ALA Executive Director's Report to the ALA Executive Board June 2024

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ALA Executive Director's Report

Recently a friend who is well versed in issues relating to libraries asked me "*What does ALA do?*" He wasn't satisfied with "ALA is the voice for American's libraries and librarians". So I provided a lengthier answer to inform him about the importance of our advocacy work, the funding it brings to libraries for broadband support, workforce development, and targeted grants., the robust, varied continuing education we provide to ensure library workers remain current with existing and new practices, the opportunities we offer for professional networking, our targeted publications, opportunities for leadership development, our collaborations with other partners, and our important work in the fight against censorship..

But I've been thinking about his question for several weeks and came to this simple conclusion about what ALA does – **ALA MAKES LIBRARIES BETTER**!

The reports that follow provide you with a summary that illustrates how that happens every day at ALA.

In a few months ALA will have a new executive director who will guide the association into the future. I hope that next executive director is a change agent and a seasoned professional who understands how to "right-size" our business, has a clear vision about what a professional association in 2024 and beyond needs to become successful, and has concrete ideas and strategies to put us back on the path to financial success. The next ED needs to make a new, meaningful strategic plan a priority.

As an association we are at a critical juncture where the reimagination of what and how we do it, an inclination to embrace and effect change, and smart business practices will help put ALA back on strong footing.

Here are some of the challenges that must be addressed to ensure that ALA can make libraries better for years to come.

We must address our financial crisis and find ways to "right size" or "re-focus" the organization. Several of our traditional revenue sources – conferences, membership and publishing are generating far less revenue than in previous years. We are thinking about how to address all these areas in creative ways that will generate more income or reduce costs. The rising cost of doing business in a post-COVID world created added pressure to our financial situation.

We must rethink the ways in which we work and support those who work for us.

We must centralize services across the association to end duplication of effort and reduce costs.

We should consider new lines of business. This means new services or products that we could offer to libraries. Recent cybersecurity attacks on libraries have me thinking about whether we might develop and offer reduced cost cybersecurity software or consulting advice and how to protect library systems and date. I am sure that there are other needed fixes for that would benefit libraries and could be developed and sold by ALA. Rapid advances in AI applications have significant implications for how we and our colleagues work; we need to be ready to address that as well. I'm confident that if we put our heads together, we can come with useful services and products that will make libraries even better.

We need to consider if our current member leader model right for today's working librarians. We know that many can no longer afford to attend our conference. We also know that people are working differently, and that zoom has taken the place of many in-person meetings. We need to think about what that means regarding member engagement and develop opportunities for new paths to association involvement.

We need to be strategic and thoughtful about our place in the library and information universe, engaging with new partners and repairing relationships with those partners or organizations who have been viewed as competitors not potential collaborators.

And finally, **we need to change our organizational culture** for both members and staff to ensure that we embrace change and new thinking about what we do and how we do it. This is not the time to shy away from change.

We've made significant progress in addressing these issues in the last 6 months but there is much more to do before we can assuredly state that ALA is financially sound and well-positioned for the future.

Giving to ALA: Improving the Donor Experience

Based on feedback we received from the Town Hall meeting held earlier this year we reimagined the donor experience for those who want to contribute to ALA. We've made some improvements on our new website but shortly we will launch an even easier and more appealing landing page for donors.

ALA's New Website

The IT Team and staff worked collaboratively to update and redesign the ala.org website and upgrade the platform to Drupal 9. The new site was launched several weeks ago without a glitch. Reaction to the new site is positive and creates the groundwork for further improvements and enhancements.

150th Campaign

I am pleased to report that we have most of the infrastructure we need to manage a successful campaign in place. We have chosen Salesforce for the donor CRM and will migrate information from our current database soon. We have developed or are in the process of developing a gift acceptance policy, gift or pledge agreements, and funding priorities. We have selected a communication and marketing firm to assist in developing campaign messaging, branding and collateral material.

We also advertised for a development director and received a healthy response. Alan Inouye and I will be conducting first round interviews over the next few weeks.

Anne Manley, Alan Inouye and I will be visiting several foundations in NYC the week of June 3rd. I will report fully on the outcomes at the Executive Board meeting in San Diego.

