ALAAmericanLibraryAssociation

ALA Executive Director's Report to ALA Executive Board
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GENERAL UPDATES AND HIGHLIGHTS

LibLearnX (LLX), ALA's pilot winter convening which debuted in 2022, meets in-person for the first time from January 27-30 in New Orleans. As of this writing, registration is just over 1,500 registrants against a goal of 2,000 paid attendees overall. Featuring a range of authors and cultural icons in its lineup ranging from Ibram X Kendi to Cory Doctorow to Ani DiFranco, LLX is also placing an emphasis on highlighting the work and thought leaders in the LIS field. The President's Program, "Library Workers: Organize and Activate," for instance, will gather such respected practitioners as K.C. Boyd, Lesley Garrett, Candice (Wing-yee) Mack, former ALA Executive-Director Elizabeth Martinez, and co-moderators Lessa Pelayo-Lozada and Emily Drabinski ALA President and President-Elect, respectively on Sunday, June 29th from 8:30-9:45 am.

During LLX 2023, the association will host its first-ever **ALA Governance Institute** scheduled for Friday, January 27 from 8 a.m. to Noon. Intended for current and prospective ALA board, council, or committee members and anyone interested in leadership within or beyond the association, attendees of the ALA Governance Institute (AGI) will have a choice of participating in up to two 90-minute sessions, facilitated by seasoned ALA staff, member leaders, and other subject matter experts. The first installment of this new member-leadership development program will provide insights into critical issues related to effective governance, beginning with a focus on strategic communications and financial analysis and stewardship in workshops available exclusively to LLX registrants. Below are the two in-person sessions available to choose from at the upcoming Institute:

- **Effective Communication for Governance Meetings** (available to ALA Council and Committee leaders and interested LLX registrants)
- **Financial Analysis and Review for ALA Member Leaders** (required for ALA Executive Board Members and available to ALA Council and Committee leaders and interested LLX registrants)

ALA President Lessa Pelayo-Lozada recently said this of the new offering: "I look forward to the inaugural launch of the AGI to prepare future leaders of ALA and libraries as well as bring new insights to those who have held leadership positions in the past."

The AGI reflects ALA's desire to create a stronger mechanism to identify, build, and nurture the next cohorts of ALA and LIS sector leaders. The AGI's launch will be followed by a survey that will allow us to further learn from our members the areas where they seek to grow and develop capacity. Admission to the Governance Institute is free and open to the first 200 LLX registrants who sign up for it. Registration to LLX is open and has had nearly 180 registrants to date.

ALA is also set to pilot a coordinated **Community of Care** program at LLX. As an extension of its Code of Conduct, the desire to establish clearer and more visible care and safety and anti-harassment measures at ALA Conferences has become a priority. Drawing from informed practices emerging from the conference planning and public convening sectors, by creating a Community of Care ALA seeks to support the wellbeing of individuals in group settings by fostering social connections and improving the built environment and through interventions at the

level of physical safety, mental health, and the facilities themselves. In that regard, LLX will seek to have the following elements in place as pilot measures:

- Built Environment: ALA will continue to identify conference programming settings and contexts that require higher security. Code of Conduct signage will feature prominently at the conference communications and new protocols have been put in place that require that vendors/exhibitors/and other conference participants sign the Code of Conduct agreement which applies to their on- and offsite programming activations.
- Social Network: ALA staff and members will wear ribbons that identify them as Community of Care team members able to connect conference attendees to resources and support.
- Mental Health Support: ALA will have a licensed mental health professional onsite and available during all conference hours. As well, a Community of Care Quiet Room will be available on Saturday, Sunday, and Monday for LLX attendees and will be located in Room 276 in the convention center.

Pivot Strategy Update

The new year finds ALA making headway towards key strategic and tactical goals. Though the pandemic caused anticipated declines, **membership is again over the 50,000 mark**. As the full MRS report states, this hard won increase is a welcome indication that new member engagement strategies are yielding the desired results. This slow rebound reflects the impact of the pandemic and associated inflation on individual and institutional budgeting, as two-thirds of ALA members pay their own dues and the remaining third have their dues paid by their organizations. Because member perception of value and benefit is at the heart of their decision-making, ALA has reengaged Avenue M to conduct a survey that will support an update of the membership model. This refresh is timely as ALA's previous membership data is nearly five years old. This analysis includes current ALA members, recently lapsed members, and customers. The results of this survey will be full shared with ALA's decision making bodies.

ALA's **financial management and revenue continue to demonstrate favorable turnaround** as will be shared in BARC and F&A briefings before LLX. Cautious spending and increased centralization of contract and vendor management functions have served ALA well. Increased income from grants and other new business streams are helping to rebuild the association's short-term cash on-hand. To further support this progress is Finance and Accounting's hard but diligent effort to bring ALA's financial reporting current a feat that has now been accomplished two years after an outsourcing initiative was disrupted by the pandemic.

In addition to its main two axis points – membership and revenue growth, the **Pivot Strategy's six impact streams: Conference Services, Continuing Education, Contributed Revenue, Data and Research, Membership, and Publishing continue to provide an organizing framework** for the coordination of work across the association and the amplification of our return on investment and impact.

Programmatic Priorities

Increasing funding to libraries continues to be an ALA priority as multiple units, from PPA to Chapter Relations to the Public Programs and Development Offices and Divisions work to expand legislation and cultivate new grant opportunities to be passed through to libraries nationwide. Last fiscal year ALA was instrumental in shaping policy that resulted in the recognition of libraries as critical infrastructure. As well, the association directly disseminated over $9M to libraries nationwide. This fiscal year, ALA expects to continue to expand funding for libraries and to grow its ability to provide technical assistance in grant seeking to libraries as many do not have deep fundraising capacity or formal development teams. There have been some early conversations about adding grant

development to the ALA Governance Institute curriculum, as well the executive office and United for Libraries have discussed execution of a new newsletter that would help identify and aggregate grants for which libraries are eligible to apply.

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

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

Combatting escalating censorship efforts has been a major priority for the last two years. Last fiscal year, through its Office for Intellectual Freedom, ALA became the first organization in the nation to launch an anti-censorship campaign. To date **Unite Against Book Bans has attracted nearly [90 national and regional partners](#).** UABB featured prominently in OIF's constellation of offerings during Banned Books Week this September. This fall will see more efforts to promote ALA's anti-censorship work and to promote the [UABB toolkit](#) to provide strategies for mobilizing those who want to protect the right to read. As well, the association has worked to redirect funding and secure new funding that will increase its staffing levels. Two new positions have been added and ALA is now in the process of hiring a Deputy Director for OIF and expanding office and project management capacity.

Letter of Concern to FBI Regarding Threats of Violence in Libraries

During the Summer and Fall of 2022, threats directed to public and school libraries and library workers escalated, including the forced temporary closure of five public library systems due to bomb and shooting threats. On September 27, the executive board of the American Library Association (ALA) sent a letter to FBI Director

Christopher Wray expressing concerns about the threats directed to public and school libraries and library workers. The full letter can be found [here](#).

In October, Deborah Caldwell-Stone of OIF and Gavin Baker of PPA spoke with the FBI agent to discuss the letter. The agent indicated that the FBI takes these concerns seriously and asked that they continue to be forwarded as they arise. The agent also informed ALA that an arrest has already been made in one of the cases referenced by our letter. Canadian authorities have arrested an individual living in Canada who is alleged to have made threats against the Salt Lake City Public Library and Boston Public Library. The agent also said that the FBI could provide some training and assistance for members and library workers. That training was recently previewed at a virtual Public Library Association. PLA, in collaboration with the Association for Rural and Small Libraries (ARSL) and the Urban Libraries Council (ULC) cohosted a free virtual town hall titled "Spotlight on Safety: Addressing Threats in Public Libraries" on Wednesday, Nov. 30, 2022.

The panel featured PLA president Maria McCauley, senior counsel to the director for the US Department of Justice Justin Lock, director of the Fort Worth (Texas) Public Library Manya Shorr, library social worker with San Francisco (Calif.) Public Library Leah Esguerra, and director of security at Mid-Continent Public Library (Independence, Mo.) Dustin Koopman.

Some of the resources that have been identified for libraries that may experience threats include.

- [Threat Intimidation Guide](#): provides information about what to do in the event of a threat, including the FBI's national hotline, 800-CALL-FBI.
- [Developing Emergency Operations Plans for Institutions of Higher Education](#): adaptable for libraries
- [Developing Emergency Plans for Houses of Worship](#): adaptable for libraries
- DHS has [resources](#) available to assist with securing public gatherings, including [businesses](#), [houses of worship](#), and [schools](#), and to assist with preventing, protecting against, and responding to [bombs and other explosives](#).

Staffing Updates

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

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

Also in September, **Payal Patel** took on the role of **Communications and Marketing Office Interim Director.** Payal is a strategic communications professional, multilingual media spokesperson and crisis management expert with more than a decade of experience in leading public relations strategies and integrated marketing campaigns. Most recently, Payal spearheaded the communications department and served as the chief spokesperson for Navy Pier, one of the top destinations in the U.S., which welcomes nearly 9 million guests annually. Previously, Payal was the

Public Relations Director for the NFL Players Association - Chicago, where she was instrumental in developing and executing comprehensive communications plans for the 2015 NFL Draft, the charitable arm's high school grant and college scholarship programs, the concussions lawsuit against the NFL, and more. In 2016, she was honored at the National Press Club in Washington D.C. as part of PR NEWS' 30 Under 30 list, celebrating the industry's rising stars.

ODLOS welcomed **Hillary Pearson** as its first ever **Program Manager for Accessibility Services**. Hillary was the Director of Operations and Access Initiatives at the Harris Theater for Music and Dance. In her 12+ year career span at the Harris, she has had various front of house and operations roles, spanning from house management and patron services, facility management and contracting, and curating accessibility training, partnerships, and programming. Hillary has worked internally and externally to inform staff and renters on accessibility features in-house and further resources on access, maintained relevant access and inclusion training initiatives for all users of the space, and helped to navigate collaboration cross departmentally with access planning. Hillary is a current Co-Chair of the Chicago Cultural Accessibility Consortium (CCAC) Steering Committee.

Julie Reese has moved into the interim role as Core Executive Director. Formerly Core's Director of Leadership & Learning, Julie has been with ALA for 22 years, beginning with former divisions LLAMA and ALCTS and now in Core. She quickly grew the continuing education offerings from ALCTS in the years to follow. During her tenure with ALCTS, she saw the birth of web courses—then webinars—and created ALCTS's first-ever virtual forum, the ALCTS Exchange. Most recently, Julie oversaw the development of Core's first in-person conference, Core Forum, which was held in Salt Lake City this fall. Julie earned an ALCTS Presidential Citation in 2007 for her work on ALCTS continuing education and programs, and again in 2017 for her efforts in the creation and production of the ALCTS Exchange. She also earned resolutions from the ALCTS Board on her anniversaries in 2010 and 2015 in honor of her excellent ongoing contributions to ALCTS and its members.

Additionally, we are pleased to announce that **Alena Rivers, was named Association for Library Service to Children (ALSC) Executive Director**. Rivers began serving as interim executive director of ALSC in September of 2021. Since that time, she has worked closely with ALSC's board of directors and members to ensure ALSC's mission, programs, and services align with strategic goals. Rivers has worked to develop new relationships across ALA units and with external stakeholders and peer organizations holding mutual interests. This June Rivers oversaw the highly successful commemoration of the 100th anniversary of the Newbery Awards for excellence in children's literature and one of the most attended Newbery-Caldecott-Legacy Award dinners in the program's recent history. Rivers joined ALA in 2017 as ALSC deputy director. Rivers came to ALA with over 15 years of experience in non-profit management, which included serving as the director of operations for the Illinois African American Coalition for Prevention, as associate director of enrollment management for IES Abroad, a non-profit study-abroad program provider, and as corporate communications and foundation assistant for the Montgomery Ward Foundation. Rivers received her MLIS with a certificate in youth services from Dominican University where she served as a graduate assistant in the Butler Children's Literature Center.

Other searches that are set to open over the next two quarters include a permanent **CMO Director**; **Associated Executive Director for PPA**; **YALSA ED; Deputy Director, OIF; Director of Institutional Advancement and Partnerships**; **MRS Director;** and **Senior Associate Executive Director,** and support positions for **AASL, ALSC, ACRL, Core, HR, ODLOS,** and **IT.**

REPORTS OF ALA UNITS

AMERICAN ASSOCIATION OF SCHOOL LIBRARIANS (AASL)

Unit Manager: Sylvia Knight Norton, AASL Executive Director

Unit Budget: FY22 Close

- Budgeted - Revenue $1,561,030 and Expense $1,484,612
- Actual - Revenue $1,285,618 and Expense $1,259,819
- Budgeted Overhead $262,422; Actual $214,430

# of Staff: 4 (includes executive director) plus one vacant position since January 2022

Revenue Stream(s) the Unit Supports:

☒ Conference Services

☒ Continuing Education

☒ Contributed Revenue

☒ Membership

☒ Publishing

Status Report on Pivot Strategy, Aligned Unit Goals:

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

AASL is below **membership** projections with total dues revenue 20% below budget (actual $269,247 vs budget $338,210). The climate for educators, particularly for school librarians, has not improved with the 2022-23 school year as the profession reports increased stress levels. District level supervisors for school libraries report they are unable to find enough qualified applicants to fill all of their positions. AASL will continue efforts to support all school librarians as we strategically pursue a goal to increase the division membership.

AASL's major sources of revenue are the biennial national conference and sales of The *National School Library Standards for Learners, School Librarians, and School Libraries* (2018) which continue to be solid. Published in conjunction with ALA Editions, the **revenue from AASL Standards totaled $85,744 which was above the $57,078 budgeted for FY22**. Note: ALA Editions receives the same amount of after-expense revenue. AASL and ALA Editions also received an additional $30,000 for a licensing agreement of the AASL Standards. Other sales and royalties from ancillary publications aligned with the AASL Standards provided $40,979 in revenue for non-serial publications. AASL continues to develop publications in conjunction with ALA Editions.

Revenue was lower than budgeted but attendees and exhibitors at the **AASL National Conference** held in October in Salt Lake City were enthusiastic to be at an in-person even with registration (actual $358,357 vs budgeted $525,000) and exhibitors (actual $380,100 vs budget $414,020). Holding the conference provided revenue without the liabilities of cancelling existing contracts while providing a visibility for AASL that included promises to be at the next biennial conference.

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

AASL is actively preparing for the next biennial national conference.   A call for proposals for concurrent sessions has been issued. Registration has launched for the 2023 National Conference to be held October 19-21 in Tampa. There are some social media comments about the location due to state politics and issues of social justice. The AASL Board has confirmed their approval that the conference will be held in Tampa, Florida site and issued "Learning Together, Standing Together" to declare AASL's support for school librarians in the state. The AASL Chapter, FAME, expressed appreciation during their recent state conference.

AASL members report a high level of stress and need for support from ALA. They ask for ALA response to questions regarding book challenges and proposed state regulations that impact school libraries. They also ask for mental health resources and media training to deal with the continuing fight for the right to read.

The AASL Practice Committee identifies trends and ongoing issues and makes recommendations to the AASL Board of Directors for possible action. The Practice Committee submitted report regarding numerous vacancies of positions and the lack of qualified school librarians to fill them in many cities or regions of the country. The AASL Board of Directors moved for a multi-step action item that will explore current recruitment practices and for research to strategies to address the issue.

# of Members (for Divisions): 5,195

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

- AASL social media following continues to grow on all platforms. The biggest growth in Q2 was on TikTok after posting two videos promoting the upcoming 2023 AASL National Conference. (One video was member created and one was AASL produced.) AASL's biggest following is on Twitter, with more than 33,000 followers.
- AASL websites typically show a dip in viewership from mid-November to mid-January and we are currently in the midst of this low tide. The AASL microsite site has seen a bump in viewership recently with the addition of 2023 AASL National Conference information, however, it is still behind last year's viewing stats. (38,799 in Nov/Dec 2021 vs. 34,759 in Nov/Dec 2022 to date.) *Knowledge Quest* continues to earn our top viewership with 48,838 views in Nov/Dec 2022.
- In Nov/Dec 2022, AASL sent 17 emails (AASL Digest, AASL Friday Forecast, and *Knowledge Quest* Updates) for a total audience of 57,089 with an average open rate of 47.3% and click rate of 10%.

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

During Nov/Dec 2022, nine AASL Chapters held state conferences and AASL promotional materials were sent to all. The estimated attendance at these conferences was 3,050. Three of these conferences had AASL leadership providing keynote addresses and/or sessions on AASL resources. These included Michigan (AASL Executive Director Sylvia Knight Norton), Indiana (AASL President-elect Courtney Pentland), and Florida (AASL President Kathy Lester). Reports indicate several conversations with state chapter members who said they were going to join the national association after connecting with leaders.

AASL members and school librarians in general want to feel supported by their association and as part of that we enable them to come together as a community. AASL established Town Halls early in the pandemic and now hold them monthly, giving school librarians a forum to talk and share ideas and concerns. The AASL Town Hall in September featured a new AASL partner, the Anti-Defamation League and their program *No Place for Hate*. October focused on resources and support for school librarians – and supporting each other - during these difficult times amidst threats and challenges. November looked to "Transforming Gratitude and Narrative into Advocacy."

Describe the Most Impactful Unit Activities this Quarter:

Through a generous member donation, AASL in November was able to exhibit at the annual conference of the Association of Middle Level Educators. This provided an opportunity to connect with teachers, administrators and school librarian attendees. AASL held conversations about the integrated frameworks for learners, school librarians, and school libraries of the AASL Standards, promoted our next National Conference with vendors to encourage them to exhibit, and reaffirmed the role of school librarians with numerous educators.

In early October Senator Jack Reed (D-RI) and Representative Raul Grijalva (D-AZ-03) introduced the Right to Read Bill Act to invest in literacy and address disparities in access to school librarian and school library resources. AASL has worked with Rep. Grijalva's office since 2019. Longtime advocate Senator Jack Reed joined the effort to have states address the essential role of school librarian and language that was included in the ESSA authorization of the Elementary and Secondary Education Act. Senator Reed said, "The Right to Read Act is about making sure that low-income, minority, children with disabilities, and English language learners have equal access to that opportunity" and Rep. Grijalva said "we must ensure that our school libraries are equipped to empower and engage students from every background." The bill increases awareness and offers language as opportunities arise to make a real difference for school librarians and their learners. To have real impact requires the support of all of ALA, advocating for this bill and its recognition of school librarians and school libraries for literacy and the Right to Read.

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

Sometimes we take for granted the impact of the day-to-day activities that can make or break the success of a select event. Conference planning is a select activity but so much else goes into showing potential attendees the value of AASL. AASL is like many units, short-staffed, just as we were for the AASL National Conference in 2022 but this fall we began the process of planning another biennial national conference with even fewer staff than the last one. We meet with conference committee members, work through the many details of software and implementation needed for registration and programming and pursue all the myriad of details for planning a major conference. We will also pursue other sources of revenue amidst the other activities of governance - whether a board of directors meeting every month or the grassroots state representation in the school library associations that are in the AASL Chapter Assembly. AASL staff develop quarterly work plans and will follow those as we work with members to activate leadership, new leaders for the ALA ballot, publish research articles for the only research journal in the U.S., publish the next issue of the highly regarded practitioner journal *Knowledge Quest*, and strategically focus on what is essential to the culture and productivity of an ALA division with the responsibilities to lead an entire type of librarian who are dedicated to a profession and meeting a mission to "empower leaders to transform teaching and learning". All these activities and others will continue in the next fiscal quarter as we seek sponsorships, exhibitors, and develop marketing for the AASL National Conference in October 2023.

ASSOCIATION OF COLLEGE AND RESEARCH LIBRARIES (ACRL)

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 – FY22 August Final Close: Revenue $2,086,387 (6% below budget) | Expenses $2,235,493 (24% better than budget) | Net ($149,106) (80% better than budget)

# of Staff: 13

Revenue Stream(s) the Unit Supports:

☒Conference Services

☒Continuing Education

☒Contributed Revenue

☒Membership

☒Publishing

Status Report on Pivot Strategy, Aligned Unit Goals:

Work continued on the division's pivot strategy goals of rebuilding individual membership to the April 2020 level of 9,500 members and increasing organizational membership from the April 2020 level of 605 to 700 by the end of FY22. While the membership targets weren't met in FY22, staff continue using webcasts and other event registration/sign-up email lists in newsletter and marketing distribution, including non-member attendees. Sending email messages about ACRL activities helps keep non-members engaged in the association and will, it is hoped, drive future membership. One area that holds promise is our work with ACRL's Choice publishing unit as we look at ways to drive membership through their customer base of more than 50,000 individuals.

We are also currently running a special promotion to former/never ACRL organizational members (at institutions where librarians have tenure) offering a personal membership discount if the ALA (and/or ACRL) organizational memberships are renewed. The hope is that this promotion will increase both organizational and personal members in FY23 along with the traditional increase in membership during an ACRL conference year. ACRL Associate Director Mary Jane Petrowski is serving on the ALA Membership Cross Functional Team to increase collaboration on membership initiatives across the association. Work on increasing ACRL membership continues and staff will continue to monitor official membership counts as they are released.

