the Shell with Shoes On. The fall 2022 catalog, which will feature these and other new items, will mail August 4.
- The June issue of *American Libraries* includes articles about Annual Conference (cover story), 100 years of the Newbery Medal, an interview with challenged book author Art Spiegelman, and stories about the Great Resignation and library jobs on the rise. The June episode of *Call Number with American Libraries* will focus on Washington, D.C., and will include an interview with Librarian of Congress Carla Hayden. The July/August issue will include a conference wrap-up, a feature on ALA Presidential Citations award recipients, and an interview with author and Annual Conference auditorium speaker Celeste Ng. The September/October issue will have a short feature highlighting several examples of book challenges and counterresponses, as well as recurring features on the ALA Awards and library design.

REFERENCE AND USER SERVICES ASSOCIATION (RUSA)

Unit Manager: Bill Ladewski

Unit Budget:

- Budgeted revenue and expense: Revenue \$314,250 / Expense \$308,475
- Actual revenue and expense: Jan 22 – Revenue \$136,287 / Expense \$40,130

of Staff: 1.8 (One full-time staff member and one staff member who divides time between RUSA and YALSA)

Revenue Stream(s) the Unit Supports:

☒ Continuing Education

☒ Membership

Status Report on Pivot Strategy, Aligned Unit Goals:

Goal 1 - Increase RUSA Membership by 1% per year by rebranding RUSA to increase the visibility of its work, targeted outreach to non-members, focused recruitment and retention measures, ongoing member engagement efforts, and student membership campaign in FY22.

With the most recent membership numbers provided through December, RUSA had 2,570 members. This represents an increase of 22 members so far in this current membership year (July-June), or .8% growth. RUSA Section membership has also increased for each Section so far in this membership year. The largest membership growth has occurred in RUSA Sections CODES and STARS, each having increased over 4% so far this membership year.

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

Through May, RUSA's completed CE programs have consisted of 10 e-courses and 8 webinars, with total combined attendance of over 500 participants. Financially through January, RUSA's CE revenue totaled \$47,650 against a budget of \$42,000 which represented a 13% positive variance to budget.

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

- RUSA at Annual Conference: Staff is mostly focused now on preparation for the 2022 Annual Conference. RUSA is sponsoring 20 programs at Annual. Highlights include our Literary Taste Program, RUSA President's Program, ETS Showcase, and New Discoveries in Reference.
- Annual Committee Appointments: The majority of committee appointments for RUSA occur during the third quarter. Between RUSA and Section committees, there are over 100 committee to appoint volunteers to. The RUSA office supports the committee chairs during this process and helps when any issues with the appointment database occur.
- RUSA staffing: RUSA is adjusting to its current staffing level of 1.8 FTE's. Last year RUSA's staffing level was 2.8 FTE's. The year prior it was 3.1 FTE's. With this reduction in RUSA's staffing level, we are monitoring the limits of what is the realistic workload capacity. Stressing RUSA's staffing level during 3Q was the support that was necessary to fulfill the obligations of our Achievement Award programs. Currently RUSA's Award Coordinating Committee is working to simplify managing the logistics of the awards so that more responsibility is managed by award committees rather than by staff.

of Members: 2,570 as of December 2021

of Members/non-members/other stakeholders reached during quarter: Approximately 40,000 through association wide promotion of our Continuing Education programs.

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 December reporting numbers, has shown a growth in membership of 22 members so far this membership year.

- RUSA Continuing Education: Through the 3Q of FY22, RUSA CE has presented 10 courses and 8 webinars totaling over 500 participants. Additional confirmed upcoming CE programming consist of 5 e-courses and 4 webinars. As of the January financial figures, RUSA CE is ahead of its budget expectations by 13%.
- RUSA Virtual Forum: Continuing the theme of education, RUSA's first ever Virtual Forum was held on March 8 & 10 and had a total attendance of over 120. RUSA was very excited with the success of our first try at a stand-alone RUSA educational program that we have decided to hold a Virtual Forum program again next year.

Describe the Most Impactful Unit Activities this Quarter:

- RUSA Virtual Forum: RUSA was excited to host its first-ever Virtual Forum on March 8 & 10, 2022. The Forum Theme was: **Reference and User Services Re-engaged** What have we learned? What ideas will we keep? How can we prepare for future disruptions? Which patrons did we serve well and where can we improve to serve all patrons?