ALA Financial Summary

Total ALA	Actual March 31, 2024	Budget March 31, 2024	Seven Month Variance March 31, 2024
Total Revenue	$ 28,736,971	$ 24,583,533	$ 4,153,438
Total Expenses	31,975,558	28,297,477	(3,678,081)
Surplus (Deficit)	**$ (3,238,587)**	**$ (3,713,943)**	**$ 475,356**

	Seven Month Actual March 31, 2024	Seven Month Budget March 31, 2024	Seven Month Variance March 31, 2024	Prior Seven Month Actual March 31, 2023	Difference FY24 - FY23
REVENUE BY FUND					
General Fund	$ 10,448,506	$ 14,486,023	$ (4,037,517)	$ 16,597,149	$ (6,148,643)
Divisions	5,923,179	7,312,403	(1,389,224)	7,249,378	(1,326,199)
Round Tables	319,671	328,390	(8,719)	293,928	25,743
Grants and Awards	11,103,408	2,118,197	8,985,211	9,532,493	1,570,915
Long-term Investment	942,207	338,520	603,687	1,197,011	(254,804)
Total Revenue	28,736,971	24,583,533	4,153,438	34,869,959	(6,132,988)
EXPENSES BY FUND					
General Fund	17,637,987	15,188,368	(2,449,619)	15,458,531	(2,179,456)
Divisions	6,728,216	7,419,469	691,253	6,679,554	(48,661)
Round Tables	92,429	240,013	147,584	120,920	28,491
Grants and Awards	6,842,556	4,525,526	(2,317,030)	3,856,190	(2,986,365)
Long-term Investment	674,371	924,101	249,730	585,559	(88,812)
Total Expenses	31,975,558	28,297,477	(3,678,081)	26,700,755	(5,274,804)
SURPLUS (DEFICIT)					
General Fund	(7,189,481)	(702,345)	(6,487,136)	1,138,618	(8,328,099)
Divisions	(805,037)	(107,066)	(697,971)	569,824	(1,374,861)
Round Tables	227,241	88,377	138,864	173,008	54,234
Grants and Awards	4,260,853	(2,407,329)	6,668,181	5,676,303	(1,415,450)
Long-term Investment	267,836	(585,581)	853,418	611,452	(343,615)
Total Surplus (Deficit)	**$ (3,238,587)**	**$ (3,713,943)**	**$ 475,356**	**$ 8,169,204**	**$ (11,407,791)**

In January 2024 ALA received a $10 million multiyear pass-through grant reflected in the revenue under Grants and Awards.

FY 24 Q3 Membership Summary

Published May 21, 2024, using April 2024 membership statistics

As of month-end April statistics, the total ALA membership count stands at 49,940 members compared to the count of 50,028 at April month-end in FY 2023. This continues the historical trend of membership increasing during the second quarter with later quarters slowing and is a .18% or very slight decrease year over year. Personal and Corporate Memberships have grown 2.6% and 5.97% respectively so far this year. Unfortunately, Organizational Memberships are down 27.12% YOY. Organizational Memberships are a focus of current and future strategy plans to offset challenges in this membership segment. Overall, ALA Membership has been steady in the 48K+ range for a couple of years.

The ALA membership team and staff stakeholders are working hard on innovative ideas and strategies to boost membership. Our membership strategy remains focused on retaining current members and recruiting new members to ALA through initiatives such as:

- A Top 5 Reasons You Should Join ALA customizable flyer and benefits campaign highlighting the top member-exclusive benefits that ALA offers members with email campaign support.
- Collaborating with other ALA staff teams, divisions, and round tables to coordinate cross-marketing benefits.
- Adding new member exclusive discount programs and reinvigorated marketing of availability of an updated portfolio of services.
- Increasing responsiveness in our customer experience center and increasing capacity for outreach capabilities as well as knowledge management.
- Developing targeted eLearning program offers for Organizational Members to enhance member value including a 50% discount on the upcoming *Essentials* course.
- Ramping up student and faculty needs assessment and membership activities in collaboration with the CRO (Chapter Relations Office).
- Planning and Implementation efforts of the new dues model, which will take effect September 1 and will provide most membership segments with more affordable and simplified future dues.