As of the August 2022 official count, individual ACRL membership stands at 7,767, organizational membership stands at 506, and corporate membership stands at 18, for a total membership of 8,291.

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

The most recent "Top trends in academic libraries" report, authored by the 2021–22 ACRL Research Planning and Review Committee and published in the June 2022 issue of *C&RL News*, summarizes trending topics in academic librarianship from the past two years. One area on which the report focuses is critical librarianship, including critical information literacy. As the report notes, "… critical librarianship challenges traditional concepts in librarianship. For instance, critical librarianship argues that libraries are not neutral and challenges librarians to take active steps toward antiracist and antioppresive practices both for the benefit of users but also for the benefit of the profession itself."

A special issue of *College & Research Libraries* (*C&RL*) ACRL's official, bi-monthly, online-only scholarly research journal, published this September focuses on critical librarianship approaches to one-shot library instruction. Guest editor Nicole Pagowsky writes in the introduction to the issue that "When deconstructing one-shots and the attendant rhetoric surrounding library instruction work's often transactional nature, transparency through specificity in how we construct, describe, and evaluate our instruction models is important—especially because these transactions exist within systems that reinforce and reflect oppressive conditions more broadly." Articles in the special issue cast a critical eye on the traditions of one-shot instruction through a variety of lenses including equity, diversity, and inclusion models, meta-analysis, and relational teaching.

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

# of Members (for Divisions): 8,291 (August 2022 official count)

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

- Paid online learning attendance: 86 individuals and 2 groups
- Newsletter total opens: 175,231
- Print and ebooks sold/distributed: 1,618
- Journal website total views (*C&RL*, *C&RL News*, *RBM*): 838,500
- ACRL website total visits: 175,842
- Facebook: 33,493 impressions; 1,652 engagements
- Instagram: 8,573 impressions; 512 engagements
- Twitter: 57,261 impressions; 1,848 engagements
- YouTube: 7,045 views; 1,011 hours of watch time

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

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

- ACRL's Online Learning program offered two live webcasts and two online courses during this report period. 86 individuals and two groups participated in e-learning focusing on signature pedagogies, critical information literacy instruction, and online library instruction. Upcoming topics include active learning techniques, redesigning library spaces, and universal design.
- Four new ACRL books were published during Q1 of FY23—one of those books was published twice, in a limited-edition hardcover and then as a paperback—and were promoted for purchase to members and other stakeholders. 990 print and individual-use ebooks were sold, along with 628 institutional ebook copies via distributors.

Describe the Most Impactful Unit Activities this Quarter:

ACRL 2023 Conference Updates
Registration for the ACRL 2023 Conference, "Forging the Future," to be held March 15- 18, 2023, in Pittsburgh and virtually, opened in mid-November. ACRL 2023 will include opportunities to be inspired by keynote speakers Rebecca Nagel and Heather McGhee, participate in concurrent programs, and connect with colleagues. ACRL 2023 features more than 300 live educational programs including keynote and invited presentations, panel sessions, contributed papers, workshops, lightning talks, roundtable discussions, and poster sessions offering insights and inspiration to enhance your library's programs and services. Virtual registration includes live streams of the opening and closing keynotes, hybrid programs with live chat, virtual-only presentations, and networking and wellness opportunities. All registrants also receive full virtual conference access for one year.

The deadline for lightning talk, poster session, roundtable discussion, and virtual conference presentation proposals, along with scholarship applications, was October 14, 2022. A total of 104 conference scholarship were awarded in early December. Conference registration stood at 533 in-person and 68 virtual registrants as of December 15, 2022. The early bird registration deadline is January 20, 2023. Complete details are available on the [conference website](#).

ACRL Awards Process Implementation Task Force Update

ACRL has long honored outstanding contributions to the profession through its annual awards program. In 2020, the ACRL Board of Directors deemed that changes occurring within the Association and across the professional landscape warranted a review and a pause to the program while those transformations took place. Earlier this year, the Board opted to continue the pause on ACRL's award program. ACRL has now formed the ACRL Awards Process Implementation Task Force to consider all ACRL awards and make specific, implementable recommendations for streamlining the ACRL awards process. Details on the task force and awards program from ACRL President Erin L. Ellis are available on ACRL Insider.

ASSOCIATION FOR LIBRARY SERVICE TO CHILDREN (ALSC)

Unit Manager: Alena Rivers – Executive Director

Unit Budget:

- Budgeted revenue and expense: $1,434,843/ $1,262,420
- Actual revenue and expense: $ 2,325,914/$1,419,222

# of Staff: 5.5 and 1 shared position

Revenue Stream(s) the Unit Supports:

☒Membership

Status Report on Pivot Strategy, Aligned Unit Goals:

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

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

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

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

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

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

  In January 2021, the ASLC Board approved the recommendations of the Diversifying Revenue Streams Task Force that focus on high value, high interest, proprietary content, and create an entrepreneurial

culture among members and committees. A working group has been formed to further develop and prioritize the work of the task force. Recommendations were considered by the ALSC board in June 2022 and the task force is considering new areas to expand Día product lines. Of note, ALA Editions and ALSC partnered on a publication honoring the Newbery award, titled The Newbery Practitioner's Guide: Making the Most of the Award in Your Work. ALSC is also considering new areas to expand Día product lines.

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

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

- Censorship and Book Challenges - Numerous committees, including the Public Awareness and Advocacy Committee and Managing Children's Services Committee, have shared information related to reconsideration and book challenges this past quarter. Public and school libraries across the country are continuing to see an uptick in book challenges and new laws are creating unease among librarians. In particular, Missouri recently passed a law threatening criminal prosecution for providing sexually explicit materials to children which may be used to censor books in libraries. Libraries throughout the country are seeing an increase in both direct reconsideration requests and indirect censorship tactics, including patrons purposefully hiding certain materials. These behaviors disproportionally target our BIPOC and LGBTQIA+ colleagues, authors / illustrators, and readers.

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

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

# of Members (for Divisions): 3,509

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

3,509 Members
63,200 – Impressions on Twitter made
55,464 – Reach of our Facebook posts
303 –Institute Registrants for the ALSC 2022 Institute

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

Compared to August 2021, ALSC experienced a 1.63% decline in overall membership. Although we experienced a small decline in membership during FY22, budgeted revenue was still met with a 0% variance. As we approach the half point mark of FY23, we expect the excitement of the 2023 Youth Media Awards, distribution of a Membership Needs Assessment Survey and revision of ALSC's three-year strategic plan will keep the division steady, reaching targeted revenue.
- Welcomed 303 registrants to Kansas City, Mo. for the 2022 ALSC National Institute, which is held biannually.

- Engaged 278 members and non-members in ALSC's virtual Notable Children's Books discussions.
- Engaged 45 members and non-members in ALSC's virtual Notable Children's Recordings discussions.
- 17 students enrolled in two ALSC fall online courses: The Newbery Medal: Past, Present and Future; and The Library in the Middle: Serving Tweens Through Change and Self-Discovery

Describe the Most Impactful Unit Activities this Quarter:

- National Institute - ALSC's biennial in-person conference, held this year in Kansas City, Missouri, from Thursday, 9/29/22 to Saturday, October 1. Highlights included all general session speakers - Christina Soontornvat, Dr. Nicole Cooke, Adam Gidwitz & Hena Khan, and BB Alston, Julian Randall, and Young Vo - as well as two evening receptions - one at Rabbit hOle and one at the Kansas City Public Library - Central Location in downtown KC. ALSC was excited to welcome more than 300 people to the first Institute post-pandemic.

- Due to the shift in alignment of Morris programming (moving the seminar from Midwinter to National Institute) ALSC held the Morris Seminar in two consecutive fiscal years, but one single calendar year. The virtual seminar enables us to reach membership traditionally unable to travel to in-person conferences with a key development program, and our in-person seminar allowed ALSC to provide evaluation training to ALA affiliates who also confer YMAs. This year, ALSC was able to extend an invitation to ALSC Equity Fellows and ALA Affiliates for an opportunity to engage in book evaluation training. Participants from three affiliates as well as an ALSC Equity Fellow were able to join the seminar.

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

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

- Youth Media Awards Press Conference (YMA) – The 2023 YMA announcements will take place on Monday, Jan. 30, 2023, at 8:00 a.m. CT, during LibLearnX. ALSC has been working with other ALA units and our respective award committees in preparation for the announcements. The YMA's include the Newbery, Caldecott, Printz, and Coretta Scott King Book Awards, and provides a guide for parents, educators, librarians, and others in selecting the best materials for youth. The awards are selected by committees composed of librarians and other literature and media experts, and they encourage original and creative work in the field of children's and young adult literature and media.

CHAPTER RELATIONS OFFICE (CRO)

Unit Manager: Michael Dowling

Unit Budget:

- Budgeted   revenue $3,000/expense $179,135 = $-176,135

# 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

Goal is to help promote LLX to Chapters in the South and to Chapters in the Midwest for Annual. Connected with Chapters in Louisiana, Mississippi, Alabama, Texas and Arkansas to promote LLX to their members. Chapter Relations Staff attended four Midwest Chapter Conferences this fall (Indiana, Iowa, Wisconsin, and Michigan) to highlight Annual in Chicago next summer.

Membership

Target is to increase joint-student membership by 4% by end of FY23 and overall student membership by 3% through engagement and resources.

- Joint student membership messaging provided to ALA Student Chapters in the United States in September.

- Student Chapter Leader virtual discussion in October.

- ALA 101 for Student Chapters created by Program Manager and debuted with meeting with UCLA Student Chapter in November. This slide deck and talking points can now be used by any staff or leaders meeting with students.

Continuing Education

- Continued coordination in the fall of trainings for Chapters on new OneClick advocacy platform and state level Bill Track system.

Contributed Revenue

- Communication with 77 Covid Library Relief grantees as they implemented their grant activities throughout 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:

- Concern over censorship challenges and upcoming state legislation across the country in 2023. Will continue to support OIF and PPA's work with Chapters. Provide support for OneClickPolitics by Chapters as needed.

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

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

- 1,000 Midwest Chapter Conference attendees

- Student Chapter Leaders as 60 Chapters.

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

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

Describe the Most Impactful Unit Activities this Quarter:

- Participation in Midwest Chapter Conferences after pandemic hiatus.

- Trainings for Chapters on OneClickPolitics for 2023 State Legislative sessions.

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

- Continued training and support for Chapters use of OneClickPolitics.

- Collaboration with Membership on shared membership recruitment effort with Louisiana Library Association.

- New Chapter Leaders and Chapter Councilor orientations in January and Chapter Leader's session at LLX

CHOICE

Unit Manager: Rachel Hendrick

Unit Budget:

- Budgeted revenue and expense: $2,246,444/$2,456,389 (FY22)
- Actual revenue and expense: $2,314,051/$2,159,569 (FY22 final close)

# of Staff: 17 and one shared position

Revenue Stream(s) the Unit Supports:

☒Publishing

Status Report on Pivot Strategy, Aligned Unit Goals:

In the first quarter of FY23, Choice has been hard a work building content and infrastructure for our LibTech Insights content vertical that will launch in mid-January. We have designed branding, contacted potential writers, and established an advisory group of librarians who will help us curate and promote content. We have opened registration for the LibTech Insights newsletter and people are already signing up to receive content in January. Dimensions, a Digital Science product that tracks research analytics, has signed on as a launch sponsor. Both the parent company, Digital Science, and the Dimensions product are new advertisers for us and indicate that Choice already has brand recognition in the libtech space. We are really excited about the launch of LibTech Insights and the opportunities this content vertical represents for both Choice and the Association.

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

All content listed below was published to Choice360, our open access website, and via newsletter

- In September we published "Book Banning Should Make You Mad as Hell" on our Towards Inclusive Excellence blog to support Banned Book Week.
- In November we published "Don't Worry About Losing #BlackTwitter. It Has "Ancestry" and Will Have "Descendants" on our Towards Inclusive Excellence blog in response to the ongoing Twitter situation.
- In November, the Choice Review of the Week was *Soccer in American Culture: The Beautiful Game's Struggle for Status* (by White, G. Edward. Missouri, 2022) in honor of the World Cup
- Our November Hot Topic was books about Twitter
- Our October Hot Topic was books about Indigenous health, in honor of Indigenous People's Day and World Mental Health Day

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

- Subscriptions: 1,317
- Newsletters: 8,500 (unique subscribers)
- Podcast: 3,400
- Webinars: 5,600 (not unique)

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

Engagement for Choice content remains strong.

- Our newsletter signup for The Authority File (podcast) and Towards Inclusive Excellence content channel grew 198% and 179% between October 2022 and October 2023. These are relatively new lists for us, so it is nice to see this kind of engagement. Our other newsletters maintained their subscription numbers but did not show any growth.
- Chocie360 engagement was down in October, but we expect that to pick up in December when we start publishing lists of Outstanding Academic Titles winners.
- Our webinar attendance is down 59% in October, but this decrease in engagement was expected. The pandemic artificially inflated our numbers because there were no live events. Now that we are competing with live events, we expect to see engagement fall to pre-pandemic levels.

Describe the Most Impactful Unit Activities this Quarter:

- In October Clarivate sponsored the ACRL/Choice Webinar "Open Access in Academia: History, Options and Trends" attracted 1,255 registrants
- In November Digital Science sponsored the ACRL/Choice Webinar "New White House Open Access Rules: How Libraries Can Help Researchers & Faculty Scale The Paywall" which attracted 1104 registrants who were interested in knowing more about White House Office of Science and Technology Policy (OSTP) August 25th announcement.
- In late November, our Towards Inclusive Excellence blog published a podcast conversation with Dr. Adriene Lim on academic leadership and the bamboo ceiling.

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

- Choice is participating in Giving Tuesday 2022.

- In December, Choice will publish the 2022 Outstanding Academic Titles list.
- In January, Choice will launch our LibTech Insights content vertical.

COMMUNICATIONS AND MARKETING OFFICE (CMO)

Unit Manager: Payal Patel, Interim Director

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

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

Revenue Stream(s) the Unit Supports:

☒Conference Services

☒Continuing Education

☒Contributed Revenue

☒Membership

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

Through the first fiscal quarter of the year, CMO continues to react to media inquiries regarding censorship, book banning, and general inquiries about library trends. The need for media relations capacity is recognized and the goal is to have a media relations agency in place before the end of the second fiscal quarter. With this partnership, there will be more opportunities to elevate the good work and initiatives from ALA in the media.

Describe the Most Impactful Unit Activities this Quarter:

CMO collaborated with Chappell Communications Group in September to amplify awareness around Library Card Sign Up Month on social media.

CMO, working with OIF and PPA, responded to scores of media requests for comments on banned books this quarter. Deborah Caldwell-Stone (Director of OIF), Lessa Pelayo-Lozada (ALA President) and Kathy Lester (AASL President) are the primary spokespeople when it comes to censorship as it pertains to legislation, school libraries, and overall awareness of the issue. Please see the OIF section of this report for more information on Banned Books Week.

During Q1 Executive Director Tracie Hall was announced as the recipient for the National Book Foundation's Lifetime Achievement Award which generated media interest. Hall made several appearances on National Public Radio (NPR) stations across the country including "Weekend Edition" with Scott Simon, Library Journal, and the LA Times.

ILoveLibraries.org

During the period from September 1, 2022, to December 16, 2022, ilovelibraries.org (ALA's public facing website) netted 84,144 total page views–an almost 10,000 view increase from FY22 Q4.

These were our top 10 most viewed articles:

Romance Novelist Donates $50,000 to Embattled Michigan Library (Sept. 1, 2022)

Why I Left: A Librarian Speaks Out After Quitting Her Job Due to Community Complaints Over LGBTQ+ Books (Sept. 21, 2022)

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

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

The Top 10 Banned and Challenged Books of 2020 (April 16, 2021)

"History is freaking cool you guys!" Lizzo Brings History to Life with James Madison's Flute (Sept. 28. 2022)

R. L. Stine on the Librarian Who Turned Him Into a Writer (Sept. 22, 2022)

Holidays Gifts for Book Lovers of All Ages (Nov. 22, 202)

Blippi encourages early literacy at your library (Dec. 9, 2021)

Not a Badge of Honor: Jason Reynolds on book banning in libraries (Dec. 3, 2021)

Social Media

ALA and I Love Libraries Social Media Metrics

Social Media Channel	Followers/Fans	Impressions	Engagements	Clicks
ALA Twitter	229,910	1,598,298	35,066	4,468

I Love Libraries Twitter	60,125	65,555	2,039	500
ALA Facebook	220,110	889,722	34,258	4,193
I Love Libraries Facebook	114,301	346,863	24,321	3,345
ALA Instagram	75,620	581,651	28,033	1,502
ALA LinkedIn	89,481	311,959	6,885	4,334

I Love My Librarian Award

CMO manages the annual I Love My Librarian Award, which invites all members of the general public to nominate librarians in their community. Nominations closed on September 30 with over 1,500 submissions from library users and advocates across the country. The 10 awardees for the 2023 award will be announced in early January, ahead of the award presentation at LLX 2023.

Unite Against Book Bans

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

ALA Annual Conference Marketing

CMO continues to assist with marketing ALA conferences, including strategy, website, email marketing, and placement of digital ads. For LibLearnX, ads placed on the Feathr digital ad platform garnered 150,238 views, 916 clicks, and 74 conversions, so far. Ads placed for ALA Annual 2022 garnered 280,827 views, 1,528 clicks, and 657 conversions.

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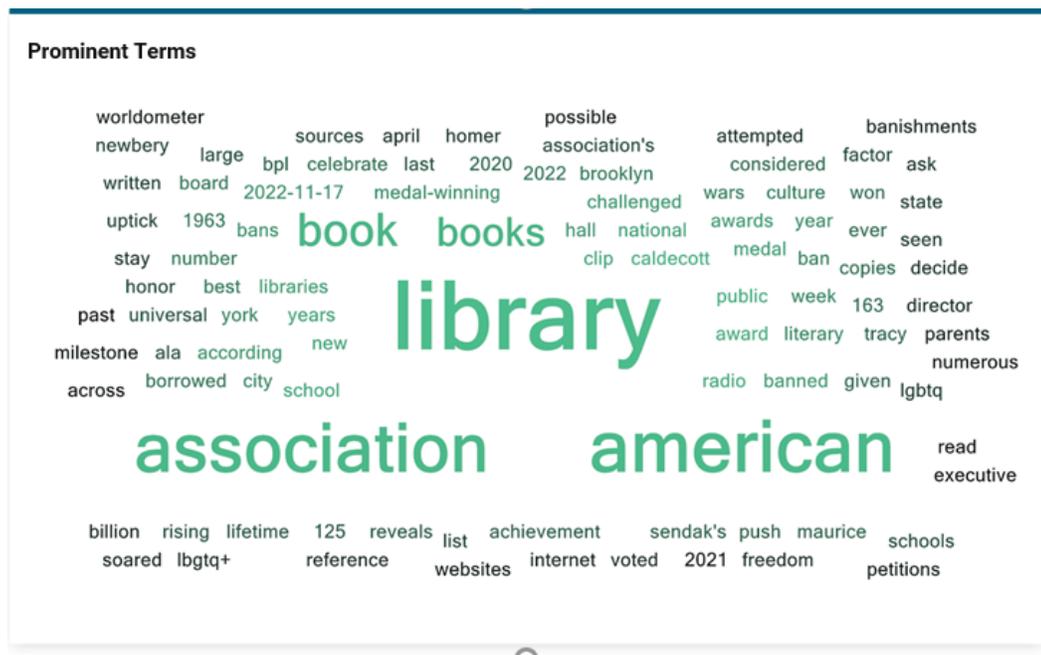
Per the News Media Alliance (formerly the Newspaper Association of America), more than 1,300 daily newspapers and 5,700 weekly newspapers in the United States, so the following placements should be viewed as a snapshot of coverage.