The purpose of the Virtual Forum was to showcase the work of our sections and interest groups. The **Opening Keynote Session was “Using Equity, Diversity, and Inclusion (EDI) to provide Reference and User Services.”** ALA Executive Director Tracie Hall led a moderated Q&A with ALA leaders to discuss the role of EDI in their organizations. We heard directly from **Julius Jefferson Jr., Immediate Past President**, American Library Association and **Patty Wong, President**, American Library Association share their perspectives of EDI and how it applies to reference and user services.

The Closing Session was “Incorporating Race-Centered and Trauma-Informed Practices into the Reference Interview.” We heard directly from chapter authors, Emma Antobam-Ntekudzi and Nicole Williams, of the forthcoming ACRL Book *The Community College Library: Reference and Instruction*. The speakers showed the significance of raising race consciousness and integrating this awareness into everyday reference interactions with students in the library. Speakers also provided effective methods of engagement such as incorporating trauma-informed practices in order to create an inclusive and safe experience for students in the library.

Additional topics included: Public Libraries and Academic Libraries working together to transform Communities with business resources; Keepers from Covid: Assessing services for the long haul; Updating RUSA's Guidelines for Behavioral Performance of Reference and Information Services Providers; mPowerment through information: Building financial literacy confidence and expertise for library professionals; Health Reference: Introduction to Ethics and Best Practices; Establishing a Mentoring Program, and Through the Pandemic and Beyond: Still Reaching First-Year Students Wherever They Are

- RUSA 2022 Achievement Awards: **The [RUSA Achievement Awards](#) winners were announced in March. There were a total of 17 Achievement Awards presented.** RUSA's Achievement Awards Program honors the best in reference librarianship and its many specialties. These awards recognize and honor the outstanding professional contributions and achievements of RUSA members. This special recognition by RUSA enhances the sense of personal growth and accomplishment of our members, provides our membership with role models, and strengthens the image of our membership in the eyes of employers, leadership, and the librarianship community.
- RUSA 2022 Election Results: RUSA elected a president-elect and Secretary in the 2022 election. The RUSA Sections also elected 18 different individuals to fill leadership roles within the Sections. Congratulation to all the election winners and to all who stood for election in 2022.

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

- RUSA at Annual Conference: RUSA will be very active at the upcoming ALA Annual Conference. In addition to governance meetings, RUSA will be hosting programs ranging from educational pre-conferences to award programs to a first ever Trivia Championship with co-hosts NMRT and GameRT. RUSA's pre-conference program, *“Connect to Family History at America's Library: A Day at the Library of Congress”* has sold out with 100 attendees.
- RUSA Virtual Achievement Awards Ceremony: RUSA will acknowledge the 2022 Achievement Award winners during our virtual award ceremony on Thursday July 21st. Like our virtual ceremony last year, award winners will

be announced and have an opportunity to speak and express thanks. The virtual ceremony is free to attend for both RUSA members and non-members.

UNITED FOR LIBRARIES

Unit Manager: Beth Nawalinski

Unit Budget:

- FY22 Budgeted revenue and expense (as of January 31, 2022):
 - Revenue: \$109,652
 - Expense: \$160,004
- FY22 Actual revenue and expense (as of January 31, 2022):
 - Revenue: \$109,258
 - Expense: \$102,103

of Staff: 2.8 FTE (.8 currently open)

Revenue Stream(s) the Unit Supports:

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

Status Report on Pivot Strategy, Aligned Unit Goals :

FY22-23 Goal 1: Reconfigure "group members" to align with ALA membership structure; create clear delineation between membership and state library purchase of training and implement communication and marketing plan in FY22.

At its May 6, 2022, meeting, the United board approved the following bold changes to fast-track conversion of current self-join groups to personal ALA/United membership:

- Immediately cease accepting new group members as of May 6, 2022.
- Conversion of self-join groups to begin with November 2022 expirations.

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

- Goal completed in fourth quarter of FY21 with more than \$26,000 in revenue (registration and sponsorship).
- The third annual virtual event is scheduled for August 9-11, 2022.
- As of May 31, 2022, five of United's current statewide partners have opted in for a new 2022 add-on option for statewide registration for this event.

FY22-23 Goal 3: Increase registration and revenue for United for Libraries training/eLearning.