With two-thirds of ALA members paying dues from their own pocket, ALA dues revenue is sensitive to economic conditions, and we continue to see the impact of the political environment around financial investments with ALA. There are continued signs of softening in organizational memberships due to some of the disassociation efforts while other membership categories have been more stable.

ALA American Library Association

Members over Time

Year
- FY 2020
- FY 2021
- FY 2022
- FY 2023
- FY 2024
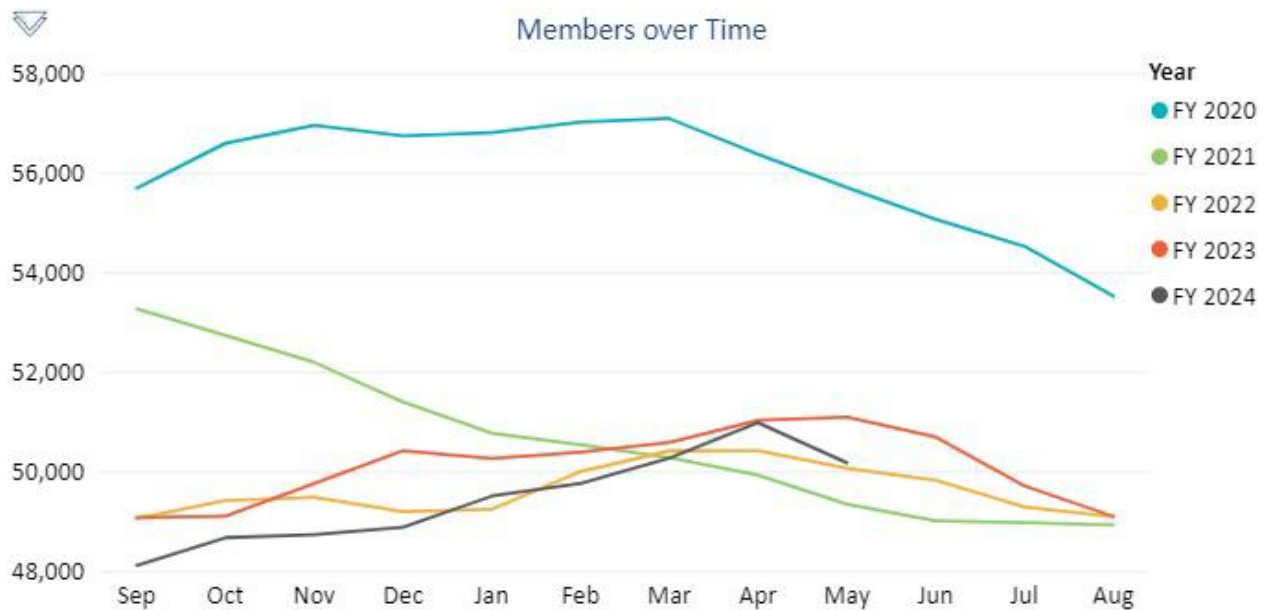
Student Membership Initiatives

Student Focus Groups

In April, ALA hosted four focus groups for LIS students. We heard consistent feedback in these groups around challenges students are facing, what they are looking for in engagement opportunities, and preferences around communications. The ALA membership team is in the process of distilling the feedback into an action plan for student member engagement. Working with the ALA Membership Committee, we plan to have plans in place to begin implementation in September.

Student Engagement and ALA Annual Conference

To engage with student attendees of ALA Annual, we are collaborating with the New Member Round Table (NMRT) and the Chapter Relations Office (CRO) to host a virtual conference orientation in advance of the conference (Thursday June 6th at 10am PT / 12pm CT / 1pm ET). This session will be similar to NMRT's onsite orientation with a focus on student-specific conference tips and highlights as well as including one of our student chapter leaders on the panel.

Additionally, ALA President Emily Drabinski is hosting a student reception during Annual (Saturday 6/29 from 5pm – 6pm at the Marriott Marquis, Balbo/Mission Hill Ballroom). This session will bring student attendees together with ALA member leaders from across the association to network and ask questions in a social and celebratory environment.

Engagement and Retention Initiatives

ALA Annual Session

Session Title and Description:

How to Use your ALA Membership to Connect, Discover and Engage

The American Library Association is the foremost national organization providing resources to inspire library and information professionals to transform their communities through essential programs and services. For more than 140 years, the ALA has been the trusted voice for academic, public, school, government, and special libraries, advocating for the profession and the library's role in enhancing learning and ensuring access to information for all. ALA is also a dynamic network of library workers from all types of libraries and backgrounds and from around the world. ALA members are ALA!