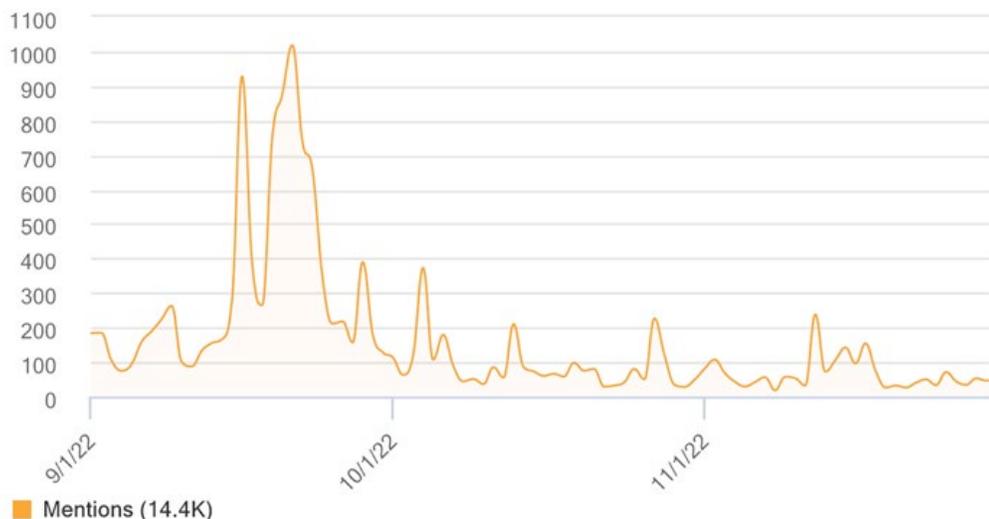Overall Media Snapshot for September 1, 2022 - November 30, 2022

14,400 articles/mentions

15.4 billion in circulation

$36 million in publicity value

Prominent Terms

worldometer
newbery   sources april homer   possible   attempted   banishments
large   bpl celebrate last   2020   association's   considered factor ask
written board   2022-11-17   medal-winning   2022 brooklyn   wars culture won state
uptick 1963 bans **book** **books**   challenged   awards year ever seen
stay number   hall national   clip caldecott   medal ban   copies decide
honor best libraries   **library**   public week 163 director
past universal york years   award literary tracy parents
milestone ala according   new   numerous
across borrowed city school   radio banned given lgbtq

association   **american**   read
executive

billion rising lifetime   125   reveals list   achievement   sendak's push maurice   schools
soared lbgtq+   reference   websites   internet voted 2021 freedom   petitions

Total Mentions

■ Mentions (14.4K)

Upcoming Events

January | LibLearnX

April | National Library Week

CONFERENCE SERVICES

Unit Manager: Earla Jones

Unit Budget:

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

# of Staff: 7 staff (8 positions)

Revenue Stream(s) the Unit Supports:

⊠Conference Services

Status Report on Pivot Strategy, Aligned Unit Goals:

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

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

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

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

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

LibLearnX registration opened later than planned to provide the ALA Executive Board additional time to assess and deliberate the budgeted registration rate structure. As a result, "introductory" pricing was made available to members; added as a promotional incentive. Despite the delay in launch, initial reports were strong with over 700 total registrants the first week at 13 weeks out. Trends are showing a steady pace for registrants in all areas except for exhibitors. Hall Erickson's booth sales pace is behind projections with reports indicating that exhibiting companies are opting for smaller booth sizes and are bringing less personnel onsite. This parallels what other units at ALA are experiencing regarding conservative vendor spending currently.

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

Event marketing statistics reveal that throughout the eblast registration *timeframe of Sept 15 – Dec 14, and using our list of approximately 72.2K, we have delivered 1,010,170 emails. There were 296,967 (29.3%) people who opened, and 5,788 (1.9%) who clicked-through, captured as n unique LibLearnX website visits.

*a total of 22 eblasts, as of 12/14/22

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

The marketing and promotion strategy to engage the ALA members and constituents continued this quarter for the upcoming LibLearnX. Marketing efforts include asset and toolkit creation; engaging internal and external marketing partners and amplifiers; social media; collaborative promotion with host city. CMO provides support through digital advertising; email marketing copy; media pitching; on-site social media and external media support; ongoing consulting/advisory role, including prioritization of opportunities.

Conference Services provided marketing toolkits with social media copy, digital graphics, and talking points to the ALA Executive Board; ALA Staff; Content Leaders; Author Speakers; Sponsors; and State Chapters.

The following segments have been identified as audiences in the promotional strategy:

Segments:

- ALA Council
- LLX22 Attendees
- AC22 First Time
- International (mostly for LLX Studio)
- eLearning attendees (mostly for LLX Studio)
- Regional – surrounding states: Alabama, Arkansas, Florida, Louisiana, Mississippi, Texas
- LIS schools

Third Party:
- Partner Promotion with State Chapter and libraries to promote to their staff and members
- ALA Staff, ALA Divisions/Units
- ALA Round Tables
- ALA Affiliates
- Membership
- Swap Agreements
- Exhibitors and Publishers
- Local Planning Committee
- Board
- Conference Committee
- Host city (New Orleans)

Targeted brand personas receiving tailored marketing messages include Early-career/Students, Mid-career/Managers, Directors/Library Leaders, Library Advocates/Influencers, ALA Member Leaders, and Vendors/Exhibitors.

Describe the Most Impactful Unit Activities this Quarter:

1. September 15 - Focused marketing began for LibLearnX: The Library Learning Experience -- https://www.alaliblearnx.org/. Strong programs, speakers, and events such as the inaugural ALA Governance Institute are getting good response.

2. September 16 –The Annual Conference 2023 call for presentations closed and the ALA Conference Committee met in November to finalize the program.

3. October 26 – Registration opened for LibLearnX with sample programs available on the website. Special pricing was available the first week of registration. Early rates were available through November 30. Advance rates went into effect December 1. Standard rates will apply as of January 15.

4. Newly hired staff are adding important capacity in content planning and management and logistical support focused on helping all staff better support a smooth attendee experience.

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

In January 2023, ALA will host the first in-person LibLearnX: The Library Learning Experience and LLX Digital Experience. Mid-month, the initial Save-the-Date will be distributed to kick off promotion for the next Annual Conference June 22-27, 2022, in Chicago, IL. Registration is slated to open February 15, 2023.

CONTINUING EDUCATION

Revenue Stream/Division Manager: Daniel Freeman

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

 # Of Staff: 2

Revenue Stream or Division:

    ☐Conference Services   ☐AASL ☐United for Libraries

    ☒Continuing Education   ☐ALSC ☐YASLA.

    ☐Contributed Revenue   ☐ACRL

    ☐Membership   ☐Core: Leadership, Infrastructure, Futures

    ☐Publishing   ☐PLA

    ☐Data, Research & Design   ☐RUSA

Status Report on Pivot Strategy, Aligned Unit Goals:

The CE unit assisted units across the association, and continued efforts to centralize and standardize CE across the association while also offering a full schedule of events.

- o Process standardization across ALA in several areas:
    - Acting as the central contact for eLearning bulk purchasing at ALA, CE established a process for negotiation of bulk prices across multiple units which has already been used to execute over 25transactions. This supports the pivot strategy by having a direct, positive impact on revenue in both the short and long term.
    - Working with IT to develop an eLearning project management tool that will govern eLearning event acquisition and execution, increasing transparency and reducing redundancy. This supports the pivot strategy by increasing efficiency, which will lower expenses year to year.
    - In collaboration with the Continuing Education CFT (cross-functional team), creating policies for free events that ensure a strategic approach and clear communication of value to members and other stakeholders. This supports the pivot strategy by improving member service and helping drive membership.
- o Engaging with the LMS vendor to create a member-exclusive tool and recommendation block that will help generate more revenue and encourage more LMS users to become members and provide valuable data to drive member retention and marketing. This supports the pivot strategy by driving revenue and membership.
- o Launched new eLearning partnerships with YALSA, FTRF, and the Sustainable Libraries Initiative, and continued our successful partnerships with San Jose State University and the Music Library Association. This supports the pivot strategy by increasing efficiency, driving revenue reducing expenses, increasing collaboration and supporting membership.
- o Assisted Core and RUSA in marketing their online events, helping them to drive registration and related revenue. This supports the pivot strategy by driving revenue and division membership.

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

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

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

The need for a free-event strategy is pressing because ALA faces a saturated market where both our competitors and the availability of large amounts of free content push members of our audience away from paid events.

 # Of Members/non-members/other stakeholders reached during quarter: Over 20,000 have created accounts on the eLearning site since it launched in November 2021; over 40,000 reached through marketing, and an undetermined number through word of mouth.

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

Feedback on the ALA eLearning site continues to be positive and Collaboration with member groups and stakeholders across ALA continues to grow.

- CE and YALSA have launched their new partnership. This will lead to around 12 YALSA events in FY23 (a dramatic increase from previous years), increased revenue, and more opportunities to engage with library staff who serve teens.
- CE is partnering with OIF and FTRF to offer two events:
  - *Defending Intellectual Freedom: Facing Challenges and Fighting Back*, a three-part webinar series.
  - A custom five-part series in partnership with the Massachusetts State Library that will take place in early 2023.
- By partnering with the Sustainable Libraries Initiative for the new eCourse *Sustainable Librarianship: Core Competencies and Practices*, CE has increased ALA's reach to member libraries of this organization.

Describe the Most Impactful Unit Activities this Quarter:

- The launch of the YALSA partnership has already increased synergy and reduced duplication of effort. Staff outreach to potential instructors is underway and several new events are imminent.
- As of the end of the first quarter, sales are at approximately $135,000, about 80% of the year-to-date budget. With a full schedule in early 2023 and events from the YALSA partnership launching in the spring, we anticipate closing that gap in the new year.
- Using policies recommended by the CFT and adopted by eLearning stakeholders, CE has facilitated several large bulk purchases, generating revenue through its own events and others. To date, these bulk sales have generated a total of nearly $105,000 in revenue that has been shared with RUSA, PLA and HRDR.
- The launch of two new crash-course series—The Reference Services Crash Course (marketing to begin in early 2023) and the Collection Development Crash Course, which has already generated over $5,000 in revenue.

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

- The anti-racist library services course will be launching in April.
- CE will be adding to the promising crash course series with a programming crash course, and we are discussing crash courses in EDISJ, Customer Service and Library Marketing.
- In collaboration with the membership office, creating a series of presentations with leaders in the field that will be a primary exclusive learning product for ALA members and will also be for sale to nonmembers.
- Building content for the *Core Competencies for Library Staff* package, a primer series for new library staff—mostly paraprofessionals—to provide an overview skillset.
- Selecting a vendor to build the new project management system.

CORE: LEADERSHIP, INFRASTRUCTURE, FUTURES

Unit Manager: Julie Reese, Interim ED

Unit Budget: 415

	FY21 Actual	FY22 Budget	Variance	FY22 Actual
Revenues	$ 668,749	$ 909,800	$ (320,469)	$ 589,331
Expenses	$ 676,004	$ 922,969	$ 289,331	$ 633,638
Net	$ (7,255)	$ (13,169)	$ (31,138)	$ (44,307)

Summary:

Both revenue and expenses for FY22 are well under budget, resulting in a negative variance of ($31,138), compared to budget. Note that beginning in mid-April, the executive director began splitting time/salary with the ALA Communications and Marketing Office. This arrangement continued through the end of September 2022, which resulted in a positive variance in the salary line. Offsetting salary savings are two areas of revenue concern: membership and continuing education, both noted below. The continuing variance in membership revenue, reflective of a declining membership, is the biggest threat to the Core project. The need to increase membership by finding capacity to focus on value, is an ongoing priority of member leaders and staff. Webinar revenue is the largest variance in year-end actuals for two main reasons: fewer webinars were held than planned and registration was lower than expected. CE staff project that the variance will improve in fiscal year 2023. The Leadership Institute was not held in FY22 due to a lack of staff capacity, which resulted in a negative variance in FY22. This negative variance will continue in FY23 as it will not be held in fiscal year 2023, again due to lack of staff capacity.

# of Staff: 5

Revenue Stream(s) the Unit Supports:

☒ Conference Services

☒ Continuing Education

☒ Contributed Revenue

☒ Membership

☒ Publishing

Status Report on Pivot Strategy, Aligned Unit Goals:

The Core Board is meeting January 9, 2023, to finalize the strategic plan.

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

- In December 2022, Brooke Morris-Chott, the Advocacy and EDI Program Officer left Core/ALA. Her duties were distributed to remaining Core staff until a new hire is in place.
- Membership numbers are continuing to decline. In an effort to increase membership recruitment and retention, Core will conduct a search to fill the open Membership & Marketing Specialist position rather than the advocacy and EDI one. The strategic plan is focusing on specific equity efforts that can be managed throughout the organization rather than one specific role or committee.
- Our biggest membership and marketing challenge continues to be our inability to contact one-third of our members using the Informz email marketing software because they have unsubscribed from ALA emails there. Of our current 4,100+ members, we can send membership and marketing emails to only 2,800 of them, which severely limits our ability to promote the value and benefits of Core membership. In FY22, we have seen the trend of unsubscribes to Informz messages increase from 25% in FY21 to 33% in FY22. In a quick scan of Informz groups, we believe this to be a system-wide issue that is affecting every ALA unit, including all divisions and round tables. We would like ALA to conduct an audit of the opt-out options on every Informz template in the system to determine if any settings need to be corrected to reduce the increase in unsubscribe rates.

# of Members (for Divisions): 4,400

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

Produced:

- 9 courses reaching 267 individuals

  - Core Members - 28
  - ALA Members - 60
  - Non Members -179

- 11 paid and free webinars reaching 537 individuals and groups

  - Core Members -249
  - ALA Members – 68
  - Non Members -84
  - ALA Student Members/LIS Faculty/Free Webinar- 136

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

FY22: Core membership dropped approximately 12% from August 2021 to August 2022. In May 2022, we migrated the process to join a Core section from ALA Connect to ALA's join/renew form on the Ecommerce site. As a result, we began tracking join and drop numbers for our sections.

Overall trends show a continued need to increase staff capacity to focus on both recruitment and retention. Throughout FY22, we saw a decrease in the number of year-over-year membership drops, with fewer people leaving Core every month in FY22 than had left during that month in FY21. For example, in September 2021, 236 members dropped their Core membership. In September 2022, that number was 133. We do not yet have any figures for FY23, but this is a positive trend that we are working hard to continue.

For all six of our sections, the monthly joins from May through August 2022 showed increases every month, another positive trend. We already customize our content by section (see example), so higher section participation has been a major goal for us. We plan to build on this segmented approach to content in the future.

Core maintains a spreadsheet of our Membership Statistics for easy tracking.

During Q1, several Core groups held successful online events.

- *Authority Control Interest Group*, September 27 = 579 registrations, 409 live attendees
- *Continuing Resources Cataloging Committee Forum*, September 29 = 345 registrants, 202 live attendees
- *Technical Services Managers in Academic Libraries Interest Group Virtual Brown Bag Discussion*, November 3 = 108 registrants, 64 live participants
- *Collection Evaluation & Assessment Interest Group*, November 8 = 20 registrants, 11 live attendees
- *Core OCLC WMS Sandbox Orientation*, November 17 = 42 registrants, 28 live attendees

Describe the Most Impactful Unit Activities this Quarter:

- The Core Forum took place Oct 13-15 in Salt Lake City. More than 40 programs and preconferences were presented. Registration reached 272. Budget was based on 300 in attendance.
- We are seeing increased webinar attendance and higher group purchases for Continuing Education events. CE gross revenue in Q1 of FY23 is at $79,116, compared to $45,996 in Q1 of FY22.
- In honor of Open Access Week 2022, Core held a one-week campaign (October 24-30) to raise funds to help the three journals (Information Technology and Libraries, Library Leadership & Management, and Library Resources & Technical Services) be sustainably open access.

- New Member Benefit announced: Free Access to the OCLC WorldShare Management Services Sandbox, the test environment for the WMS platform, to allow Core members seeking professional development opportunities a chance to work hands-on with a cloud-based library management system.
- The Core Leadership Development & Mentoring Committee launched a new Mentoring Program that pairs Core members who are currently in leadership positions with Core members who are interested in becoming leaders.
- On December 8, the Core Technology Section held a virtual event for current and prospective members to learn how to get involved in committees, interest groups, and other opportunities within the section.
- Members continue to give us positive feedback about our weekly "This Week in Core" email to members, started in March 2022.

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

- The Core journal *Library Resources & Technical Services (LRTS)* will go fully open access in early 2023. This is the culmination of years of work. Also in 2023, all three journals will move to the same platform and standardize on the same version of the software. This project will take large amounts of volunteer and staff time.
- This past fall, our Diversity & Inclusion Committee implemented a liaison program with each Core committee. EDI liaisons will submit their first biannual reports as part of this program in January 2023. The reports will allow us to better understand, coordinate, and amplify all the DEI activities happening across Core, as well as help us identify gaps that need to be addressed.
- We anticipate adding our first open source software sandboxes for members to learn new CE skills starting in January 2023. These programs will complement our new OCLC WMS Sandbox member benefit.
- Based on our sandbox program, archive of 100+ on-demand recordings, and free webinar registration for Core students, we plan to reach out to library schools to discuss group memberships for their student bodies.
- Interest Group Week will be held March 6-10, 2023. This annual event consists of 25 discussions and programs over 5 days.
- Preservation Week will be held April 30 – May 6, 2023.

DEVELOPMENT OFFICE

Unit Manager: Tracie Hall/Anne Manly

Name of Unit: Development

Unit Budget:

- FY23 Budgeted revenue: $4.5M
- FY23 To Date Actual revenue: $3M

# of Staff: 3.5

Revenue Stream(s) the Unit Supports:

☒Conference Services

☒Continuing Education

☒Contributed Revenue

☒Membership

☒Publishing

Status Report on Pivot Strategy, Aligned Unit Goals (Max. 250 words, Calibri, 11 pt):

The Development is pleased to have received several major donations in December from a large foundation and from a family foundation which will constitute substantial progress towards Development's Pivot Strategy goal. Press releases for these grants and donations will be issued later this month and in February. Development will provide greater written detail after LLX and will fully describe the expected projects and activities to be funded by these grants in the April and June Executive Director reports.

Describe the major issues, trends, opportunities, or concerns that your unit has or is responding to at the closing of this fiscal quarter (Max. 275 words, Calibri, 11 pt:

At the end of this quarter, Development has seen a slight uptick in donations and inquiries regarding Donor Advised Funds and Qualified Charitable Distributions. Development has long recognized the value in these giving vehicles and believes there will be a trend towards more activity in this vein. Continuing a trend from last year, Development is seeing a significant amount of issue-based donations, particularly in the area of intellectual freedom and banned books.

Development has heard from some individual donors that inflation is affecting giving this year. Development is pleased to see recent reports which indicate inflation may be easing. The demise of CARES Act tax incentives has also been raised by funders but so far we have not seen a drop in donations that can be attributed to that.

ALA was recently approached by a newly created well-resourced funder who invited ALA to apply for their inaugural round of grants, which we did, and which was ultimately approved. The funder's Program Officer relayed how when discussing potential grantees, libraries did not first occur to them, but one member of their team suggested ALA after hearing about our work (either in the newspaper or through an interview). Development attributes this to ALA's increased public profile, including activities by ALA's leadership, as well as our increased profile due to our Intellectual Freedom work. We expect this trend to continue.

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

Narrative Description Members/non-members/other stakeholder engagement (Max. 250 words, Calibri, 11 pt):

Development engaged direct member communication through our Giving Tuesday and End of Year communications, via social media, email, and direct mailing. Engagement statistics and analysis are not available at this time and Development will provide a verbal update at the next Executive Board meeting.

Describe the Most Impactful Unit Activities this Quarter (Max. 275 words, Calibri, 11 pt)

On November 29, Development supported PAG's "Treasure Our Treasures" event, a gathering of gratitude for our community. Presenters included ALA President Lessa Kanani'opua Pelayo-Lozada (calling in from Guadalajara!), PAG Chair Nancy Davenport, Tiffany Mack (ALA staff and member), ALA President Elect Emily Drabinski, Librarian Martha Hickson, SourceBook Senior Director Margaret Coffee, PPA Interim Associate Executive Director Alan Inouye, ODLOS Director Kevin Strowder, Hillary Pearson (ALA's new Program Manager, Accessibility Services), and ALA Executive Director Tracie Hall.

Development continued to support the Alford Consulting Group, which is conducting a feasibility study in preparation of ALA upcoming major fundraising campaign.

This year's Giving Tuesday campaign resulted in a continuation of the slow but steady increase in donations from year to year. Giving Tuesday 2022 day-of donations were $21,993 and the week-before and week-of total donations were $36,999. Giving Tuesday 2021 day-of total donations were $20,110 and the week-before and week-of in 2021 totaled $30,222. Overall, that's an increase of approximately $9,000. Development will provide a more detailed verbal analysis of Giving Tuesday, including a breakdown of donations to specific units and a comparison of past results at the next Executive Board meeting. In addition, the End-of-Year mailings results are not available at this time, but information will be provided later.

Please review the **Donations and Grants, FY 2023 Q1 - September 1, 2022 - November 30, 2022 charts** at the end of this report. Note that the significant donations referenced above occurred after November 30, 2022 and are not reflected in these charts. FY 2023 Q2 charts will contain those contributions.

Select Future Activities and Events Through End of Next Fiscal Quarter (Max. 275 words, Calibri, 11 pt):

As indicated above, ALA is the recipient of a substantial grant which will be discussed in more detail after LLX. This complicated grant will involve over a dozen ALA units. We are extremely grateful for this opportunity and look forward to meeting with ALA units and overseeing ALA's responsibilities arising from the grant.
In November, ALA's Grants, External Partnerships, Fundraising Cross Functional team (co-chaired by Anne Manly and Melanie Welch, Executive Director of PPO) sunset its initial phase and began to move towards a longer-term stakeholder group to carry out and maintain the team's goals. This new phase will be coordinated by Development and will include the creation of a stakeholder group consisting of units involved in fundraising, financial management, communications, and information management. The stakeholder group will strive to (1) improve the way we communicate internally with each other to coordinate and strategically approach funders; (2) evidence, collate and communicate the data that partners need to measure activity, outcomes, and impact; and (3) broaden our reach beyond the traditional library community and seek support from funders for workforce development, employment, and healthcare.