- Statewide All Access Partners: MA, MD, MI, MT, ND, NE, NH, OR, SC, SD, TX, VA
- Statewide Training (varies by state): AK, AL, IL, NJ
- States in Discussion/Procurement: AR, CT, FL, MS, WI

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

United for Libraries Board/Governance Updates

- United members passed several bylaws updates as part of the spring 2022 election, including:
 - Change term of president from one year to two years.
 - Gordon Baker will serve as president from 2022-2024
 - Deborah Doyle will serve as president from 2024-2026.
- During its May 6 meeting, the United board passed the following:
 - Sunset self-join group members, which includes the following:
 - Immediately cease accepting new group members as of May 6, 2022.
 - Conversion of self-join groups to begin with November 2022 expirations.
 - Increase personal membership rate for FY23:
 - Regular: increase from \$55 to \$70
 - Trustee/Friend/Associate: increase from \$55 to \$60
 - Retired: increase from \$55 to \$60
 - Student: increase from \$20 to \$25
 - All Other: increase from \$55 to \$60
 - Increase organizational membership rate for FY23:
 - Public Libraries, all sizes - \$150

United for Libraries Intellectual Freedom Task Force

In the third quarter, the Task Force, with support from United staff:

Released two (2) new resource guides related to intellectual freedom:

- [Challenges to Materials and Programs: The Role of Library Trustees & Board Members](#) (March 31, 22)
- [Challenges to Materials and Programs: The Role of the Friends of the Library](#) (April 12, 22)

Hosted FREE webinar for boards: Keeping Governance on Track

- March 29, 2022: Part 1: How to Be Prepared & Handle Problems
- March 31, 2022: Part 2: The Mock Board Meeting
- Featured professional parliamentarian [Nancy Sylvester](#)
- Supported by a bequest from the late Jack Neal
- This [course](#) is free and open to all libraries and boards.

First Amendment Audits: What Your Library Board and Staff Need to Know

- Live webinar presented on May 11, 2022, by United for Libraries and the ALA Office for Intellectual Freedom (OIF) featuring Deborah Caldwell Stone, Director of ALA's Office for Intellectual Freedom and Executive Director of the Freedom to Read Foundation, and Lori Fisher, Assistant State Librarian for New Hampshire.
- FREE for Intellectual Freedom Roundtable (IFRT) members
 - As of registration launch on March 31, 2022, IFRT had 1,331 members. As of the live webinar date on May 11, 2022, membership had increased by 127 members, for a total of 1,458 IFRT members.
- FREE for United statewide partners in MD, MA, MI, MT, NE, NH, ND, OR, SC, SD, TX, VA
- While the goal of this webinar was focused on value proposition for IFRT membership and United statewide partners, net revenue for the live webinar is approximately \$4,000, with 50% to United and 50% to OIF. Additional revenue is expected from on-demand registration.

FREE Pre-Conference Scheduled for ALA Annual

The ABC's of Preserving Intellectual Freedom - Anticipating, Bridging and Conversing: How to Help Protect Your Library
Friday, June 24, 2022, 1:00-4:00 pm | Washington Convention Center, 207B

The pre-conference and related expenses are supported by a bequest from the late Jack Neal.

[Details & Registration](#)

Speakers:

Robyn L. Stein, President, Robyn L. Stein Group (RLSG)

Cara Taback, Founder/President Cantata Communications

This workshop will help library Trustees, Friends, and Foundations to develop a framework of responses to intellectual freedom challenges. Topics include becoming familiar with varying viewpoints, working with your library to customize responses to difficult questions and situations, and educating the public. The workshop will include discussion about your past experiences, as well as interactive exercises that simulate scenarios library Trustees/Friends/Foundations might face in the future. Following the workshop, the trainers and United for Libraries will provide access to a toolkit of resources to help you and your library be prepared to speak with one voice on intellectual freedom concerns.

of Members (for Divisions): 4,293 (as of January 31, 2022)

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

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

3rd Quarter United for Libraries Learning Live (monthly members only webinars):

- March 8, 2022: Roundtable Discussions: Library Board and Trustees
- March 15, 2022: Roundtable Discussions: Friends, Foundations, and Fundraising
- April 12, 2022: Unite Against Book Bans (partnered with PPA/OIF on new campaign)
- May 10, 2022: Libraries Build Business: Support from Boards, Friends, and Foundations (partnered with PPA)

Statewide Partnerships

Through our statewide training partnerships, United connects with libraries in the following states: AK, AL, IL, MA, MD, MI, MT, ND, NE, NH, NJ, OR, SC, SD, TX, and VA. This includes all library directors/staff, Trustees/board members, Friends Groups, and Foundations in those states associated with 5,697 outlets as defined in the 2019 PLDS. United connects

with these individuals through our eNewsletter (20,000+ individuals), social media, our new blog, the United website, and listservs hosted by each of our statewide partners.