ALA is also a complex organization that can be difficult to navigate and a little overwhelming for new members. This session will give you tips on how to make the most of your ALA Membership including how to find resources to serve you and your library, how to connect with other members, and how to get involved.

ALA Virtual Membership Office Hours

Hosted by staff from the ALA Member Relations & Services office, these live sessions provide an opportunity for you to ask questions about your membership or resources and provide tools and information available to you, as well as a forum to ask for advice on navigating your ALA journey.

Next session: July 17, 2024

ALA Division Membership Recruitment and Retention Updates

Association for Library Service to Children (ALSC) (-2.79% YOY):

ALSC has a strong, dedicated Membership Committee who works to engage members across a variety of modes, including at in-person conferences and virtually for informal member meetups and formal informational sessions, monthly blog posts regarding membership-related activities, and long-term strategic thinking around member engagement. Currently, the committee is working on activating student members and re-envisioning the ALSC mentorship

program, which was a strong leadership building initiative but fell by the wayside with the departure of some key staff.

ALSC staff continue to stay engaged in membership efforts by finding new ways to articulate ALA and ALSC member benefits. For example, a new partnership with the ALA CE Unit has enabled ALSC to highlight more virtual professional development opportunities with significant discounts available for ALSC members. Similarly, ALSC members benefit from strong discounts at ALA and ALSC conference events. ALSC's New Member Center highlights key benefits and opportunities to those who are new to the field or association, and the Member Engagement Center offers opportunities for a variety of levels of member involvement.

Association of College and Research Libraries (ACRL) (-3.4% YOY):

ACRL's membership activities build on retaining core membership while recruiting from new and diverse communities. ACRL 15 sections offer vibrant and dynamic communities that nurture individual development and foster a deeper connection to the profession. Sections offer successful mentoring opportunities along with programming and social events to create community among new and continuing members. Many ACRL sections participate in onboarding activities to orient new members to the work of the section and ACRL in general. In addition, ACRL's 14 interest groups address emerging areas of interest in academic librarianship and the division's 16 discussion groups provide avenues for members to connect around issues through informal networks for exchanging ideas and problem-solving.

This year, ACRL staff, in conjunction with the division Membership Committee, updated welcome and renewal notification messaging sent daily through ALA's Informz email marketing system. Work on creating a more robust onboarding campaign for new ACRL members also began this year. In addition, the ACRL Board of Directors, with support from staff, undertook a project to examine retention and recruitment of organizational membership, along with organizational member benefits. Work on these projects will continue in the 2024-25 association year. The ACRL Leadership Council and Membership Meeting at the 2024 ALA Annual Conference in San Diego will offer members an opportunity to hear updates on division activities, listen to a panel of members discuss their experiences with ACRL, and participate in table discussions to help inform ACRL how it can best support its members and the profession.

Core: Leadership, Infrastructure, Futures (-3.5% YOY):

One of our biggest accomplishments last Fall was ALA Staff Member, Amber Robbin's creation and implementation of our first automated email campaign. It is the most complex campaign the unit has implemented, and it integrates targeted content to section members. One component of the campaign will help us understand why members are joining Core so that we can customize the content they receive based on their expressed interests. We are hoping this will increase retention of new members. Amber's next membership project is to create

campaigns for renewing and lapsed members. We also plan to reach out to members of the past three divisions who dropped from Core when the division was created. Many members said they would sit back and see what Core became before becoming involved. This will be a project of a subgroup of the 5-year Anniversary Steering Committee. In addition to these efforts, we continue to increase and promote member benefits including the WMS Sandbox, free access to Core webinar archives, free student member access to live Core webinars and discounts to CE and Core Forum.