This coming quarter, ALA's Development Office aims to overhaul its calendar to better reflect events, corporate, foundation, and government prospects, individual donors, reporting obligations, renewal dates, external events of note, and campaigns. Development will continue its support of the Philanthropic Advisory Group. Among other planned priorities, Development will work with PAG and internal partners on the creation of a PAG webpage. Following the highly successful PAG-hosted event at the Library of Congress during ALA's Annual 2022 Conference, PAG has already begun planning a high-profile event for Annual 2023.

Donations and Grants, FY 2023 Q1 - September 1, 2022 - November 30, 2022*

Q1 Giving from Corporations, Foundations, Organizations, Government, and Individuals, Breakdown

Type	Number of Donors	Number of Gifts	Amount	Median	Average
Corporation	35	46	$ 739,834	$ 796	$ 16,083
Foundation	14	26	$ 285,766	$ 124	$ 10,991
Government Agency	7	12	$ 99,928	$ 7,359	$ 8,327
Non-Profit	11	14	$ 35,471	$ 665	$ 2,534
Individuals	703	996	$ 102,414	$ 25	$ 103
	770	1094	$ 1,263,413	$36	$ 1,155
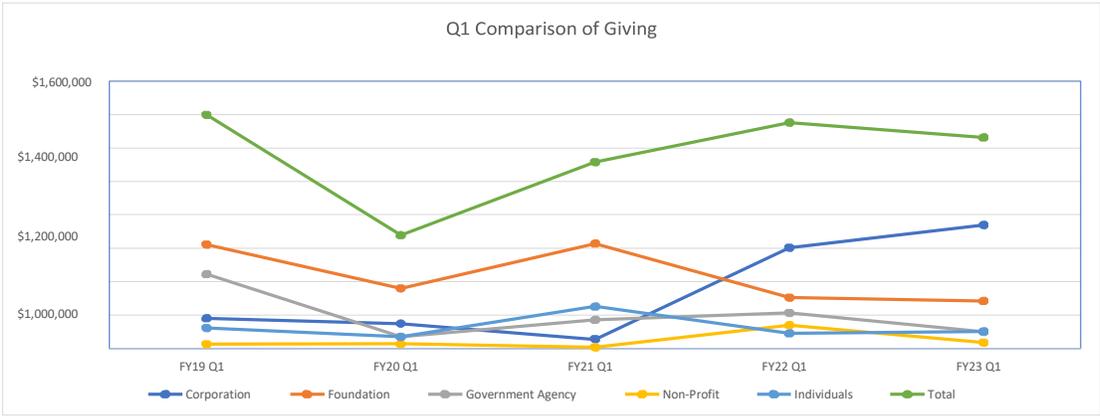
Q1 Comparison of Giving

Q1 Comparison of Giving from Corporations, Foundations, Organizations, Government, and Individuals

Type	FY19 Q1	FY20 Q1	FY21 Q1	FY22 Q1	FY23 Q1
Corporation	$ 181,961	$ 149,216	$ 55,837	$ 603,428	$ 739,834
Foundation	$ 622,462	$ 359,501	$ 628,047	$ 304,923	$ 285,766
Government Agency	$ 445,908	$ 70,572	$ 172,483	$ 212,713	$ 99,928
Non-Profit	$ 25,756	$ 29,485	$ 7,650	$ 140,242	$ 35,471
Individuals	$ 122,541	$ 70,163	$ 251,895	$ 91,194	$ 102,414
Total	$ 1,398,628	$ 678,937	$ 1,115,911	$ 1,352,500	$ 1,263,413

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

Type	FY19	FY20	FY21	FY22	FY23 YTD
Corporation	$ 2,565,410	$ 2,692,473	$ 1,113,897	$ 8,120,435	$ 739,834
Foundation	$ 1,441,422	$ 4,999,703	$ 5,227,199	$ 3,121,464	$ 285,766
Government Agency	$ 1,973,256	$ 764,663	$ 1,027,791	$ 3,421,272	$ 99,928
Non-Profit	$ 745,509	$ 334,114	$ 55,746	$ 515,310	$ 35,471
Individuals	$ 555,644	$ 604,084	$ 569,525	$ 730,495	$ 102,414
	$ 7,281,241	$ 9,395,037	$ 7,994,158	$ 15,908,977	$ 1,263,413

FINANCE AND ACCOUNTING

Unit Manager: Dina Tsourdinis

FY 2023 Budget Amount (Overall Expense): $1,845,0149

# of Staff: 8 full-time staff and three temporary staff

Revenue Stream(s) the Unit Supports:

☒Conference Services

☒Continuing Education

☒Contributed Revenue

☒Membership

☒Publishing

Status Report on Pivot Strategy, Aligned Unit Goals:

Streamline the accounting and month-end closing process:

 Beginning in December 2021, the department moved to a monthly reporting schedule to provide more timely information to our members and unit managers. With continuous efforts to bring our reporting current, the financial closing schedule will periodically vary to accommodate important cyclical events such as the financial statement audit. When a change in the monthly plan is anticipated, we will notify all stakeholders.

Timely financial reporting:

We are happy to report that the goal of current financial reporting is met. The accounting staff is working on the first quarter of 2023 closing.

The continuation of timely financial reporting is a collaborative effort across all units at the Association. Accounting processes over 2,000 invoices monthly. It is essential to establish invoice submission cutoffs. Effective with the fiscal year 2023, all Unit Managers must adhere to the published deadlines and cutoffs for invoices and inter-unit transfers. We will apply Generally Accepted Accounting Principles (GAAP) at year-end and for interim financial reporting. One important deadline is the invoice submission by all units, which is the 15th of each month for any previous month's invoices.

Cross-training:

 Cross-training has begun. Certain accounting functions are performed by new staff to share knowledge and enrich their understanding of all processes of Accounting, as well as provide coverage of critical tasks. As the knowledge transfer occurs, documentation of the procedures is established. This will provide guidelines for training purposes as well as continuous workflow when there is turnover amongst staff members and unanticipated absences.

Important F&A updates:

We are following a new approach to monthly closings, prioritizing the revenue recording from the membership system (iMIS revenues) and non-iMIS revenue. The prioritization of revenue recognition benefits our members and customers as their account is credited timely and dramatically contributes to expediting the financial report issuance.

This fiscal year we began the framework for aligning accounting procedures with the budgeting process. Two examples are the prepaid expense and the deferred Revenue for conference-related costs.

1. The prepaid expense procedure provided guidelines to Unit Managers on the treatment of prepaid expenses and the appropriate threshold for allocating prepaid costs for budgeting and accounting purposes.
2. The matching of revenues and expenses is applied entirely rather than partially effective FY 2023. I recently became aware that the Association was using an old practice of expensing prepayment for a conference in the year before the meeting. This practice was not in conformance with accounting standards, and we changed it to be consistent in applying accounting principles.

In October 2022, the Accounting department added an Accounting Manager who will manage the efforts of revenue recognition and lead the accounting team who works in this functional area. In addition, this position will participate in all aspects of monthly financial closings.

The Accounts Payable process was reviewed and updated to eliminate delays. The Association's Accounts Payable volume is heavy and highly regulated. There is an opportunity to improve our staff's efficiency and provide excellent service to our stakeholders by reviewing and updating the technology used by Accounting and Finance staff. We are currently studying a complete workflow system by Concur to replace the accounts payable temporary module using Airtable, which worked well during the pandemic.

In collaboration with the IT department, our financial accounting systems were updated to prepare us for the 1099 tax reporting season in January 2023.

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

- The established operating structures of ALA with multiple portals, payment vendors processing payments without identification, and the ALA-issued manual invoices without a centralized system are significant obstacles in closing the books. In collaboration with IT, we will be working on documenting, automating, and centralizing the financial activities in a way that will be more efficient and cost-saving.
- Stabilizing staffing in the Accounting Department is a work in progress with new temporary staff, and the structure is under review:
  The accounting department's new staff are being trained and have shown significant progress.
  The turnover has diminished due to substantial efforts by the team to support, mentor, and motivate the new team members. However, the turnover may continue for temporary staff offered permanent positions by other employers.
  Due to the financial reporting delays in FY 2022, the focus was catching up and remediating from the outsourcing, causing certain account reconciliations to fall behind the last fiscal year, 2022. The backlog in reconciliations created an opportunity to review and reconcile all accounts for the audit and shortened the number of year-end closes from 3 to 2.
- Systems integration is necessary with workflow approvals. Our systems need to be updated or replaced to avoid the multiple methods used for payment validation, authorization, and processing.
- The Grants process was updated in conformance with current Generally Accepted Accounting Principles (GAAP). All fundraising units were trained, and we are excited about applying the new approach in FY 2023.
- Resources in a very complex association with multiple systems and processors of payments is still an issue causing overload for F&A staff.

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

Describe the Most Impactful Unit Activities this Quarter

- We used accelerated closing techniques to close the fiscal year 2022, and our F&A team was able to help unit managers make adjustments even after the announced cutoffs. We are happy to have assisted our Units with their adjustments even after the deadlines.
- Customer service has significantly improved.
- The Association is fully protected against fraud by implementing positive pay for checks and ACH transactions.
- The Employee Retention Grant application for federal funding was mailed to the IRS for an amount higher than expected. The total refund will be $3,078,786.49.
- We have ongoing expense reduction efforts with Expense Reduction Analysts (ERA).
  With ERA's negotiating power and our Human Resources department's diligence and expertise, we realized a savings of $165,000 without changing our broker or health benefits for our employees. The ERA team provides free consultation services and will bill only on realized savings. The following areas are currently under review by ERA and Unit Managers to renegotiate top-tier products and services through competitive bidding and vendor consolidation:
  - ➢ Property-casualty insurance
  - ➢ Information Technology
  - ➢ Printing
- The Accounting Department prepared all necessary documents for the annual financial audit. All balance sheets and cash accounts were reconciled as of 8/31/22. Our goal is to follow up on open items mad keep reconciliations current. The audit fieldwork is ongoing.
- Our Accounts Payable team has been working on streamlining the payment process.
- The F&A team, in collaboration with IT and The Executive Director of UFL, trained all Unit Managers on Accounts Payable. Specific modules included creating new vendors, regulatory reporting requirements, navigating the AirTable for approvals, using a secure portal to submit the W-9 forms, and tracking invoices and payments.
- Finance supported the Endowment Trustee meeting in Chicago, where the investment manager selection took place.

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

- Continue the quality improvement efforts and best operating practices in Finance and accounting.
- Mentor, coach, and guide the new team members to be successful and continue the learning and cross training efforts.
- Develop and deliver additional Accounts Payable training and new Prophix Budget and Financial reporting software cloud-based training.
- Continue regular meetings with Unit Mangers and Division Executive Director and monitor financial trends, projections, and negative variances in the budget.
- Enhance and support a highly engaging budget by providing detailed guidance and training to Unit Managers on the FY 24 budget process. We have begun our improved budget process by replacing the budget system with a modern cloud-based one, which will be more efficient ad user-friendly. In addition, we are working on planning the budget process for FY 2024. Several meetings and pieces of training will be conducted leading up to the opening of the budget templates.
- Applying for a property tax exemption for the Washington office condominium would save $75,000 + annually and allow us to apply for a certificate of the error to recoup past payments.
- Continue working with Expense Reduction Analysts and Unit Managers to implement cost containment in all possible areas.

- Fully Implement a new grant revenue recognition and tracking update monthly rather than quarterly.
- Continue to participate in the work of the OAGW implementation task force.
- Continue to explore process improvements and cost savings.

GOVERNANCE OFFICE

Unit Manager: Sheryl Reyes

Unit Budget:

Governance (includes member leader budgets)

- Budgeted revenue and expense $0 / $387,802
- Actual revenue and expense $0 / $205,777

Executive Office

- Budgeted revenue and expense $162,428 / $1,373,025
- Actual revenue and expense $34,477 / $1,057,396

# of Staff: 4.5 Governance FTE

Revenue Stream(s) the Unit Supports:

☒ Conference Services

☒ Continuing Education

☒ Contributed Revenue

☒ Membership

☐ Publishing

Status Report on Pivot Strategy, Aligned Unit Goals:

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

A preliminary Board conversation occurred at their 2022 Fall Board Meeting during closed session to discuss strengthening ALA's relationship with the affiliates. The Avenue M survey data may help inform the discussion, and additional information will be provided as we benchmark ALA with other associations and their affiliate partnerships. An in-depth Board discussion will occur at the January LLX board meetings.

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

The ALA Governance Office is working in collaboration with partners and members to conduct the inaugural ALA Governance Institute (AGI) set for January 2023 during the Library Learning Experience (LLX) event. The goal for this institute is to better prepare member leaders for service with clearer expectations and deeper understanding of effective parliamentary practice, fiscal stewardship, and communication. Faculty has been secured and content is currently being developed. Additional leadership development resources will be created in partnership with the ALA parliamentarian, Training Orientation Leadership Development Committee, and the Council Orientation Committee for the AGI program.

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

Both the Award and Governance charettes have been initiated and overarching statements/goals identified to help inform team goals and support the pivot strategy. Every member of the Governance team is participating in a cross functional team (CFT) or as co-business owner in either the Awards or Governance CFT.

> Awards Standing Statement: ALA standardizes and centralizes guidelines, practices, and administration for awards—including book and media awards and grants/awards to individuals, libraries, schools, and other organizations—in order to better serve ALA members, publishers, ALA staff, and other stakeholders, while also building a foundation for increased impact.

> Governance Standing Statement: As associations continue to evolve, ALA will follow best governance practices to become agile and flexible in order to provide consistent member service and becomes a model association for others to follow.

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

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

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

- The 4th National Joint Conference of Librarians of Color (JCLC) was scheduled for October 5-9, 2022 in St. Pete Beach, FL, but due to Hurricane Ian, the conference has been rescheduled to February 8-12, 2023. Governance provides meeting planning support for JCLC, which takes a great amount of effort and coordination, even more so given the rescheduled conference.

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

<u>Virtual Volunteer Fair</u>

The inaugural Virtual Volunteer Fair was held on September 14, 2022. This engagement opportunity was held for ALA members to learn more about the different ALA volunteer opportunities organization wide from ALA and Council Committees to Divisions and Round Tables. Based on the evaluation survey, attendees rated this program 3.1 (out of a 5.0) scale, a slight decrease. Some format and schedule changes were implemented to address feedback from the previous year. ALA staff will continue to look at ways to improve the format and engagement for the event.

<u>Volunteer Application and Appointments</u>

The deadline for members to submit their ALA and Council Committee volunteer applications was September 30, 2022. We received a total of 682 application submissions. 344 of those are from unique individuals. Below is a breakdown of volunteer submissions and appointments since 2019. We continue to see an increase in volunteer applications from previous years. President-elect Drabinski will be working with committees and Governance staff in making appointments for the 2023-2024 committee year.
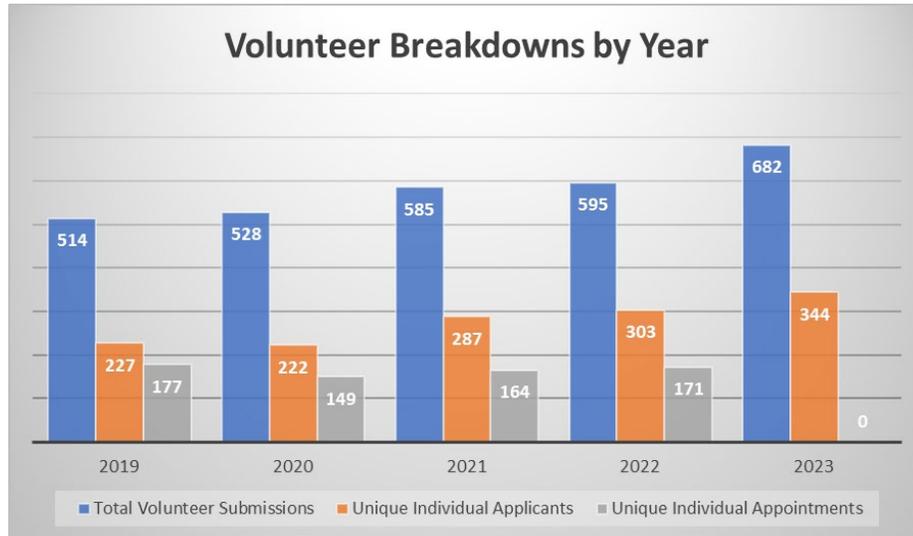
Fall Executive Board Meeting – October 21-23, 2022

The ALA Governance Staff hosted a hybrid ALA Executive Board Meetings at the ALA Headquarters Office. Coordination and execution of this meeting entailed significant work from Governance, IT, and building staff. ALA Executive Board members were pleased overall and appreciated the work to facilitate a productive meeting.

Describe the Most Impactful Unit Activities this Quarter:

ALA Bylaws Revision

The ALA Constitution and Bylaws Committee, in partnership with the ALA Governance Office and ALA Parliamentarian, is leading the effort to revise ALA Bylaws. The committee posted Draft 1 on September 1, 2022 and hosted a bylaws listening session on September 23, 2022 with 53 registrants. Draft 2 was released on November 4, 2022 and the bylaws' listening session was held on November 14, 2022 with 231 registrants. The final draft of the revised ALA bylaws will be released in January 2023 for Council deliberation and vote at the special session of Council.

ALA Nominating Committee

The ALA Nominating Committee announced presidential and councilor at-large candidates for the Spring 2023 election. Presidential candidates are Eric Suess and Cindy Hohl. There are 61 candidates who are running for a total of 36 at-large seats on the ALA Council. The petition deadline for these positions close December 31, 2022.

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

- Working with staff, committees and President-elect to finalize volunteer appointments for the 2023-2024 committee year
- Preparing for the upcoming LLX governance meetings scheduled for January 2023
- Working with our current election vendor to prepare for the spring 2023 web ballot, while transitioning to new election vendor for the 2023 nominations & 2024 elections.
- Preparing for the in-person Executive Board Candidates Forum in January 2023, as well as the Virtual Presidential Forum in February 2023

INFORMATION TECHNOLOGY (IT)

Unit Manager: Rebecca Headrick, Chief Information Technology Officer

Unit Budget:

- Budgeted Expense for Fiscal 2022 $3,582,065
- Actual Expense through August 2022 $2,709,785
    - Unfulfilled IT staff roles and project expenses incurred in FY23 relevant to the iMIS upgrade account for most of the difference from budget to actual expenditures in FY22.

# of Staff: 7

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 serve the Pivot Strategy as foundational to supporting and improving ALA operations. Many projects were started in FY2022 and are continuing into FY2023.

ALA Technology Projects:

1. **iMIS Membership System Upgrade**
   Completed on the weekend of November 4, 2022
2. **Upgrade Shibboleth Single Sign-On Software**
   Completed before the weekend of November 4, 2022
3. **Drupal 9 ala.org Website Upgrade and Redesign**
    The redesigned site will be launched at the end of November 2023
4. **Assist Membership with the implementation of in-person events in iMIS after the upgrade**
    Work with vendor to set up in-person events
5. **Continue to monitor revenue, membership goals, and pivot strategy**
    ALA Analytics project is underway to present pivot strategy key performance indicators and other essential organizational management dashboards by the end of Q3 FY23.

6. **Replace all staff laptops at headquarters**
   Rollout is underway
7. **Upgrade and move Financial Systems to the Cloud**
   GP Dynamics upgrade is complete, and Prophix Budgeting and Reporting System will move from an on-premises system to the cloud Software as a Service (SAAS) solution effective January 2023.
8. **Cloud Feasibility Assessment Study for remaining systems**
   Efforts are underway to inventory all systems and interconnectivity of services to develop a plan and identify solution providers to support the move from on-premises to cloud solutions. The Prophix-to-cloud SAAS move is an example of one initiative moving us in this direction.

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

ALA's new CITO joined the team in late September 2022 and is working with the IT Team, AEDs, Divisions, Offices, Unit leaders, and staff to better align IT projects to organizational priorities and improve IT operational practice. In addition, ALA must address some longstanding issues with technical debt resulting from the historical practice of expediting the delivery of applications and services that typically require refactoring later but never get addressed. With the CITO's leadership and support from ALA leadership and the ITAC Committee as advisors, we will develop an IT strategic plan to address some of our more pressing concerns and move toward our objective of becoming a best-in-class IT operation.

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

Major projects for FY23 will have significant organization-wide impacts. For example, we will launch the ALA Analytics platform for internal and external business intelligence to inform data-driven decision-making in support of moving toward a data-driven mindset and culture. Additionally, the ALA website update represents a significant opportunity to improve communication, enhance engagement, increase visibility and provide greater accessibility for ALA's most essential, public-facing resource.