Speaking Engagements

United Immediate Past President David Paige presented the [New Hampshire Library Trustees Association](#) conference keynote on May 10, 2022 and was a panelist for an intellectual freedom webinar for New Jersey libraries on March 22, 2022.

United Executive Director Beth Nawalinski and United Board Member Peter Pearson presented a pre-conference at the [Florida Library Association Conference](#) on Sunday, May 22, 2022, and facilitated a roundtable discussion breakfast on Monday, May 23, 2022.

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

United for Libraries Learning Live: [Learning Live](#), previously a members' only monthly webinar series, will offer additional registration options beginning September 2022:

- United personal members will continue to receive free registration for live and on-demand access.
- Some United statewide partners receive free registration for live attendance and 30 days of on-demand access.
- Individual registration will be available by calendar year, which includes eleven webinars for live and on-demand access.
- Select webinars will be available for registration for on-demand access only.

2022 ALA Annual Conference

United for Libraries will host the following at the [2022 ALA Annual Conference](#):

- Free Pre-Conference (1)
- Ticketed Events (2)
- Author Panels (4)
- United President's Program (1)
- Educational Programs (10)
- Discussion Groups (2)

2022 United for Libraries Virtual: Trustees, Friends, Foundations

Now in its third year, this [interactive three-day virtual event](#), to be held August 9-11, 2022, will feature expert speakers on current topics facing library Trustees, Friends, Foundations, and staff who work with them.

- Confirmed Sessions (full schedule available June 13, 2022):
 - Library Workers are NOT Okay: How Trustees Can Support the Health & Well-Being of Library Staff
 - Diversity Training That Generates Real Change: Inclusive Approaches That Benefit Individuals, Business, and Society
 - Diversity in Library Boards, Friend Groups, and Foundations: Successes and Struggles in Recruiting and Retaining Diverse Members
 - Successful Bequest Fundraising: Planned Giving Lessons From the Field

- Tweeting to Congress: Library Social Media Advocacy
- Registration
 - Early-Bird: June 13-July 8, 2022
 - Regular: July 9, 2022, or after
- As of May 31, 2022, the following statewide partners have purchased statewide registration for this event:
 - Montana
 - Nebraska
 - New Hampshire
 - Oregon
 - Virginia

YOUNG ADULT LIBRARY SERVICES ASSOCIATION (YALSA)

Unit Manager: LaMoya N. Burks (Interim)

Unit Budget:

- Budgeted revenue and expense \$634,438 (year to date)
- Actual revenue and expense \$268,710 (year to date)

of Staff:

2 full time staff members; and 1 one subcontractor; Split funded Staff Across Units = 2 staff members at 20%, 1 staff member at 12.75% (25% Publishing & Media)

Revenue Stream(s) the Unit Supports:

☒ Contributed Revenue

☒ Membership

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

Membership numbers and engagement. Planning and meetings are occurring consistently to address membership needs and trends and to create continuous improvement in member engagement efforts. YALSA Staff and Board of Directors are working collectively to use the pivot strategy to drive implementation of survey results, marketing strategies, membership continuing education opportunities, and meeting/convening priorities.

Cross divisional and departmental meetings have led to addressing gaps in member communication, membership recruitment and retention, and branding. Despite its current staffing constraints, YALSA is taking time to review and

present communication strategies. There is an opportunity to consider adding a communications specialist to support social media and web-based communications and professional development.

YALSA is presently working to review, introduce, and implement best practices for Bylaws, Roberts Rules of Order, policy and procedure, staff duties and responsibilities as well as working closely with both IT leadership, Finance, Development, and Human Resources leadership to bring operations into alignment and to achieve maximum effectiveness. Currently, cross training opportunities for the YALSA staff have proven successful through progress in technology driven tasks, conference planning, and even group think opportunities to drive the future of the unit. YALSA’s leadership is using the pivot strategy to establish common goals and to aid in building a sense of unity around common goals. This unity in focus is helping to foster the relationship building necessary for successful; staff to Board engagement. Future efforts include revitalizing YALSA’s website to better support membership, navigation of YALSA’s offerings and overall user experience. YALSA is also working to expand our Continuing Education options and to increase participation by directly addressing member needs through YALSA’s focus areas and by strengthening revenue. This effort includes teambuilding with both the ALA Membership and Continuing Education departments. We gave targeted mid -August as a starting point to present a cost driven YALSA Continuing Education session made possible through ALA’s Continuing Education Departments platform.

of Members (for Divisions): 3,440 members

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

Statistics Monthly Report for November, 2021 - YALSA Total number membership **November 2021**

<i>2021</i>	<i>2020</i>	<i>Percent of Change</i>
3,498	3,681	-4.97%

To date June 6, 2022 **unofficial numbers** are 3440; May 2022 **official** membership number for YALSA was 3413
Membership increase on average between February 2022 – present June 2022 is approximately 50 members monthly.