Public Library Association (PLA) (+13.66% YOY):

PLA has continued our efforts to onboard new members with an Informz drip campaign (launched Fall 2022), as well as personal outreach from our Membership Advisory Group. Since this was a PLA Conference year, additional effort was put forth to welcome new member attendees, inviting them to engage in the Member Lounge at Conference. The Lounge offered attendees a space to relax, learn about PLA resources and memberships, network with colleagues, and make their own souvenir buttons. New networking initiatives were launched, including "lunch buddy" meetups, knitting circles, and committee-led discussion groups around data, leadership, and EDISJ. The PLA Annual Conference continues to be a significant driver of membership, especially new members. From the start of registration opening (10/12/2023) through the end of conference (4/5/2024), PLA gained 1,496 new members. In a non-conference year (FY23), the same period only produced 101 new members. As part of PLA's conference scholarship program, we awarded 115 scholarship recipients with complimentary PLA/ALA membership. This allowed PLA to reach audiences that typically cannot afford to participate in PLA membership or are members of alternative associations. Recipients included students, early career librarians, non-salaried or support staff, NALCo members, past Spectrum Scholars, and small/rural library workers. The Virtual Conference facilitated networking discussion was also well received, so PLA is looking into how to repeat this model to add virtual networking opportunities as member benefits. In addition, PLA is planning to use the ALA e-Learning platform to host at least two free, member-only webinars in the next year. The new PLA website has also been updated to clearly display and promote member benefits and ways to get involved.

Samantha Lopez, PLA Marketing and Membership Manager, is serving on the ALA Working Group that is analyzing the feasibility of standardized dues rates. The Group has presented scenarios, gathered feedback from their divisions' stakeholders, and will present their findings and recommendation to the ALA Board at ALA Annual Conference in San Diego. With input from members and staff, the PLA Budget and Finance Committee has found that none of the scenarios presented are financially viable or sustainable for PLA and its members, and therefore recommend the group continue to explore member bundling options that benefit all divisions.

Reference and User Services Association (RUSA) (-4.31% YOY):

ALA American Library Association

The RUSA Member Engagement committee has been extremely active in many efforts this year to help increase member engagement and promote RUSA membership in general. Those efforts have included:

- Weekly trivia emails to engage with our members and highlight the Trivia Championship at ALA Annual. The open rate of these email promotions has greatly exceeded what is considered industry standard.
- Planned Coffee and Conversations Event at ALA Annual, which is a socializing event encouraging members to connect with each other as well as providing an opportunity for non-RUSA members to learn more about the division.
- Began work on the following two projects, which will come to fruition in FY 2024/25:
  - Highlighting RUSA members on the RUSA website
  - Developing regular emails to RUSA members who have not joined a section to ensure they receive regular communication from RUSA.
- Weekly "President Update" emails to the membership that have included messages from many committee chairs and other RUSA leaders
- Participating in a successful RUSA Virtual Forum that brought together all the RUSA Sections and Interest Groups to share their specific expertise around the Virtual Forum topic of Artificial Intelligence
- A coordinated promotional plan around "Giving Tuesday" which saw RUSA's giving increase over the prior year.

In addition, during the upcoming ALA Annual Conference, United board members will focus on peer-to-peer networking to promote United for Libraries membership. Board members will be present at all United programs to welcome attendees, engage in conversation, and answer questions about working with Trustees, Friends, and Foundations. Board members will also be available periodically in the ALA Connect Lounge.

Young Adult Library Services Association (YALSA) (-4.53% YOY):

Membership retention has been the primary focus of YALSA as recruitment activities are largely on hold due to limited staffing. YALSA has conducted several surveys, focus groups, and other methods to gain membership feedback and insights into membership desires and values. Additional activities from the YALSA Member of the Month, which is a campaign to highlight an active YALSA member volunteer's expertise through a post on the YALSA website and in the ongoing eNews. Volunteer recruitment efforts remain strong, particularly through encouraging potential volunteers to renew their membership and to access volunteer opportunities. The YALSA Programming Committee is in its second year and is offering more targeted and in demand programming for YALSA members. The YALSA weekly eNews goes out to members detailing membership resources and benefits to encourage engagement.

In November 2023, YALSA hosted the Young Adult Library Services Symposium where non-member Symposium attendees were encouraged to sign up for a YALSA membership and

receive a discounted Symposium registration rate. The Division Membership and Promotion Committee conducted a focus group of members and nonmembers who attended the YALSA Symposium. An action document inclusive of focus group feedback has been created by the YALSA Board to help inform the next strategic plan.