Describe the Most Impactful Unit Activities this Quarter:

- Our new CITO has established relationships with AEDs, Divisions, Offices, Unit Managers, Staff, and ITAC leadership to identify short-term and long-term IT strategic goals that improve IT operational practice and best serve the ALA mission.
- We finalized our search for an IT Business Analyst who will join the IT team in January 2023. This essential IT team member will support the analysis and requirements development necessary for organization-wide application and process improvement.
- We successfully upgraded the Shibboleth Single Sign-On service, a system for securely connecting logged-in users to resources such as the ALA.org website, ALA Connect, and many other essential online services.
- We successfully upgraded the iMIS membership system, ALA's primary customer/member relationship management software. The upgrade allowed us to launch a new member/customer portal, *My ALA* (https://my.ala.org/), for logged-in users to manage their profile data. We also launched a new web-based staff portal for managing records in the iMIS database, a significant improvement in ease of access to secure database management.
- Many foundational tasks for the ala.org Drupal 9 Upgrade and Website Redesign project have been completed this quarter, and we are on target to launch in November 2023.
- Laptops long overdue for replacement are in the process of being released to all headquarters staff. As a result, ALA staff will have more reliable, high-performance equipment and access to better knowledge management

resources with the formal launch of Microsoft OneDrive for document management within this effort. We are also strengthening security with credential reset requirements for each new release.

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

- The GP Dynamics accounting system upgrade was completed on 12/15/2022, bringing it into compliance with update requirements and other essential patch releases required to support its secure functionality.
- A new IT customer service ticketing system will be launched on 12/20/2022 to manage internal IT support requests. We will also roll this platform out to other key ALA units later this fiscal year. Doing so will enable us to centralize and elevate our ability to serve staff, members, and customer needs as more teams adopt the new platform.
- The Prophix budgeting system upgrade to the cloud is underway and scheduled for a January 2023 launch.
- A cloud-based backup system for O365 is scheduled for release in January 2023
- Developments for the Drupal 9 Upgrade and Website Redesign project (scheduled to launch in November 2023) will be completed in this period, including content inventory and archive recommendations, wireframe development, and site navigation change recommendations.
- We will move to the execution phase of enabling the ALA Analytics platform, including defining baseline KPIs, data sources, and initial dashboards.
- Partner with a SQL Database Administration support vendor to maintain and update critical ALA database infrastructure and performance.
- ERA (Expense Reduction Analysts) --- IT Infrastructure Services and Expense Review partnership, identifying cost savings opportunities through existing vendor evaluations (ongoing).

INTERNATIONAL RELATIONS OFFICE

Unit Manager: Michael Dowling

Unit Budget:

- Budgeted revenue $35,000 /expenses $233,893 ($ -198,893)

# of Staff: 1.5

Revenue Stream(s) the Unit Supports:

☒Conference Services

☒Continuing Education

☒Contributed Revenue

☒Membership

☐Publishing

 Status Report on Pivot Strategy, Aligned Unit Goals:

Conference Services

CMO promoted LLX and Annual Conference to IFLA list and at Sharjah Conference, National Libraries Summit, and Guadalajara Book Fair. CMO recently met with Italian Trade Agency in Chicago, and they will be getting a booth for Annual.

Continuing Education

In November, CMO support the 9th Sharjah International Library Conference which had 250 registrants from twelve countries. ALA President Lessa Pelayo-Lozada keynoted the conference. The 2nd two-day National Libraries Summit held ahead of the Sharjah Conference attracted directors and senior leaders from 30 countries.

ALA-FIL Free Pass Program to Guadalajara Book Fair at end of November bounced back with 129 ALA members traveling to the Book Fair to review and purchase Spanish language materials for their communities. President Pelayo-Lozada represented ALA.

IRO with IRRT provided two webinars this quarter.

"Use of reflective practice as a tool for storytelling and demonstrating impact through the framework of the UN Sustainable Development Goals" had 246 registrants

"Engaging in LIS Practice: Impact of COVID-19 on Research, Teaching, and Mentorship" had 149 registrants

Contributed Revenue

ALA's Ukraine Library Relief Fund raised another $7,000 from September. IRO also received another donation of $7,500 for the ALA Disaster Relief Fund for another year of support for two public libraries in Haiti.

Membership

Met with Membership team to create strategy to recruit past members and new members with new lower international membership rate. Promoted at Sharjah Conference and National Libraries Summit.

IRO and IRC worked with other ALA units to recruit and bring forward ALA members nominations to serve on IFLA committees for 2023-2027.

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

- New international membership rate presents opportunity for increased recruitment

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

- 250 members and non-members at Sharjah International Library Conference

- 50 leaders from 30 national libraries and Nationals Libraries Summit

- 129 members supported at Guadalajara Book Fair

- Nearly 400 international members and non-members through webinars.

Describe the Most Impactful Unit Activities this Quarter:

- 9th Sharjah Conference continued ALA's reach into the Middle East region.
- National Libraries Summit engaged more national libraries and ALA's connection with them.

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

- Recruitment of new international members in collaboration with Membership.
- Complete nomination of ALA members for IFLA Governing Board, Sections, and Committees.
- Promote Annual Conference to ALA international members and non-members.

MEMBER RELATIONS & SERVICES (MRS)

Unit Manager: Melissa Walling, MBA, CAE – Director

Unit Budget: *for one month ending, September, 2022*

- Budgeted revenue and expense: $4,877,900/ ($105,000)
- Actual revenue and expense $390,292/ ($0)

# of Staff: 9.5

Revenue Stream(s) the Unit Supports:

☒Continuing Education

☒Membership

Status Report on Pivot Strategy, Aligned Unit Goals:

ALA membership counts ended the fiscal year at 49,705. This was a projected decline due to the challenges of the pandemic and we ended the year flat to FY21 and an 8% decline from FY20. As of January, our counts are back over 50,000 and are expected to climb as we head into the spring.

ALA's rebound in membership counts will take time and is reflective of the number of furloughs and layoffs that the LIS community has absorbed during the protracted pandemic. With 2/3 of ALA members paying dues from their own pocket, ALA dues revenue is sensitive to sustained high inflation rates as well.

Division Membership counts ended the year at 39,796 and Round Table Membership counts at 17,883. This slight year over year decrease in Division Membership and slight increase in Round Table Membership follows historical trends. Increasing engagement within Divisions and Round Tables is key to supporting membership retention.
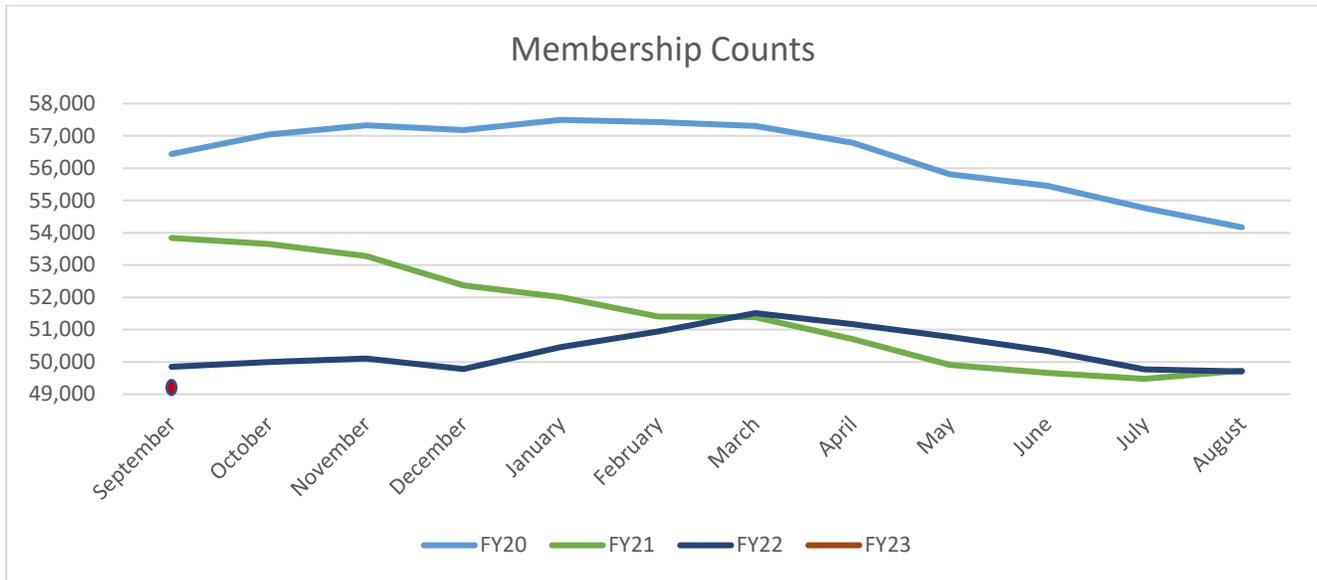
The membership office also supports revenue generation for the organization beyond membership. This includes support for subscription sales and support of e-learning students. This internal customer service is a key role of the MRS unit and directly contributes to the pivot strategy.

Pivot Plan Membership Goals:

	FY22 Final	FY22 Goal	Variance	FY25 Target
ALA Market Share*	14%	15%	(1%)	20%
Division Share of Membership	55%	65%	(9%)	75%

**The market data was last updated in 2018 – and market data will shift over time:*
https://www.ala.org/tools/libfactsheets/alalibraryfactsheet02

Membership Counts

Legend: FY20, FY21, FY22, FY23

Focus Area	Impact (FY22 vs. FY21)
Increasing Library Worker Memberships	Increase in Regular Members – 5.7% Increase in Support Staff Members – 8.6%
Recapturing Lost Members from the Pandemic	Increase in Reinstatements for Personal Members – 63% Increase in Reinstatements for Org. Members – 49%
Executing Complete and Timely Renewal Campaigns	Increase in Retention Rate for Personal Members - 4% Increase in Retention Rate for Corporate Members - 3%
Completing onboarding program for new members	23,370 emails delivered throughout campaign Open rates of 48-54% Click thru rates of 14-16% 4 virtual orientations

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

Membership Recruitment: We continue to have success with quarterly email campaigns to select lapsed members, each with a key, timely subject. These campaigns are showing high open and click rates resulting in the recapture of many lapsed members.

Automated email campaigns are starting to show success. Using technology, we are able to create membership campaigns that can remain active without staff resources needed for "one-off" emails. Our first true drip campaign will launch in early 2023. 2023 recruitment goals include pairing recruitment campaigns more closely with key ALA programs and issues and defining new audiences with the help of leadership. We are already showing increased new member rates than last year.

New members
4,843
Last year's count: 3,161

Student Engagement: A multi-year effort is underway with Membership and Chapter Relations to deepen engagement with LIS students. This effort includes online engagement through Connect as well as virtual events for networking and education. We appreciate the ALA Executive Board's investment in their time and of offering to connect with LIS programs in their networks or geographic vicinity. We are eager to track and report on those results for this year.

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

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

Division and Round Table Engagement: At the end of FY22, overall participation in Divisions and Round Tables reflects:

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

In comparison to FY21, we have had a slight increase in the number of members who are not within a Division or a Round Table. This is an opportunity to highlight Division and Round Table engagement as we know that members who have found a community within ALA are more likely to renew. The large number of Student Members with only an ALA membership is a focus as well. This is partially because the Joint Student Membership process is hosted outside of our main dues e-commerce platform and Joint Student Members cannot join any groups when they join ALA. This is on the list of IT improvements.

ALA Connect Platform:

The implementation of the new Code of Conduct continues to have positive implications on important ratios and key metrics (**Email Open Rates**, and the **Average Replies/Threads Ratio**) that we use to indicate the value of Connect. In October and November, we saw a slight increase in another key metric that we measure. the **Unsubscribed Rate**. The Unsubscribed Rate measures the users unsubscribing from daily digests.

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

- The ALA Connect Community continues to be a primary benefit for members. We expected an increased presence in Connect due to the end of the summer months. We had hoped that the biggest upward trend that we have been monitoring, the **Average Replies/Thread** Ratio, would continue at its pace. In August, the **Average Replies/Thread Ratio** was **.96**. That was an upward trend of **+18.9%** since May. The average replies in all communities from September until the first weeks of December have leveled off, with an average of **.86** during that span. During this same period, the **Average Replies/Threads** in the ALA Members Community is **1.34 Average Replies/Threads**.

Average Replies Per Thread
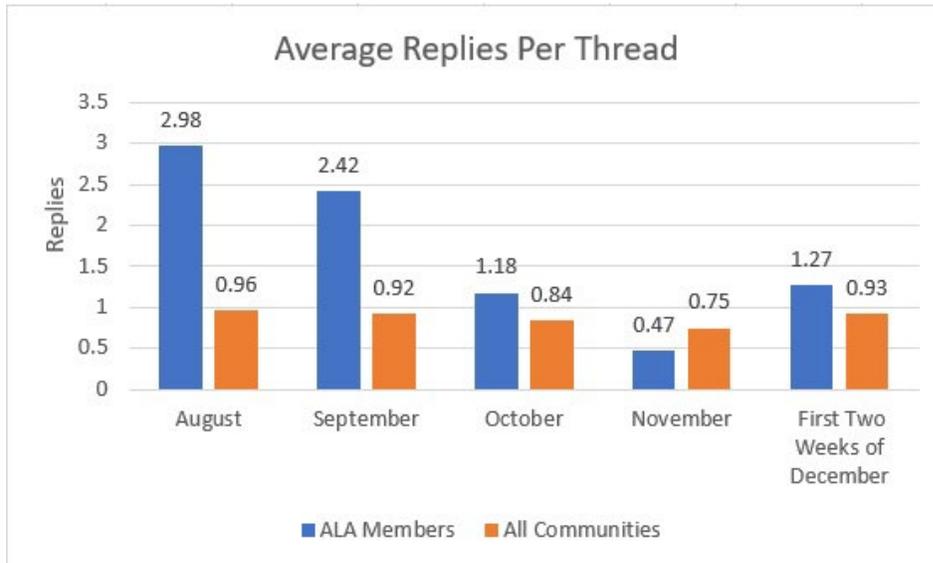
- We continue to see a steady trend of users engaging with ALA Connect as a communication tool and knowledge-sharing tool. We have been using the email **open rate** and library contributors to monitor trends. Over the last quarter, ALA Connect has averaged **241** library contributors and a **43%** email open rate.

- We have **54,697** Active Users in ALA Connect. From June to September, we had **2,715** first-time logins. We continue to use Passive Marketing and automations are being used to promote the benefits of membership to Non-members. We continue to explore avenues to increase the value of ALA Connect for our members.

Describe the Most Impactful Unit Activities this Quarter:

Dues Standardization: As a result of the recent action taken by Council for Round Table standardization of bylaws and dues, the MRS team has worked closely with the Round Table Coordinating Assembly Co-Chairs and Danielle Ponton, Program Manager, ALA Round Table on adoption and implementation. This effort has concluded at the Round Table level and was shared with the ALA Membership Committee for review and adoption. The Membership Committee will present an action item in January 2023 to Council.

Avenue M Membership Model Work and Membership Survey: ALA has re-engaging Avenue M as a partner in conducting a membership survey as well as updating the membership model analysis. This work is important as the employment landscape has shifted since 2018 when the last survey was conducted. The all-member survey was sent and closed with 6,921 responses, an 87% completion rate, 12% response rate and a margin of error of +/-1% at the 95% confidence level. The results of this survey will be shared in early 2023 and this will delay the overall implementation of the new model to FY25.

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

Customer Service: We are continually thinking about how to improve the level of customer service that we provide. This is the busy season for membership and subscription renewals, so our current focus is on external customer service and meeting expected response times to members and customers. In FY23, we will invest in a customer service technology to better track and measure the customer experience in FY23. This tool will assist in tracking and streamlining our email operations that we will launch in Spring, 2023 so will start to lay the groundwork this quarter.

Membership Recruitment: In FY23, membership volunteers and staff have a strong commitment to recruitment. Here are some planned tactics:

- Developing a peer-to-peer recruitment program to provide members with talking points to encourage colleagues to join ALA;
- Executing ongoing quarterly campaigns to recapture lapsed members by promoting ALA mission impact and professional development opportunities;
- Automating campaign to non-members who register for events on the Learning Management System;
- Encouraging members not in a Division or Round Table to increase their engagement by joining;
- Converting graduating Students to Regular Members with increased communications and networking opportunities;
- Showcasing membership and professional development opportunities on Connect to non-members.

OFFICE FOR ACCREDITATION (OA)

Unit Manager: Karen O'Brien

Unit Budget:

Budgeted revenue and expense YTD Nov 22: Revenue $86,716 Expense $56,417
Actual revenue and expense YTD Nov 22: Revenue $81,503 Expense $50,390

# of Staff: 2

Revenue Stream(s) the Unit Supports:

☒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_2021_1.xlsx

- Revised Standards draft second proposal out for comment https://www.ala.org/aboutala/revision-2015-ala-standards-accreditation-master%E2%80%99s-programs-library-and-information-studies 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:

Closing fall comprehensive reviews and preparing the Committee on Accreditation for its Winter Meeting Jan 19-20.

Managing 31 programs currently in the comprehensive review cycle.

# of Members/non-members/other stakeholders reached during quarter (for all Units): ~850

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

Fall reviews engaged an estimated 680 stakeholders, ALA reviewers, volunteers, leaders, and LIS program personnel.

Describe the Most Impactful Unit Activities this Quarter:

Comprehensive program reviews and gathering of feedback on the Standards revision.

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

- Virtual reviewer training in March and in-person in June at ALA Annual Conf (AC) while preparing for the Standards revision adoption by ALA Council

- CoA meeting at AC to close comprehensive reviews using an in-person & virtual hybrid approach

OFFICE FOR DIVERSITY, LITERACY, AND OUTREACH SERVICES (ODLOS)

Unit Manager: Kevin D. Strowder

Unit Budget: *For FY23, one month September*
- Budgeted revenue and expense: $16,000 / $26,163
- Actual revenue and expense: $0 / ($28,441)

# of Staff: 2 Full-time Employees & 1 Independent Contractor

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.*

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

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

Capacity within the office has created a significant delay in the evaluation and implementation of our Continuing education programs. Until more staff are brought on, these opportunities are not being extended to the field.

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

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

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

ASGLCA Dissolution & ODLOS Standards
Member-driven work because of ASGLCA's dissolution has begun to take form and produce great results under the direction of ODLOS. Aside from offering support as Staff Liaison's to the six Interest Groups, there are two distinct projects that have called for a great deal of staff engagement.

1. **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 for this work, ALA Staff, and external partners held a *Standards Peer Review* session in December at The University of Chicago to gather insight. The Drafting committee are in the final stages of development and getting feedback from stakeholders. To ensure this work is in alignment with the other Standards that ALA oversees, ODLOS staff is working with Governance to ensure we follow all protocols to get acknowledgement, approval, and dissemination of this document by ALA Council and Executive Board. We hope to share more specific updates at LLX 2023 that include formal request submitted by the ALA Committee on Diversity.

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

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

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

Members reached during quarter (committees, EDI Assembly, RTs, Interest Groups) = **4, 378**

Combined members and non-members reached during quarter = **10,725**

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

EDI Assembly & ODLOS Advisory Committee

OLDOS's EDI Assembly maintain 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. Managing both the committee and assembly after welcoming the ODLOS Advisory Co-chair and three new members-at-large have proven to be beneficial. The group has been able to give attention to areas that were neglected last year such as the Diversity Poster Fair selection process at Annual, and the Jean E. Coleman Lecture Series.

Ethnic Multicultural Information Exchange Round Table (EMIERT)

EMIERT is in the process of creating a new Award under the Jewish Information Committee. They are also working to create more programing focused on multicultural work within the library community. We have seen a great deal of investment come to surface with the change in leadership that invites more collaboration and buy-in from their Executive Board. Education programs are at the forefront of their new ideas that will bring visibility to the group and leverage the chance to recruit more members given the recent tradition of CSK to Round Table status as CSKBART.

Coretta Scott King Book Awards Round Table

The adjustment period for CSKBART brings about new challenges that may call for a revision of systems created to support their group. ODLOS Staff are working with them to navigate the Bylaws process, member recruitment, budget strategy, and Round Table morale.

Describe the Most Impactful Unit Activities this Quarter:

Accessibility Program Manager

ODLOS onboarded the Program Manager, Accessibility Services this quarter. This role now allows for dedicated attention to the Interest Groups and Accessibility programming. We are getting this new employee acclimated to the association, but they have been able to begin work around the major projects. This includes the ALA Accessibility Strategy and overseeing the Standards project with the Library of Congress.

Key Literacy Initiatives

The ALA Committee on Literacy and Literacy Assembly continue to build out their webinar series. After a successful experience in October 2022, they have identified four more themes to highlight. The next event is taking place in March 2023. Also, by that time, the committee will have finalized the RFP and strategy for inviting folks to join as a consultant for the long-term plan.

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

Social Responsibilities Round Table

With the support of ODLOS Staff, members of SRRT hosted a full day Homelessness Summit which brought together 120 attendees at each of the six sessions that took place on that day. The content delivery was spearheaded by remembers and leadership from various partnering organizations.

https://www.ala.org/rt/srrt/2022homelessness_summit

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

ALA Committee on Diversity

Over the last couple of months, the ALA Committee on Diversity has been reviewing their portfolio of projects for the year. In addition to developing content to educate the field and create the standards for implementing equitable practices in librarianship, the Executive Board has been approached to oversee and maintain two ongoing initiatives under the request from Council. By identifying a pathway for this work to live in the committee, ALA/ODLOS hopes to see more buy-in from members to realize these proficiencies and support the resolution being put forth.