YALSA has strategically sent correspondence to invite its membership to consider renewing. In the month of May 2022 all lapsed YALSA members received a postcard. The YALSA Board Welcome committee lead our unit to draft and electronically send out revised welcome letters with resource links to all new members.

Daily interaction to encourage potential committee members to get involved, along with intentional relationship development, strategic social media presence, focus groups, membership meetings, and conference attendance all contribute to the growth of YALSA. We aim to increase numbers by working collaboratively together as a team internally to influence our stakeholders and to support our Board members, and communities to do the same and even better.

Continuing Education statistics:

Date	Webinar Name	Registrants	Attendees	Archive Views (as of 4.1.22)	Total Interactions
12-May-22	Beyond the Plexi Glass	15	10	1	26
14-Apr-22	Utilizing Edelweiss Tools to their Potential	26	13	5	44
10-Mar-22	Rebuilding Teen Social Capital through Programming	57	35	62	154
9-Mar-22	Snack & Chat - Rebuilding Teen Social Capital through a Pandemic	135	57	26	218
10-Feb-22	How to Make Poetry Exciting and Relevant for Teens On-Demand	25	13	16	54
13-Jan-21	Planning an Engaging and Impactful Earth Day Program	47	21	33	101
December, 9 2021	Modern Arab Literature and The Western Audience	19	9	36	64
November,	A Sleuth at Work: How seeking answers and unearthing	23	6	29	58

Email Marketing Stats:

April 2022

Date	Sent	Delivered	Opened	Clicked
4/6/2022		2267 2259 (99.6%)	1114 (49.1%)	51 (4.6%)
4/13/2022		2262 2253 (99.6%)	699 (30.9%)	102 (14.6%)
4/20/2022		2261 2252 (99.6%)	703 (31.1%)	92 (13.1%)
4/27/2022		2260 2251 (99.6%)	671 (29.7%)	53 (7.9%)
Average		2253.75 (96.6%)	796.75 (35.2%)	74.5 (10.5%)

Symposium

To date we do not have any registrations for the Symposium. Registration is slated to go live mid-June 2022.

Describe the most impactful Unit Activities this Quarter:

- Hosted the first YALSA Membership meeting – planned to be quarterly
- YALSA Board representation presented with the National Library of Children & Young Adults in Korea virtually alongside International Relations (Michael Dowling)
- We now have a total of 4 Endowments – LUM endowment was presented at the ALA Trustees Meeting May 2022
- The IMLS T3 Grant will continue with a deadline of March 2023. Trainers and Trainees are making plans to assemble for a learning opportunity at Symposium November 2023 in Baltimore, Maryland.
- YALSA representation traveled for Symposium 2023 Site Visits to Minnesota and St Louis. A decision will be made in the near future.
- Teens Top Ten nominees were announced April 8, 2022 through press release via the YALSA web page.

Have we had during this Quarter any meetings or gatherings for membership to track the number of members and nonmembers in attendance?

The YALSA Membership Meeting resulted in 34 registered, 24 in attendance. The meeting was recorded and placed on YALSA platforms and sent through member email.

Future Activities and Events through the end of Next Fiscal Quarter:

- Cost supported Continuing Education session projected August 2022
- TeenTober advocacy and nationwide video contest in the planning stages with the theme” Love what you do & Do what you love in your library” ; YALSA is currently working with the ALA Store to create merchandise (on demand) for the public to purchase with the theme
- IMLS T3 Train the Trainer grant will convene at 2022 Symposium in Baltimore, Maryland
- Member testimonial videos will be confirmed to place on the YALSA website and other platforms
- An official sponsorship list and levels to present on YALSA website in an effort to extend beyond conference(s)
- YALSA will confirm the Teen Competency Book updates with funding supported by the MAE endowment
- New 4-week e-course scheduled for July - A Place to Belong: Supporting Neurodiversity and Mental Health in Your July 11-August 5
- Attend this 4-week asynchronous e-course to have the knowledge and tools to provide programs that responsibly center mental health and neurodiversity.