ALA Round Table Membership Recruitment and Retention Updates

The ALA Membership team is responsible for supporting membership recruitment and engagement across all round tables. While round tables activities are mostly driven by volunteers, there is some overarching recruitment that the membership team takes on. One of the most notable activities was building a Round Table Quiz which has been active for a year now (745 total views, 406 completions). This fun online quiz allows members to answer some simple questions so that they can customize their Round Table journey and pick the best fit for specific interests.

In addition, there is an effort underway to standardize the membership recruitment and renewal language on all Round Table websites, join pages and Get Involved pages. The guidelines should be ready by August for implementation.

Appendix: Unit Reports

The following ALA Units are reporting to the ALA Executive Board during their 2024 Summer Meeting, June 27 and July 1, 2024 and thus included as an appendix to the ALA Executive Director's Report.

Communication Marketing Media Office

Unit Manager: Jean Hodges
Revenue Stream(s) the Unit Supports:

☒Conference Services ☒Membership ☒Publishing

☒Continuing Education ☒Contributed Revenue

Unit Financial Report YTD:

	Actual FY to date	Budget	Variance
Revenues	$ 85,935	$ 2,333	$ 83,602
Expenses	468,845	345,997	(122,848)
Contribution Margin	(382,910)	(343,664)	(39,246)
Overhead Allocation			-
Net Surplus (Deficit)	$ (382,910)	$ (343,664)	$ (39,246)

CMMO's overall unit performance this quarter has seen some high points, such as the release of our book challenge numbers and the State of America's Libraries report during National Library Week, along with PSAs from our spokesperson Meg Medina and our support of the Reader.Voter.Ready. campaign. Since the April board meeting, we have launched a board newsletter, and we are starting work on an association-wide content calendar. The board's work with FleishmanHillard on messaging and strategic communications is being incorporated into a final communications plan to be presented at annual conference.

While CMMO is not projected to make budget this fiscal year, the board is aware of ALA's work with some unbudgeted vendors in the first quarter of the fiscal year, which were approved. With the exception of those commitments and an additional engagement with FleishmanHillard at the April board meeting to focus on strategic communications to clarify the board's vision and priorities in messaging, the CMMO budget is being managed as tightly as possible.

Recent accomplishments:

- Grew pageviews on ilovelibraries.com by 49% from Q3 2023. Growing this public audience is important to our strategy of launching a public membership program.
- How I Library podcast, which launched in February, has 4,492 listens, with the latest being an interview with Jason Reynolds. We are exploring revenue opportunities. This is another way of reaching a public audience important to our public membership model.
- Social channels during National Library Week 2024 showed higher engagement year over year. Engagement was up 12%.
    - Continue to support Conference Services with social media ads and other social posts, including PSAs from the board.

- Work with Transformers' owners Skybound Entertainment/Hasbro on assets for our Library Card Sign Up Month (September) partnership.
- Launch call for nominations for I Love My Librarian awards.

Conference Services

Unit Manager: Earla Jones
Revenue Stream(s) the Unit Supports:

☒Conference Services ☐Membership ☐Publishing

☐Continuing Education ☐Contributed Revenue

Unit Financial Report YTD: As of March 2024

	Actual FY to date	Budget	Variance
Revenues	$ 725,115	$ 6,147,819	$ (5,422,704)
Expenses	2,681,177	5,728,892	3,047,715
Contribution Margin	(1,956,062)	418,927	(2,374,989)
Overhead Allocation		1,631,822	1,631,822
Net Surplus (Deficit)	$ (1,956,062)	$ (1,212,895)	$ (743,167)

The revenue for the Annual Conference begins in the 3rd quarter of the fiscal year. Registration for the Annual Conference opened in February 2024. The total number of Annual Conference attendees is budgeted at 6,828 paid registrants (currently 6534). The total budgeted exhibitors is 400 (currently 499).

Registration is strong at 104% ($2.3M) of projected income ($2.2M). Exhibits income, which includes exhibit booth sales and sponsorship, is currently at 105% ($2.5M) or projected ($2.4M). The overall income for the Annual Conference is 104% ($4.9M), which is over the $4.69M budget. The Registration and Exhibit revenue for the Annual Conference this quarter exceeded anticipated at 104%, which is $4.9M of the $4.69M budget.