1. **ALA Working Group to Condemn White Supremacy and Fascism**
   This member group has come together to implement crucial work and received feedback from Council during the 2022 ALA Annual Conference. Recent meetings have centered around the revitalization of this resolution and will soon begin to form in the coming months. New leadership is being identified by the Committee on Diversity in hopes of developing a sustainability plan for

2. **Building Cultural Proficiencies for Racial Equity Framework**
   With approval from the Board of Directors and the four partner organizations, the American Library Association, Association of College & Research Libraries, Association of Research Libraries, and Public Library Association, the Building Cultural Proficiencies for Racial Equity Framework Task Force released *Cultural Proficiencies for Racial Equity: A Framework.*

OFFICE FOR HUMAN RESOURCE DEVELOPMENT & RECRUITMENT (HRDR)

Unit Manager: Lorelle Swader, AED

Unit Budget:

- Budgeted revenue ($ 51,000) and expense ($ 216,675)
- Actual revenue ($ 28,402) and expense ($222,422)

# 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 7% below their projections for membership.

Increase Revenue by 10% over Expenses

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

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

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

# of Members (for Divisions): NMRT (1221)

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

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

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

Describe the Most Impactful Unit Activities this Quarter

The ALA-Wide Scholarship Clearinghouse application process went live in September. The newest class of Emerging Leaders has been selected and will begin their training workshops during LLX. (There are 46 in all)

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

- The Committee on Education (COE) has made final revisions to the Core Competencies for the generalist librarian, and it has been forwarded to Council for adoption during LLX.
- There will not be a face to face JobLIST Placement Center in New Orleans during LLX. There will be one during the Annual Conference in Chicago.

OFFICE FOR INTELLECTUAL FREEDOM (OIF)

Unit Manager: Deborah Caldwell-Stone

Unit Budget:

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

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

Revenue Stream(s) the Unit Supports:

☒Continuing Education

☒Contributed Revenue

☒Membership

☒Publishing

Status Report on Pivot Strategy, Aligned Unit Goals:

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

To grow revenues in FY23 and equip members with actionable knowledge on defending access to information, OIF is working with ALA's continuing education unit and other ALA divisions and affiliates to expand continuing education programming. It is also pursuing opportunities to generate revenue through the sale of books, products, and digital resources and support contributed revenue generation. Additionally, staff is initiating an evaluation of our challenge reporting and challenge support tools and OIF's overall programs and services, with the goal of improving the member experience and 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 the staff of the Office for Intellectual Freedom, as the volume of challenges reported to OIF remains at a record high number. Between January 1 and November 30, 2022, librarians, educators, and members of the public reported 1,059 attempts to ban or restrict library resources to the Office for Intellectual Freedom; these challenges targeted 2,081 unique titles. A notable trend are demands by political advocacy groups to remove multiple titles from libraries all at once, based on lists pulled from social media posts shared among political advocacy groups.
- I am pleased to report that we have contracted with Eric Stroshane, MLIS, to bolster our efforts to provide challenge support to members. In addition, Eric will be managing the banned books database, aid in reporting on the activities of the office, and continue his work as news editor for the OIF Blog and the *Journal of Intellectual Freedom and Privacy*. Eric previously worked at the North Dakota State Library and the Carnegie Library of Pittsburgh and is a past president of the Mountain Plains Library Association.
- OIF and PPA's State and Local Advocacy Office continue to work in partnership on Unite Against Book Bans, ALA's grassroots advocacy initiative. To date, 65 national partners and 53 state and local partners have joined with 10,400 individual advocates to oppose book censorship in communities and in the United States. In addition to ongoing advocacy and activation via email and social media, UABB is now offering support to local library supporters fighting censorship in their communities.
- The ongoing coordinated political campaign to censor and restrict library resources via book challenges, legislation, and legal actions is being reflected in a growing number of prefiled bills in state legislatures intended to restrict or ban access to books and other library resources. OIF staff continues to work in partnership with the Public Policy & Advocacy Office to assist state chapters addressing adverse state legislation by identifying and advising on substantive legal issues and assisting with advocacy.

Member Outreach and Engagement (09/01/22 – 11/30/22):

From September 1, 2022, to November 30, 2022, OIF tracked 392 unique censorship incidents. Support was requested and provided by OIF staff in 104 of those cases. Additionally, OIF received 31 requests for support unrelated to specific challenges to materials, displays, or programs.

From December 1 to December 15, OIF received 54 reports documenting attempted restriction or removal of library resources.

Books & Graphic Novels	330

Programs	14
Displays & Exhibits	22
Other Challenged Resources (student publications, reading lists, pamphlets, First Amendment Audits, online resources, artwork)	26

Notable **Challenges:**

- Missouri SB 775 went into effect on August 28, making it a class A misdemeanor for someone affiliated with a public or private school to provide sexually explicit material to students while acting in their official capacity. The bill is constrained to "pictorial, three-dimensional, or visual depictions" and does not apply to "works of art, when taken as a whole, that have serious artistic significance, or works of anthropological significance, or materials used in science courses." Despite this, school districts throughout Missouri began culling their graphic novel collections.

- The chair of the Escambia County School Board and the Language Arts department chair of Northview High School and challenged 113 titles in the district. The chair asked the superintendent to "quarantine" all challenged items until they could be reviewed. Specific complaints included "LGBTQ themes," "political gay agenda," "transgenderism," "anti-cop agenda," "biased against males," "marginalizes White people," and "factual errors related to slavery."

- Increasingly, efforts to close or defund public libraries are being made when LGBTQIA+ materials are challenged and retained as a result of adherence to reconsideration processes and policies. Patmos, Michigan; Pottawatomie, Kansas; League City, Texas; Ephrata, Pennsylvania; and Jonesboro, Arkansas are all examples of this tactic targeting community library services.

Social Media: September 1, 2022 – November 30, 2022

TWITTER							
Profile	Followers	Net Follower Growth	Published Posts	Impressions	Engagements	Post Link Clicks	Engagement Rate Per Impression
@BannedBooksWeek	18,739	967	68	194,010	4,640	527	2.4%
@FTRF	7,117	-50	32	26,025	1,084	173	4.2%
@IFRT_ALA	2,042	9	114	58,842	2,367	350	4%
@OIF	15,921	-185	69	140,029	4,278	756	3.1%
@privacyala	4,159	-102	0	-	-	-	-
@UABookBans	2,542	665	146	288,293	8,987	1,173	3.1%
Total (All Feeds)	**50,520**	**1,304**	**429**	**707,199**	**21,356**	**2,979**	**3%**
Percent Change Over Previous Quarter	**+2.6%**	**-36.7%**	**+52.1%**	**+17%**	**+26.6%**	**+14.4%**	**+8.3%**

FACEBOOK							
Page	Fans	Net Page Likes	Published Posts	Impressions	Engagements	Post Link Clicks	Engagement Rate Per Impression
OIF	8,780	64	18	19,664	620	112	3.2%
BBW	151,707	741	29	180,422	10,971	1,039	6.1%
FTRF	-	-	0	-	0	0	-
IFRT	-	-	0	-	0	0	-
UABB	1,422	445	82	47,861	3,244	444	6.8%
Total (All FB Pages)	**161,909**	**1,250**	**129**	**247,947**	**14,835**	**1,595**	**6%**

Percent Change Over Previous Quarter	+0.5%	+427.4%	+46.6%	-50.5%	+305.3	+15.1%	+719.1%

Intellectual Freedom News: 2992 primary subscribers reached weekly (72 new subscribers).

Additional Advocacy, Education and Outreach:

Director Deborah Caldwell-Stone - Presentations

- Young Adult Library Services Association, webinar, 09/08/2022.
- Tocker Foundation (Texas libraries), webinar, 09/15/2022.
- Ohio Library Council Annual Conference, "Books Under Fire," "First Amendment Audits," 09/28-29, 2022
- The Mark Twain House & Museum, "Fighting Book Banning and Censorship in Our Libraries," 9/22/2022
- American Association of School Librarians (AASL) Town Hall, panelist, 10/12/2022
- Mississippi Library Association Annual Conference, closing keynote, 0/14/2022
- Riverside County Law library, webinar, 10/20/2022
- MetaMetrics, webinar, 10/27/2022
- Charleston Conference, "Long Arm of the Law: Book Censorship," 11/04/2022
- League of Women Voters of Diablo Valley (CA)   11/17/2022

Joyce McIntosh, Assistant Program Director, Freedom to Read Foundation - Presentations

- Elmhurst Public Library 9/7/2022
- Glenview Public Library 9/20/2022
- Pulaski County Public Library (Indiana)   9/28/2022
- Illinois Library Association Annual Conference, 10/24/2022
- Wisconsin Library Association- Intellectual Freedom Special Interest Group 10/24/2022
- Association of Illinois School Library Educators (AISLE)   11/3/2022
- Texas Woman's University's ALA student chapter 11/4/2022
- Emporia State University (SLIM) 11/15/2022
- Ephrata Public Library (Lancaster, PA)   12/5/2022
- Lewis University 12/6/2022

Describe the Most Impactful Unit Activities this Quarter:

"First Amendment and Libraries," ALA e-Course offered in partnership with ALA Continuing Education (September 2022). Theresa Chmara, General Counsel, Freedom to Read Foundation, taught a four-week course for CE credit exploring how the First Amendment governs the operation of publicly funded libraries to nearly 100 librarians.

Banned Books Week:

OIF offered four virtual programs during Banned Books Week:
- **Free Expression for Young Adults,** with authors Jarrett Dapier, Ryan Estrada, Varian Johnson, and educator Donalyn Miller;
- **How to Fight Book Bans in Your Community,** with Cameron Samuels; Jen Cousins and Stephana Ferrell, and Carolyn Foote;
- **Practical Strategies for Defending Books in Your Library**, with librarians Moni Barrette, Jamie Gregory, Val Nye, and Jack Phoenix.
- **A Conversation with Jennifer Niven and Pat Scales,** with author Jennifer Niven and intellectual freedom expert Pat Scales.
- OIF also partnered with the Banned Books Week Coalition and Unite Against Book Bans on a series of Instagram stories featuring authors and others reading from their favorite banned books.
- OIF and the Banned Books Week Coalition also endorsed U.S. Representative Jamie Raskin's Banned Books Week Resolution.

Banned Books Week Media Engagement:

- Between September 1, and October 9, there were about 4,500 mentions of Banned Books Week and ALA, with a reach of 258.2 million people.

- Increased national media coverage over previous years, including items from CNN, MSNBC, NBC News, ABC News, USA Today, The New York Times, The Washington Post, The Guardian, The Atlantic, HuffPo, Vice, Salon, AP, and Reuters, with interviews featuring ALA president Lessa Kanani'opua Pelayo-Lozada, IFC Chair Lesliediana Jones, AASL president Kathy Lester.

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

"Defending Intellectual Freedom: Facing Challenges and Fighting Back," a series of three webinars addressing today's most challenging issues facing libraries across the country. Co-sponsored with ALA Continuing Education and the Freedom to Read Foundation:
- "Navigating Book Challenges in Rural America," Wednesday, January 4, 2023
- "Reproductive Health and Libraries: Navigating the New Information Landscape," Wednesday, January 11, 2023
- "Dealing with Challenges, Misinformation, and Disinformation About Resources for Children and Young Adults," Wednesday, January 18, 2023

"Book Bans, Libraries, and the Law: Standing Up to Library Censorship in Louisiana and Beyond," Saturday, January 28, 2022 at LibLearnX in New Orleans. Co-sponsored by Unite Against Book Bans, the Tulane Law First Amendment Clinic, and the Freedom to Read Foundation.

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 (incl. $788,269 OH)
- Actual revenue and expense: August actuals: $3,773,730revenue/expense $2,946,627 (incl. $827,103 OH)

 # Of Staff: 13.5

Revenue Stream(s) the Unit Supports:

☒Conference Services

☒Continuing Education

☒Contributed Revenue

☒Membership

☒Publishing

☒Data, Research & Design

Status Report on Pivot Strategy, Aligned Unit Goals:

In FY22 PLA had 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 year end, PLA membership dues at $559,633, ended 20% ahead of the budgeted $467,500. This is the result of the PLA National conference year "bump" in membership renewals. PLA feels that a two-year renewal option will effectively retain many of these renewals over our division's "non-conference year," and we are hopeful that this is the near future for ALA.

PLA's Web CE revenue of $25,000 fell below budget by 30%. This is largely due to our decision to suspend production of new Web CE in order to focus diminished staff resources on PLA 2022 National Conference production, including the expanded Virtual Conference. New Web CE resumed production following the National Conference.

We feel the decision to focus our diminished staff on conference efforts paid off. A total of 6,005 librarians, exhibitors, speakers, guests, and others registered for the 2022 PLA National Conference, 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. Despite additional pandemic related costs, and smaller numbers of exhibitors and participants than at pre-pandemic conferences, the conference netted $851,748 and contributed $788,269 in overhead to ALA.

As we move forward in 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.

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

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

- As libraries continue to confront unprecedented attacks on the freedom to read, PLA participates in the cross-unit crisis response team, provides support to the Office for Intellectual Freedom, reaches out to individual public library leaders experiencing attacks, and shares resources and information with allies in the field.

- PLA Staff is very involved in supporting ALA Finance's move through an accelerated close/audit/budgeting process. Having up to date financials will be a great improvement in PLA's ability to steward its resources and serve members, however the compressed timelines require a great deal of staff time and make it very challenging to provide PLA member leaders with the financial review access and time that they require.

- 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. More than 1,100 libraries participated in the PLA 2022 Public Library Services for Strong Communities survey - a 12% response rate. These contributions are essential to providing actionable data for the field on public library partnerships, programs, services, and facilities. The 2022 survey results will be published in summer 2023. The survey is the third in a rotating series of three national surveys exploring public library roles, services, and resources to provide actionable data for decision-making and advocacy.

 # Of Members (for Divisions): through most recent membership report: 8,330

 # Of Members/non-members/other stakeholders reached during quarter (for all Units): PLA: via enews and other targeted emails, 17,362 average recipients with a 18% open rate (members and stakeholders) +5,701 (webinar registrants) +374 (PL magazine subscribers) + 170 (Digital Literacy Incentive recipients)

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

In FY23Q1 PLA hosted eight webinars: five free webinars, including the Spotlight on Safety town hall, as well as three paid webinars on topics such as accessibility and leadership. A total of 5,701 registrants and 2,689 attendees engaged in these events. View the recording here:
https://www.ala.org/pla/education/onlinelearning/webinars/ondemand/spotlight

Describe the Most Impactful Unit Activities this Quarter:

- The free PLA town hall event, Spotlight on Safety: Addressing Threats in Public Libraries, drew 2,789 registrants and 1,496 attendees for the live event on November 30. The panel featured PLA president Maria McCauley, senior counsel to the director for the US Department of Justice Justin Lock, director of the Fort Worth (Texas) Public Library Manya Shorr, library social worker with San Francisco (Calif.) Public Library Leah Esguerra, and director of security at Mid-Continent Public Library (Independence, Mo.) Dustin Koopman. At the beginning of the town hall, 28% of attendees reported feeling connected to resources and support to manage the emotional impact of being on the receiving end of threatening behavior; this number rose to 57% in the post-event evaluation.
- PLA published the 2021 Public Library Staff and Diversity Survey report in August. Since then, the report has had 601 unique downloads. This national survey updates information on beginning librarian and library director salaries; documents traditional and emerging staff roles; explores staff diversity, recruitment, and retention efforts; and captures information about public library equity, diversity, and inclusion (EDI) goals and activities. The survey is the second in a rotating series of three national surveys exploring public library roles, services, and resources to provide actionable data for decision-making and advocacy.
- 154 libraries were awarded funds as part of the "PLA Digital Literacy Workshop Incentive, supported by AT&T." This program supports public libraries in promoting and conducting Digital Learn workshops which were created and updated in conjunction with AT&T. So far over six hundred workshops have been held and over two thousand learners reached. Libraries have been partnering with their local communities to reach older adults, English language learners and other groups, online and in person. These workshops focus on basic digital skilling and are offered in English and Spanish. To meet the needs of their community one library is using funds to offer workshops in Gujarati and Hindi. This incentive program will continue into 2023 and we anticipate more translations. All resources developed in additional languages will become part of the free Digital Learn website.
- In October, The PLA Board of Directors convened for a hybrid meeting, in-person at the ALA Chicago Headquarters. The meeting included a ½ day retreat to advance the new PLA Strategic Plan.

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

- Develop and deploy materials and training to help library patrons access Affordable Connectivity Program benefits.
- Planning for the PLA 2024 National Conference in Columbus, OH
- Data analysis of the **2022 Public Library Services for Strong Communities Survey responses.**
- PLA staff will focus on strategies and tactics for its 2022-26 strategic plan implementation through a series of virtual and in-person planning discussions, and implementation of processes to foster EDISJ
- Work to develop the FY24 budget.
- PLA Executive director is an active member of the Operating Agreement Implementation Task Force, its working subgroup, as well as the counterpart Internal Staff Operations Working Group.

PUBLIC POLICY AND ADVOCACY (PPA)

Unit Manager: Alan Inouye

Unit Budgets for All of FY22:

	Budget	Reported Actuals	Variances	Variances after Reversing Reported Attrition
Unit 150:	839,753	753,295	86,458	33,371
Unit 151:	1,900,461	1,796,458	104,003	(11,367)
Totals:	2,740,214	2,549,753	190,461	22,004

# of Staff: 15.75 FTE

Revenue Stream(s) the Unit Supports:

☒Conference Services

☒Membership

Status Report on Pivot Strategy, Aligned Unit Goals:

- Increased coordination/collaboration with offices and divisions
    - AASL – coordinated on response to introduction and subsequent plans of the Right to Read Act
    - OIF and CMO – collaborate extensively on Unite Against Book Bans campaign
    - All ALA divisions – Submitted advocacy and initiative content for social media, blogs and other digital comms to divisions
    - COL – hosted an onsite strategic planning retreat for ALA's Committee on Legislation
    - ALA Policy Corps – hosted the fourth cohort of advocates with a deep and sustained knowledge of policy and advocacy
- To advance policies and legislation that build capacity of libraries to provide equitable library services, especially to underrepresented groups, advocated directly and in coalition for:
    - #FundLibraries campaign: Mobilized grassroots for proposed library construction and overall library funding in 2023 appropriations bill
    - The Right to Read Act
    - Adult Education WORKS Act
    - FCC's ACP Outreach Grants
    - Against: KOSA

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

- Access to information (Unite Against Book Bans): Working with OIF, PPA staff are supporting state associations and local libraries around the country to provide guidance on strategy, media relations and advocate mobilization in resisting attempts to ban books and censor library professionals.
- Digital equity: Advocacy for NTIA grant funding on broadband and digital equity continues with the release of "Leverage Libraries to Achieve Digital Equity for All." PPA continues to promote the FCC's outreach grants for

libraries to receive funding for promoting participation in the Affordable Connectivity Program, especially in underserved areas. PPA held an Instagram Live event led by ALA President Pelayo-Lozada and featuring Liz Gabbitas from the Utah State Library and Evan Marwell from EducationSuperHighway.

- Library funding: As the government has been operating on a continuing resolution since the beginning of FY 2023, PPA has been mobilizing advocates, particularly in strategic districts and states, to push for three things in the spending bill:
  - $201 million for the Library Services and Technology Act
  - $20 million for library and museum facilities to be implemented by the Institute of Museum and Library Services, and
  - $32 million for the Innovative Approaches to Literacy program for school libraries
- State legislation involving access to information: see separate report on collaboration with OIF and CMO on the uptick in banned books and supporting library staff facing threats

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

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

- ALA members and leaders, reached via email, ALA Connect and ALA Connect Live
- Scores of posts on PPA (@LibraryPolicy), ALA, ALA division (incl. AASL, ACRL, PLA, UFL) and coalition partner (Unite Against Book Bans) social media accounts and blogs
- Participants in Instagram Live event on ACP Outreach Grant funding opportunities
- House and Senate members and/or staff from offices on Capitol Hill
- Library associations of states involved in banned books and state e-books legislative campaigns
- Library trade press and other media via press releases and direct outreach
- Members of our national policy coalitions
- Attendees at the following events, where PPA staff presented:
  - Committee on Education Funding Hill Day (July)
  - Government Executive event, *Uninterrupted Learning: Ensuring Access to Essential Technology* (Aug. 29)
  - Digital Public Library of America conference (Sept. 27)
  - Minitex Advocacy Academy (Sept. 27)
  - Annual West Virginia Library Association conference (Oct. 5-7)
  - Library Journal Directors' Summit (Dec. 1)
  - Osher Lifelong Learning class on banned books (Dec. 6)

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

Anticipating the severe attacks on libraries from book banners to intensify in 2023 in general, bolstered by adverse developments in the House of Representatives. Attempting to strengthen legal and policy resources at the federal, state, and local levels, based on available resources. Also planning to increase leverage of the ALA Policy Corps and other member-leaders on the book banning and censorship issue, both defensively and offensively.

Other new attacks are expected, notably from the upcoming Congressional investigation of Covid funding—libraries received hundreds of millions of dollars, which may be scrutinized.

Describe the Most Impactful Unit Activities this Quarter:

- Direct and grassroots advocacy on the Right to Read Act and federal funding for libraries
- Promotion of National Voter Registration Day and Unite Against Book Bans advocacy materials for outreach to political candidates leading up to the November elections (Sept.-Nov. 8)

- Advancing the Unite Against Book Bans campaign
- Policy Corps IV training workshop in Washington, D.C. (Nov. 2-4)
- Committee on Legislation retreat in Washington, D.C. (Nov. 16-17)

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

- New Congress engagement
- launching our annual #FundLibraries campaign on FY2024 federal appropriations for libraries, with strategies that include:
    - hosting the #FundLibraries Congressional Fly-In, presented in partnership with COSLA (early March)
    - mobilizing advocates to generate signatures for Dear Appropriator letters when released in the House and Senate (March/April)
- Energizing support for the Right to Read Act when it is introduced
- Continued state and local support to protect the right to access diverse, inclusive school library collections, and pushing back on at least two pieces of legislation introduced in this Congress that are likely to be re-introduced:
    - The Parents Bill of Rights, which includes a mandate that parents have access to a list of the books in the school library, and
    - The Stop Sexualization of Children Act, which would prohibit institutions that receive any federal funding from "sexually-oriented" programs, events, and literature for children under 10. The bill also would prohibit federal institutions from hosting or promoting literature and works which promote sexual orientation.

PUBLIC PROGRAMS OFFICE (PPO)

Unit Manager: Melanie Welch

Unit Budget

· FY23 Budgeted revenue and expense: General Fund Admin: $266,403; Grants: $6,775,346; Overhead: $725,971

· Actual revenue and expense to date: General Fund Admin: $2005; Grants: $505,674; Overhead: $3973

# of Staff: 9 full-time positions; 8 currently staffed plus a three-year term position to support the large LTC grant.

Revenue Stream(s) the Unit Supports:

☒Contributed Revenue

Status Report on Pivot Strategy, Aligned Unit Goals:

PPO continues to be successful in fundraising and providing grant opportunities for libraries. Below are highlights of projects that were recently approved for funding and proposals currently under consideration by funders.

In October PPO received a $700,000 grant from Capital One for the next phase of Community Connect. This two-year project will advance the work started in phase one of the initiative by continuing to support digital access, digital literacy, and financial capability in rural communities nationwide. PPO will work in partnership with PLA and EveryoneOn

to create a suite of tools for rural libraries to help them link community members with local and national resources that can assist with establishing and sustaining home internet connections. The project will also provide wi-fi hotspots, laptops, and programming support for up to 30 rural public libraries to help them provide at-home internet access to their patrons.

In November PPO received funding from General Motors for $141,572.00 to support the implementation of Great Stories Club: Imagining Tomorrow: Building Inclusive Futures, a theme currently in development from a previous grant from General Motors. This theme is the newest in the ongoing project, The Great Stories Club: Reading and Discussion for At-Risk Youth. The 12-month project will include an application for re-granting to 35 libraries of all types. Selected grantees will receive a programming stipend, virtual project orientation training, sets of young adult science fiction books, and a suite of scholar-created materials for use with teenaged reading groups.

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

- PPO sees intellectual freedom concerns impacting the selection of program topics and 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. In response to this, PPO will be presenting a LibLearnX session in partnership with the National Coalition for Dialogue & Deliberation that would provide libraries with de-escalation training to help them facilitate conversations and programs that may be tense or hostile. We are also working with a subcommittee of our Public and Cultural Programs Advisory Committee to create resources specifically tailored to the needs of library programs staff.
- There is a major opportunity for libraries to continue their efforts addressing the digital divide by providing information to their communities about the [Affordable Connectivity Program](#) (ACP) offered by the Federal Communications Commission. To address this, PPO will work with EveryoneOn to incorporate resources and training into the planned *Community Connect* toolkit for rural libraries geared toward helping them connect patrons to the ACP information. PPO will also work with PLA to ensure the developed toolkit aligns with other ongoing work focused on ACP resources.

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

- American Rescue Plan (ARP) project: 200 grant recipients continued spending $10,000 in grant funds to spur humanities activities nationwide and networked in ALA Connect.
- Let's Talk About It (LTAI): Women's Suffrage: 25 grant recipients finished hosting programming in their communities
- Thinking Money for Kids: 4 libraries hosted the exhibit and conducted related programming for children and families
- Hybrid Programming Series: 2,325 people have viewed the six sessions of the NEH-funded free webinar series focused on hybrid library programming
- ProgrammingLibrarian.org: 65,320 unique users visited the website to access content about library programming
- Libraries Transforming Communities: Accessible Small and Rural Communities: 368 people have viewed the pre-application webinar for the grant opportunity.
- The first session of the "Libraries and Sustainability" Virtual Book Club, a three-part series of virtual, interactive conversations about incorporating sustainability into librarianship was held with 170 participants.

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 65,000 unique users visited ProgrammingLibrarian.org from September 1 to November 30, viewing more than 174,000 web pages. Recently, PPO has focused on publishing stories that focus on hybrid programming, humanities programming, and articles promoting PPO grant opportunities. Popular web articles this quarter have included an overview of how to set ground rules for hybrid meetings and discussions, the announcement of the LTC: Accessible Small and Rural Communities grant, and a story on how to become an "untraditional" library. Readers were also interested in various program models such as the Tiny Library program and a murder mystery book club. PPO's popular Programming Librarian Facebook group had 26,545 members as of November 30.

Describe the Most Impactful Unit Activities this Quarter:

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

- *Libraries Transforming Communities: Accessible Small and Rural Communities* which will award up to 300 small and rural libraries $3.5 million in grants to help them improve their facilities, services and programs for people with disabilities. Grant opportunity will close on February 28, 2023.
- *Media Literacy for Adults: Architecture of the Internet* issued an RFP seeking advisors to support the creation of adult media literacy programming resources focused on how the often-overlooked structural parts of the internet affect the information people see and find online. RFP closed and six advisors were selected in November 2022.
- The application period opened and closed for *World on the Move: 250,000 Years of Human Migration*, a traveling exhibition created by the American Anthropological Association that will go to 15 public libraries. Grantees will also receive a programming stipend, site support materials, and a virtual orientation training. Selection of sites will be announced in January 2023.
- The *Great Stories Club: Imagining Tomorrow: Building Inclusive Futures* development grant issued an RFP seeking advisors to create supplemental programming resources to be used with teenage audiences. The resources complement the scholar created thematic essay, discussion questions and reading list. RFP closed and two advisors were selected in October 2022.

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

- Two of PPO's annual grants (Peggy Barber Tribute Grant and Libraries Transforming Communities Engagement Grant) will open on December 1, 2022 with a deadline for libraries to submit by February 1, 2023.
- In January, PPO is partnering with the National Coalition for Dialogue & Deliberation to offer *Difficult Conversations: Dealing with Hostility and De-escalating Conflicts in the Library,* an Accelerator session at LibLearnX.
- On February 1, 2023, the Sara Jaffarian School Library Program Award will begin accepting nominations for school libraries that have conducted exemplary programming in the humanities during the current school year. Nominations will be accepted until May 5, 2023.
- Applications will open for the next phase of *Community Connect: Fostering Digital Access* in February 2023. Ten rural public libraries will be selected to receive hotspots, laptops, training, and a programming stipend to help bridge the digital divide.
- On January 18, 2023, the application will open for The Great Stories Club: Reading and Discussion for At-Risk Youth. Libraries of all types are welcome to apply for up to 100 grants on one of two themes, "Finding Your Voice" and "Deeper Than Our Skins." Applications close March 15, 2023.

PUBLISHING

Unit Manager: Mary Mackay

Name of Unit: ALA Publishing & Media

Unit Budget:

- Budgeted FY23 Revenue $9,340,335/ Overhead $2,475,189/ Total Expenses $8,704,860/ Net $635,474
- Estimated revenue through November 30, 2022: $2,081,179

    # of Staff: 44

Revenue Stream(s) the Unit Supports:

    ☒Publishing and Media

Status Report on Pivot Strategy, Aligned Unit Goals:

Revenue: ALA Publishing and Media met the FY22 revenue goal with sales of $9,329,853, providing overhead of $2,472,411 and net revenue of $751,437 (313% ahead of the budgeted $181,995, through a combination of expense control and support from PPP funding secured by Finance & Accounting for all units). At the end of Q1 of FY23, revenues for the department as a whole are estimated to be approximately 10% below budget, a deficit cautiously projected to turn around in Q2 and Q3.

Published content and initiatives that support EDISJ engagement and amplify "Let Our Legacy Be Justice" in Q1 included:
- *Foundations of Intellectual Freedom* by Emily Knox, published by ALA Neal-Schuman.
- *Booklist* webinars **Breaking Bans: A Celebration of Challenged Books; Celebrating Indigenous Stories and Storytellers; and Persevering in the Face of Book Challenges.** Booklist articles **such as one by** Will Haygood, author of *Colorization: One Hundred Years of Black Films in a White World* on the influence of *Arna Bontemps— Langston Hughes Letters 1925-1967*. Shelf Care podcast interviews with Tameka Fryer Brown and Nina Crews (authors of *Not Done Yet: Shirley Chisholm's Fight for Change) and* Daniel Minter (illustrator of *Blue: A History of the Color as Deep as the Sea and as Wide as the Sky*). Booklist Reader features such as *Recent Latinx Fiction & Memoir*; *Citizens, Strangers, & Dreamers Come of Age;* and *Narrators of Hispanic Heritage.*
- ALA Graphics continues to add diverse imagery and award-winning titles to its product selection, including most recently working with Kelly Yang to develop a Front Desk READ poster and bookmark. Yang's *Front Desk* received the 2019 Asian/Pacific American Award for Children's Literature.
- Articles in *American Libraries* on wayfinding and accessible design, easing access for caregivers of small children, helping undocumented individuals and others establish identification, navigating book challenges (including real-world examples), understanding media messaging through a BIPOC lens, as well as columns on union organizing and establishing a DEI audit in academic libraries.

Extending markets: Several initiatives are underway to reach broader audiences both in the US and overseas, and to repackage and repurpose content (also the focus of related CFT work). Planning for the January 2023 launch of *Booklist Reader* in print was completed in Q1, expanding *Booklist's* core audiences from library workers to library patrons and the public. Internal and external partnerships and collaborations remain a focus for ALA Editions/ALA Neal-Schuman, with recently published titles including *The Ultimate Privacy Field Guide* with OIF and three new books with Core: *Project Management in Technical Services, Transforming Technical Services through Training and Development,* and *Open Access Literature in Libraries*. The newest release in the partnership with trade publisher Sourcebooks, *Read These Banned Books*, was promoted during Banned Books Week and as a must-have gift this holiday season. (In addition to the regular

royalty paid to ALA, Sourcebooks will donate a portion of its profits from this title to Unite Against Book Bans.) With the Publishing CFT, Editions/Neal-Schuman has updated the Contact Us page to include translation opportunities. ALA Graphics continues to add partners and products to the online Gift Shop line, allowing for fast turnaround without sunk costs in inventory, and has added Spanish translations of several popular designs. RDA: Resource Description and Access continues to address global regional needs and to work with international translation partners, including forging a new translation relationship with ABINIA, an association of national libraries in Latin America.

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

- Revenues in Q1 are approximately 10% below budget across the board (advertising, subscriptions, and product sales). The exception is ALA JobLIST (a joint project between *American Libraries* and ACRL, with HRDR); although sales cooled a bit in Q1 following 18 straight months of year-over-year increases, they remained healthy at nearly 23% greater than budget. ALA Editions/Neal-Schuman had a strong September followed by two months with higher-than-expected returns. Given the timing of upcoming plans, expected product releases/publication, and insights from ad sales reps, we expect a turnaround in Q2 and beyond, and are carefully monitoring the environment. Economic headwinds pressured advertising revenues in Q1, and some advertisers (also ALA conference exhibitors and sponsors) have been pre-emptively cutting budgets in anticipation of a predicted recession. The recent news about inflation slowing may encourage renewed and increased spending in Q2.
- The launch of *Booklist Reader* in print will add a new subscription revenue stream beginning in January.
- We continue to monitor and mitigate increases in paper, ink, and postage costs where possible (lower print runs, paper type, fewer pages in magazines, fewer print catalogs, and working with printers on best practices). Paper costs seem to be improving, with paper stock more readily available.
- ALA Editions/Neal-Schuman FY23 eBook sales and fulfillment and print-on-demand options will be more streamlined and efficient as staff learn more about the capabilities of CDC's BiblioVault system in the new year.
- The virtual Gift Shop allows Graphics to respond quickly to trends and opportunities such as launching *Free People Read Freely* designs in coordination with OIF and the Freedom to Read Foundation.
- *AL* articles continue to address the increase in book bans and challenges. The Nov/Dec cover story highlighted examples of book challenges and defense efforts across five states. It also featured an excerpt of a PLA webinar with tips for protecting intellectual freedom in libraries. ALA's Ukraine Library Relief Fund was spotlighted in a feature about library workers rallying to preserve cultural information and raise funds for Ukraine's libraries.
- The Library of Congress and the Program for Cooperative Cataloging will roll out guidance and policy statements for use with the revised RDA standard in the first half of next year. This new guidance, along with similar works from the British Library and the Deutsche Nationalbibliothek, is a critical requirement for other cataloging institutions to plan their own transitions to new RDA.

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

Booklist Q1 FY23
- 7,435 avg. print subscribers (-279 from Q4)
- 4,330 avg opens for BOL-hosted digital editions (-1,031 from Q4)
- 1,493 avg opens for Zinio/Overdrive-hosted digital editions (-66 from Q4)
- 80 institutional digital subscriptions (+2 from Q4)
- 246,186 enewsletter subscriptions (-1,097 from Q4; top list 94.25K)
- 5,532 active profiles, Booklist Online (+3 from Q4)
- 44,100 Twitter followers (-1,000 from Q4)

- 16,529 Facebook page follows; (+87 from Q4)
- YouTube channel subscribers: 517 (+16 from Q4)
- 1,297 LinkedIn followers (+232 from Q4)
- 282 Instagram followers (new in Q1 FY23)
- Q1 Podcasts: 2,718 listens for 7 podcasts (Shelf Care and Shelf Care Interview)
- Q1 webinars: 23,229 registrants for 22 webinars

ALA Editions/ALA Neal Schuman Q1 FY23
- 16,650 Resources for Academic Librarians catalogs mailed
- 5,126 Textbooks and Course Resources catalogs mailed
- 2,022 orders (-1269 from Q4); 20,153 net units purchased (-8,187 from Q4)

ALA Graphics Q1 FY23
- 59,700 catalogs mailed (-300 from Q4)
- 960 orders (-909 from Q4); 5,888 net units purchased (-4,523 from Q4)

ALA Store Q1 FY23
- 167,313 sessions (+10,338 from Q4)
    - Note: Unique sessions stats not available in Google Analytics
- 402,499 unique pageviews (+36,318 from Q4)
- Users spend an average of 1:35 minutes per visit to the store (-24 sec from Q4)
- 42.4% of users find the store via organic search; 34.5% of users find the store via direct link (vs 32.9% in Q4)
- 18% of users find the store via referrals from other sites (51% from ala.org); 3.6% of users find the store via social media (vs 5.2% in Q4)

Digital Reference/RDA Q1 FY23
- 2,475 Toolkit subscribers (+139 from Q4)
- 9,771 users (+656 from Q4)
- 1,573 RDA-L email subscribers (+13 from Q4)
- 1,660 subscribers to RDA Toolkit YouTube Channel (+83 from Q4)

American Libraries and AL Direct Q1 FY23
- 46,316 recipients AL print (Sept/Oct and Nov/Dec) (-1,538 from Q4)
- 31,467 average recipients weekly AL Direct (-197 from Q4)
- 12,861 podcast listens (FY23 cumulative = 12,861)
- 95,740 Twitter followers (-2,051 from Q4); 20,755 Facebook page followers (-23 from Q4)

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 remains strong. One ongoing concern related to engagement is to ensure that we maximize the number of people buying each book or other product we publish, and that the right audiences are receiving pertinent information at the appropriate time to make purchasing decisions.

Describe the Most Impactful Unit Activities this Quarter:

ALA Editions/ALA Neal-Schuman Q1 FY23
- Published a total of 7 book projects. The cumulative total of books planned for FY23 is 40, plus 12-14 Facet titles.
- Targeted catalogs for academic librarians and instructors were mailed in September.
- ALA Editions/Neal-Schuman was the sole publisher to exhibit at ALISE October 24-26, displaying 30 new and best-selling textbooks and supplementary texts.
- ALA Editions author Scott Spicer presented a program related to his book *Student-Created Media: Designing Research, Learning, and Skill-Building Experiences* at the Sharjah International Library Conference in November.

Booklist Q1 FY23
- Planned for production, fulfilment, and printing to launch *Booklist Reader* in print in January, undertaking promotion and securing initial orders.
- *Book Links,* a supplement to *Booklist* published three times per year and offering literature-based resources for educators, schools, and libraries, will be paused for the remainder of FY23 in order to rethink content strategy and how it might be integrated into Booklist in order to save on staff resources and expenses in the face of declining advertising revenue.

American Libraries Q1
- Classified ad revenue for JobLIST, managed in collaboration with ACRL, brought in almost $123,000/unit in sales in Q1, 23% better than budget.
- The Sept/Oct issue featured stories about library design and an interview with author George Saunders. The Nov/Dec issue covered book bans and challenges as well as an interview with SCOTUS journalist Nina Totenberg and a repurposed podcast episode of library workers assisting efforts to help Ukraine's libraries and the preservation of the country's cultural information.
- Aired four episodes of the *Call Number with American Libraries* podcast, including one on design (September episode), a Halloween show focused on literary horror (October), and one about medical librarianship (November).
- Posted four 11 Questions interviews with new unit heads, including ones with Alena Rivers (ALSC), Rebecca Headrick (IT), Angela Gwizdala (ALA Editions/ALA Neal-Schuman), and Melanie Welch (PPO).

Digital Reference/RDA Q1
- A September release included new policy statements from the National Library of New Zealand and partial (almost complete) French-language translation.
- Digital Reference continued to support free monthly webinars, including an Update Forum from the North American RDA Committee and a French-language guide to simple monograph cataloging with the revised RDA.

ALA Graphics Q1 FY23
- ALA Graphics collaborated with CMO to develop the new theme for National Library Week 2023, *There's More to the Story*, which appears on posters and bookmarks in the winter 2022-23 Graphics catalog as well as on Graphics' Gift Shop at bit.ly/GraphicsGiftShop-NLW23.
- Based on the popularity of the Baby Yoda library card art, Graphics developed three new library card designs that can be purchased and downloaded from the ALA Store. A total of four library card designs—two featuring well-known children's book characters—are featured in the catalog for the first time.
- While Q1 unit sales and orders have dipped significantly from Q4 we're confident that the new catalog and visibility and sales at LLX will help us gain ground in Q2.

Select Future Activities and Events Through Q2, FY23:

Booklist:
- Published Editors' Choice and Starred reviews in December and will publish an issue focused on readers' advisory in January, a significant change in the editorial calendar.
- Launching *Booklist Reader* in print, offering not just increased reach but also potential to boost subscriptions and advertising revenues beginning in Q2.
- Launching a new *Booklist* website in Q2.
- Will provide programming and support events related to collection development and readers' advisory at LLX.

ALA Editions/ALA Neal-Schuman and ALA Graphics:
- With support from ALA Editions staff, ALA Graphics will manage the ALA Store at LLX. In addition to posters, bookmarks, and gifts, the ALA Store will feature a selection of ALA Editions gift and general interest books, allowing ALA Editions/ALA Neal-Schuman to have a bigger publishing presence in a separate booth and focus on display copies and bulk sales opportunities. ALA Publishing & Media will also have a presence at the rescheduled JCLC in February, showcasing the newest EDISJ resources.
- Books published in Q2 will include the fifth edition of best-selling textbook *Reference and Information Services, Serving Patrons with Disabilities, The Library's Guide to Sexual and Reproductive Health Information,* and *Manga in Libraries.*

American Libraries:
- The January/February 2023 issue of *American Libraries* includes a preview of the first in-person LLX conference (cover story), as well as a return to our dining guide feature, the first since 2019. The *American Libraries* team will be reporting on LLX sessions, posting coverage on our blog and in the *Daily Scoop* e-newsletter.
- Trend articles in the January/February issue include EDI topics (libraries creating gender-affirming closets, for example) and intellectual freedom issues (a profile of three library directors who resigned because of community challenges). The March/April issue will look at COVID three years later, including library services that have changed during that time, how relief funding has been used, and what innovations will persist. The December episode of *Call Number with American Libraries* is an annual roundup of the year's author interviews. The January episode will look at New Orleans and LLX, and the February episode will be about love.

Digital Reference/RDA:
- The Digital Reference (RDA) team will focus on a restructure of unit responsibilities (necessitated by a staff departure), continued orientation efforts to customers to prepare them for transition to the revised standard, continued engagement with new and current translation partners, and upgrading Drupal-based websites that support marketing and outreach to better address community needs.

REFERENCE AND USER SERVICES ASSOCIATION (RUSA)

Unit Manager: Bill Ladewski

Unit Budget:

- Budgeted revenue and expense $314,250/$309,016
- Actual revenue and expense $302,335/$267,481

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

Revenue Stream(s) the Unit Supports:

    ☒Continuing Education

☒Membership

Status Report on Pivot Strategy, Aligned Unit Goals:

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

> RUSA ended the 2022 membership year with 2571 members. This represents an increase of 23 members for the membership year, or .9% growth, slightly below our target of 1% annual membership growth. RUSA Section membership increased in three of our six Sections. The largest Section membership growth occurred in RUSA Sections CODES with 4% growth and STARS with 5% membership growth.

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

> RUSA's final CE revenue for FY22 was $113,628. This exceeded our budget for CE of $100,800 and represents 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:

- Reproductive Health Initiative: RUSA was recently invited to be part of a conversation with ALA around developing education and resources to support reproductive health. To date the RUSA president and president-elect have been part of the conversations, and member of the RUSA Section RSS (Reference Services Section) will likely join upcoming conversations. More details on the scope of the effort will hopefully come together in early 2023.

- RUSA Nominations for 2023 ballot: The RUSA Nominating Committee has been working this quarter to confirm its slate for the 2023 election. In total RUSA will be looking to elect 14 leadership positions to fill roles for RUSA and its Sections. There have been challenges for the nominating committee to find enough candidates to run for election. Specifically, some RUSA Sections have struggled to fill out their ballot. We have been granted an extension from the ALA to keep the online bio form open for two additional weeks. With this extension we hope to be able to fill all the ballot positions.

- RUSA Staffing: RUSA continues to operate at a staffing level of 1.8 FTE's which is below our budgeted figure of 2.3 FTE's. We have been able to manage at the current staffing level without any noticeable drop off that would be felt by members. To grow RUSA, we will need to invest in more staffing at the appropriate time and hopefully that will occur in the first half of 2023.

# of Members (for Divisions): 2,540 as of September 2022

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

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

RUSA has continued to work hard to populate its CE calendar to help achieve our annual growth goals. RUSA's membership through the most recent reported month of September of 2,540 show a decline of 22 members from our August membership number of 2,562.

- RUSA Continuing Education: Through the 1Q of FY23, RUSA CE has presented 2 courses and 2 webinars totaling 170 participants. Additional confirmed upcoming CE programing consist of 1 e-course and 2 webinars.

- RUSA Budget & Finance Town Hall: RUSA hosted a Town Hall on December 5th which provided an overview of RUSA's current financial standing, along with what the focus areas will be of future budget planning. An update was also provided on the progress to date of RUSA's pivot strategy which came out of the work of the RUSA Futures Taskforce. Approximately 50 members attended the Town Hall.

- RUSA Virtual Forum: The dates for the 2023 RUSA Virtual Forum have been selected. The two-day program will occur on March 28 & 30. RUSA is currently collecting submissions for the Virtual Forum from our 6 Sections and 5 Interest Groups. The theme of the Virtual Forum will be *Reference and User Services Re-Imagined*.

Describe the Most Impactful Unit Activities this Quarter:

- RUSQ Journal: At its October Board meeting, the RUSA Board voted to move forward with reestablishing a peer-reviewed journal. RUSA's previous journal, RUSQ, ceased accepting submissions and publishing in 2021 due to the cost of producing the journal and challenges in providing the necessary editorial support. An editorial group has recently been established to begin planning for the relaunching of the journal. A timeline for the relaunch will be established hopefully in early 2023.
- Giving Tuesday: RUSA engaged in a weeklong promotional effort for this years 'Giving Tuesday'. A message from the RUSA president began the promotion and following messages with the theme "Why RUSA is Important to Me" came from many RUSA members. Going forward RUSA will continue to emphasize 'Giving Tuesday' on an annual basis and look to increase its donations year over year.
- RUSA Achievement Awards: RUSA officially opened its 2023 Achievement Awards nomination period on October 17th. Nominations will be accepted through February 17th. RUSA currently supports 24 total Achievement Awards.

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

Book &Media Awards: The annual Book & Media awards ceremony will occur during LibLearnX on Sunday, January 29th at 4:30 p.m. CT. RUSA is home to many book and media awards and Best of Lists for adults. Now in the national spotlight with other prestigious literary awards, the Andrew Carnegie Medals for Excellence in Fiction and Nonfiction are announced at the RUSA's Book and Media Awards ceremony. The year's best in fiction, nonfiction, poetry, audiobook narration, reference materials and more, are hand-picked by selection committees that work closely with adult readers. Their efforts narrow down hundreds of finalists to curate the highly regarded "Best of" lists used by librarians, publishers, and booksellers nationwide.

- FY24 Budget Planning: Planning for the FY24 RUSA budget will begin in late January and the first submission of the budget will be due in early March. The RUSA Budget & Finance committee has been meeting monthly since it was reformed coming out of the work of the RUSA Futures Task Force in 2020. Primary goals for the FY24 budget will be to budget for continued growth in membership revenue and Continuing Education, along with establishing a new reliable revenue stream. This new revenue stream may come from advertising in the relaunched journal RUSQ, or in new fundraising and sponsorship efforts, both of which the RUSA B&F committee are currently exploring.

UNITED FOR LIBRARIES

Unit Manager: Beth Nawalinski

Unit Budget:

- Budgeted revenue and expense
    - FY22 Budgeted Revenue: 383,100
    - FY22 Budgeted Expense: 374,432
    - FY22 Budgeted Net Revenue/Expense: 8,668
- Actual revenue and expense
    - FY22 Actual Revenue: 391,846
    - FY22 Actual Expense: 300,552
    - FY22 Actual Net Revenue/Expense: 91,293

# of Staff: 2.8 (0.8 unfilled)

Revenue Stream(s) the Unit Supports:

☒Continuing Education

☒Membership

Status Report on Pivot Strategy, Aligned Unit Goals:

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

- United staff continues personal outreach to groups to encourage conversion to personal membership.
- Weekly office hours available and individuals can schedule personal one-on-one meetings with staff

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

- Goal completed in fourth quarter of FY21.
- FY21 revenue exceed in fourth quarter of FY22.
- Statewide add-on option added in 2022 with several states already committed to purchase again in 2023.
- 2023 virtual conference scheduled for August 1-3, 2023.

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, WI (new)
- Statewide Training (varies by state): AK, AL, IL, MS, MO (new), NJ
- Discussions in process with additional states
- United staff is working to enhance data/analytics for state libraries
- New social media and promotion toolkit in development for statewide partners

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

Intellectual Freedom and book challenges continued to be the most prominent area of work. Our Intellectual Freedom Task Force and Advocacy Committee combined and restructured to a single Intellectual Freedom, Advocacy, and Public

Policy Committee with sub-committees working in each area. Programs, resources, and training are in development related to Trustee training and onboarding, board succession planning, board takeovers, Trustee role in challenges, and how board members and directors can work together effectively.

Launch of our updated Short Takes for Trustees videos was slower than anticipated with final rollout expected in early 2023. New topics include Intellectual Freedom and Equity, Diversity, and Inclusion.

Staff and members worked extensively with consultants to finalize an Intellectual Freedom interactive toolkit funded by support from a bequest from the late Jack Neal. The toolkit launches in January 2023. The goal of the toolkit is to provide an informative and interactive e-forum to identify and discuss opportunities for library advocates to defend intellectual freedom challenges, and other issues that may come an institution's way.

The toolkit is free for United for Libraries statewide all-access partners and will be available for purchase on the ALA eLearning site. The toolkit features four sections: (1) Preparedness, (2) Pro-Active and Reactive Responses, (3) Scenario Exercises, and (4) Reflect and Recharge. Interactive activities include:
- Create your own mantra
- Share challenges your library is facing
- Play Banned Books Jeopardy
- Practice Stating Your Collection and Reconsideration Policies
- Respond to Scenarios: Shape Messages, Proactively, and Reactively
- Questions to Ask in a Debrief

# of Members : 3,984 as of September 30, 2022

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

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

1st Quarter United for Libraries Learning Live (monthly members only webinars):

- September 13, 2022: Ask the Experts: Boards of Trustees
- October 11, 2022: Let's Execute! Identifying Actionable Steps in Your Strategic Plan to Create the Impact Your Community Deserves
- November 15, 2022: Ask the Experts: Fundraising & Library Foundations

National Friends of Libraries Week – United for Libraries sponsored the 17th annual National Friends of Libraries Week, October 16-22, 2022. Hundreds of enthusiastic library staff and Friends of the Library attended the free webinar, Friendraising & Fundraising Ideas for Friends Groups and Libraries of All Sizes featuring unique fundraising projects from three libraries.

New Jersey Trustee Institute – United for Libraries staff coordinated the keynote and several breakout sessions for the New Jersey Virtual Trustee Institute held October 8, 2022. Topics included:

- Equity Diversity & Inclusion: What Library Boards Need to Know featuring United's 2022 Emerging Leaders Team
- Challenges to Materials and Programs: The Role of Library Trustees & Board Members
- How to Register & Use the Trustee Academy Webinars for Continuing Education

Additionally, United staff hosts weekly office hours and held multiple statewide onboarding webinars in the first quarter.

Describe the Most Impactful Unit Activities this Quarter:

Statewide Partnerships – United for Libraries staff held drop-in sessions and weekly office hours to help individuals register for and access statewide training via the ALA eLearning website. Prior to the launch of this site, United for

Libraries hosted statewide training via the Teachable platform. That platform has now been sunset with all users accessing via the ALA eLearning website. Our statewide partners include:

Statewide All-Access Partners:

- Maryland
- Massachusetts
- Michigan
- Montana
- Nebraska
- New Hampshire
- North Dakota
- Oregon
- South Carolina
- South Dakota
- Texas
- Virginia
- Wisconsin (new)

Additional Statewide Partners (varying levels)

- Alabama
- Alaska
- Illinois
- Missouri (new)
- New Jersey

United staff continues to focus on cultivating new statewide partners, registering and onboarding individuals, creating new and updating current resources, and enhancing data/analytics. The statewide relationships are integral to our continued growth.

We continue to see a steady incremental increase in personal memberships with the promotion of the new BoardSource member benefits and the clear distinction between statewide training and personal membership. Membership statistics demonstrate some attrition in members who renew their ALA membership but not United for Libraries. Staff has begun personal outreach to these individuals to encourage renewal of division and ALA membership.

As part of our statewide offerings, United staff has implemented quarterly webinars on hot topics of interest to library boards and directors. These webinars are free to statewide all access partners and heavily discounted for United personal members. See Library Policies and Diversity, Equity, and Inclusion: What Trustees & Boards Need to Know in the next section. These quarterly webinars provide a source of direct revenue and significantly enhance the value of our statewide training packages.

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

- BoardSource Member Benefits – United personal members receive FREE BoardSource member benefits, a $130 value. To add United for Libraries to your personal ALA membership, click here.

- United for Libraries offers weekly "office hours" via Zoom on Thursdays from 12:00-1:00 pm Eastern.

- Upcoming Learning Live:
    o Tuesday, January 10, 2023, 2:00 pm Eastern: Privacy 101: How to Support Your Library

- o Tuesday, February 14, 2023, 2:00 pm Eastern: DEI Scorecard for Library and Information Organizations
- o Tuesday, March 14, 2023, 2:00 pm Eastern: Social Media and Library Policies
- o Tuesday, April 11, 2023, 2:00 pm Eastern: Board Support for Success

- [Library Policies and Diversity, Equity, and Inclusion: What Trustees & Boards Need to Know](#) will be presented via webinar on Saturday, January 21, 2023, 11:00 am-12:30 pm Eastern. Crafting and revising library policies with an equity, diversity, and inclusion lens is essential for public libraries. Learn how the library board and the director can work together to ensure that the library's policies are inclusive to those who identify as BIPOC, disabled, and/or LGBTQ+, etc. Find out how to identify problematic issues in current policies, and how to ensure your policies follow legal guidelines. Attendees will also learn tips on demonstrating the importance of inclusive policies to board members and library staff. A Q&A will be included in the presentation.
  - o Free for those in MA, MD, MI, MS*, MT, ND, NE, NH, OR, SC, SD, TX, VA, WI
    - ▪ In MS, free for library director and Trustees of the 53 regional libraries.
  - o Registration Rates
    - ▪ $79 non-member
    - ▪ $71.10 ALA personal member
    - ▪ $51.35 United for Libraries personal member

YOUNG ADULT LIBRARY SERVICES ASSOCIATION (YALSA)

Unit Manager: LaMoya N Burks

Unit Budget:

- Budgeted revenue and expense $581,927 / $582,741
- Actual revenue and expense $ 439,108 / $529,432

# of Staff:

Revenue Stream(s) the Unit Supports:

☒Conference Services

☒Continuing Education

☒Contributed Revenue

☒Membership

☒Publishing

Status Report on Pivot Strategy, Aligned Unit Goals:

 November 2022 YALSA membership total: 3225. November 1 – November 15 membership increased 3184 to 3225.

YALSA staff and membership committee send monthly new member emails welcoming community, resources, and opportunities. The most recent new member emails were sent November 30, 2022, 60 were sent, 6 clicks, 45 opened.

2,397 postcards were sent to lapsed members May 2022 with an incentive for those that rejoin by September 1 to enter a chance to win free registration to YALSA Symposium 2022. 75 members reinstated membership through this effort.

YALSA Member of the Month spotlights the significance and importance of youth librarianship. Membership is encouraged to submit monthly nominations. Each awardee receives a certificate and lapel pin.

 YALSA staff continue to personalize customer service through phone calls and emails to those with 20+ years membership and to encourage committee engagement. The Division strives to return phone calls and emails received within 24-48 hours.

Masterclass grant was approved to support 4,300 memberships (insert $$). YALSA plans to implement subscriptions into membership campaigning, to incentive current members, and support member leader and staff development.

Symposium 2022 early registration opened June 29th and ended September 15, 2022, with a total of 333. 455 total attendees for Symposium 2022 November 3-5, 2022. YALSA's weekly conference marketing plan results included in kind sponsorships (total $12,400.00) and ($23,924.00) ticketed events. The IMLS Train the Trainer Cohort presented a pre-conference and a focus group for Continuing Education engagement.

ALA Continuing Education and YALSA agreement is finalized. The first scheduled revenue driven session scheduled January 2023.

The YALSA Media Kit for 2023 is updated and Innovative Media has begun to advertise electronically for the Division. The average revenue in 2019 through this effort for YALSA was on average $8-10,000 yearly.

The YALSA Winter Issue was published October 28, 2022.

Describe the major issues, trends, opportunities, or concerns that your unit has or is responding to at the closing of this fiscal quarter:
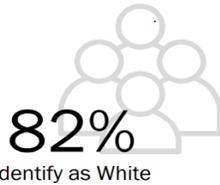
- YALSA seeks support to increase funding for scholarships, specifically those supported through Friends of YALSA
- YALSA continues to work closely with ALA Finance to stabilize budgeting
- YALSA continues to work with its member leaders to increase awareness, focus on practices that align best for the Division with ALA
- YALSA has an opportunity to strengthen advocacy of today's trends and issues important young adult library professionals and the communities they serve
- YALSA continues to work with ALA IT and all other technology driven areas to improve website presentation to align with customer service (update of links, confirm all Division email addresses, etc.)
- YALSA seeks to implement a conference committee to improve planning for Symposium 2022 to bridge gaps in its outcomes
- YALSA seeks to address importance in retaining members especially members of color or other minority groups.
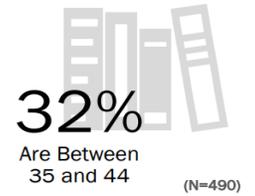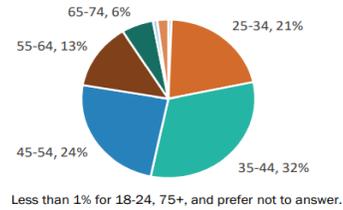
Demographics – Members

Race and Ethnicity

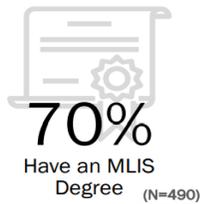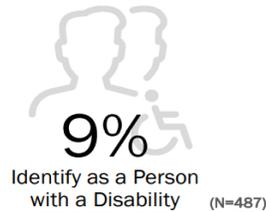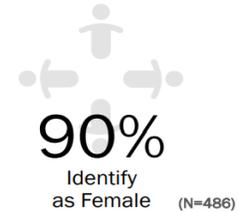|	
White	82%
Prefer not to answer	6%
Black or African American	6%
Hispanic or Latino	4%
Asian	3%
Self Identify	2%
American Indian or Alaska Native	1%
Middle Eastern or North African	1%
Native Hawaiian or Pacific Islander	0%

(N=486)

82%
Identify as White

Age Groups

65-74, 6%
25-34, 21%
55-64, 13%
45-54, 24%
35-44, 32%

Less than 1% for 18-24, 75+, and prefer not to answer.

32%
Are Between
35 and 44
(N=490)

Level of Education

70%
Have an MLIS
Degree (N=490)

Ability and Disability

9%
Identify as a Person
with a Disability (N=487)
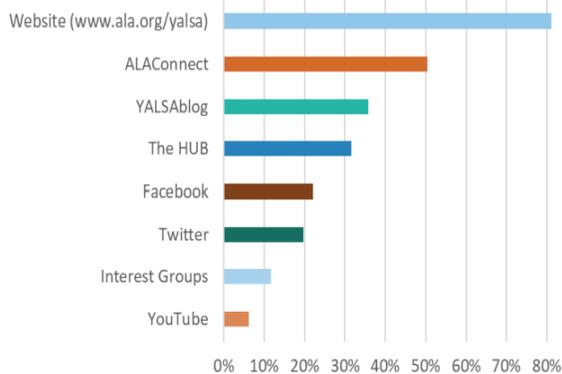
Gender Identity

90%
Identify
as Female (N=486)
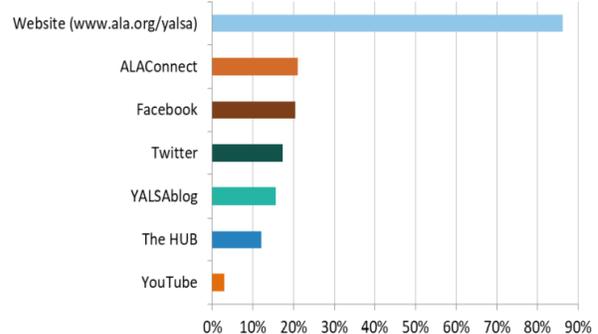
YALSA Connection Channels

The website is by far the way most members and non-members connect regularly with YALSA.

While the sample size is small on this dimension, **those who identify as Black or African American or Hispanic or Latino are statistically significantly more likely to connect with YALSA on YouTube** that those who identify as White.

Ways Members Regularly Connect with YALSA

Website (www.ala.org/yalsa), ALAConnect, YALSAblog, The HUB, Facebook, Twitter, Interest Groups, YouTube

Ways Non-Members Regularly Connect with YALSA

Website (www.ala.org/yalsa), ALAConnect, Facebook, Twitter, YALSAblog, The HUB, YouTube

Q15/Q14NM: In which of the following ways do you regularly connect with YALSA?   (N=520)

Reference : Kusibab (2021). *Strategic Planning Research Report*, Young Adult Library Services Association

# of Members (for Divisions): 3225

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

3225 total members for the Division

2,397 total reached for lapse member contact (May – September 2022)

Stakeholders – 13 Corporate sponsors confirmed for Symposium 2022, 56 contacted

<u>Quarterly Member Forum September 2022</u>

Eblasts 7929 delivered, 3045 opened

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

- YALSA Editors for YALS and JRYLA hired (stipend supported). The additions will support moving publication outcomes and progress forward.
- Communications Marketing Plan kick off late- January to increase social media presence through boosting methods, text messaging service member communications strategy implemented, and data tracked
- Plans to impact revenue for the Division December 2022- January 2023 Friends of YALSA Circle of Friends through mailing campaign
- YALSA Virtual Silent Auction November 2022 Black Friday Kick off to support scholarships through Friends of YALSA
- IMLS T3 Cohort ends March 2023 with outcomes to include toolkits and research tools to support YALSA membership incentives and advocacy
- YALSA supports New York Public Library IMLS grant expectations to support training of young adult staff to support teens and mental health.
- YALSA and ALA Continuing Education to track and market outcomes for collaboration
- YALSA history project with support of ALA Library team to begin updating gaps in history 2000-2022
- YALSA Symposium conference committee created to run approximately 8 months for planning purposes
- YALSA Quarterly Member Forum scheduled January 2023
- YALSA contribution to 2023 LibLearnX Youth Media Awards
- YALSA highlighted in New York Times for Symposium 2022 session -publication expected December 2022
- Updates to YALSA Business Plan to reflect 2022-2025