Conference Services activities for the remainder of the fiscal year include: (1) June – Execution of the 2024 ALA Annual Conference & Exhibition; (2) July – Conference Services, in conjunction with the LLX Subcommittee, will launch the call for presentations for the next LibLearnX: Library Learning Experience. The call will be open until mid-August. The event is scheduled for January 2025 in Phoenix, AZ; (3) August – Conference Services, with the ALA Conference Committee, will launch the call for presentations for the 2024 ALA Annual Conference. The call will be open until mid-October. The event is scheduled for June 2025 in Philadelphia, PA.

Development

Unit Manager: Alan Inouye
Revenue Stream(s) the Unit Supports:

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

Unit Financial Report YTD:

	Full year Budget	Actual	YTD Budget	Variance
Revenues	5,000,000	864,143	2,916,667	-2,052,524
Expenses	143,314	427,637	55,764	-371,873

ALA's 150th Anniversary Campaign currently dominates every aspect of the Development Office activities. This is not unexpected for an endeavor of this size and we believe the Campaign will reap benefits for many years to come.

The Development Office continues to benefit from Foundation and Corporate relationships built up over time and views its Corporate and Foundation Giving program as its current greatest strength.

Development continues to face major challenges due to capacity which directly affects our ability to prospect, cultivate and steward donors; grow the Annual Giving, Major Gifts, Individual Giving, and Corporate and Foundation programs; as well support other Units.

Development foresees ending the year with approximately $1.2M in Revenue, well short of its target but greatly improved from 3 years ago. In addition, expenses will exceed projections. The increase in expenses is due to outside professional services resulting from the 150th Campaign and through improved donor research capacity through contractors and software. Many of these expenses will be reflected in the 150th Campaign Budget next fiscal year rather than the general Development Office Budget, which should allow for better clarity regarding ROI of our expenses.

This Spring, ALA launched a search for the Director of Development position. This is part of ALA's efforts to improve the capacity of the Development Office and Development is grateful for ALA's Leadership's prioritization of adding staff and resources to Development.

Development wishes to express its great gratitude to IT for the improved website, which is an important tool for fundraising.

Development has greatly benefitted from the work of Janet Simon, a fundraising consultant brought in to support the 150th Anniversary Campaign. Development wishes to express its tremendous admiration and gratitude to Jim Neal and Christina Rodriques for their efforts as co-chairs of the 150th Anniversary Fundraising Committee. We also wish to thank Tami Blair for her amazing administrative support of the Campaign.

The Library Champion program continues to be strong in the face of industry challenges.

Remigio Torres, Development Office Operations Associate, continues his fine work in Customer Service and Data Processing.

Development continues to support other ALA in their fundraising efforts, including the identification of prospects, negotiation and drafting of Agreements, advising, and reporting.

ALA continues to benefit from multi-year grants brought in between 2020 and 2024. These grants typically included infrastructure support in addition to some pass-through funding. This structure is somewhat unusual for grant support and has allowed ALA to continue to cover the costs of some internal projects and staff positions.

Going forward, Development aims to address three major priorities: (1) support of the 150th Anniversary Campaign; (2) grow foundational aspects of the Development Office, including the Annual Fund, Major Gifts, Individual Giving, Planned Giving, Online Campaigns, and Corporate and Foundation support; and (3) increase office capacity.

Office for Intellectual Freedom

Unit Manager: Deborah Caldwell-Stone
Revenue Stream(s) the Unit Supports:

☐Conference Services ☒Membership ☒Publishing

☒Continuing Education ☒Contributed Revenue

Unit Financial Report YTD:

	Actual FY to date	YTD Budget	Variance
Revenues	$ 461,314	$ 180,376	$ 280,938
Expenses	574,808	266,048	(308,760)
Contribution Margin	(113,494)	(85,672)	(27,822)
Overhead Allocation			-
Net Surplus (Deficit)	$ (113,494)	$ (85,672)	$ (27,822)

Overall, the Office for Intellectual Freedom is operating at or slightly below budget, with continuing budgeted and unbudgeted revenue support for ALA's IF initiatives from individual donors and grants from foundations and IMLS. Actual expenses are showing in excess of budgeted expenses for FY24, due to the inclusion of all costs for Chapter Relations' December Advocacy Academy to OIF's expense lines, as well as unbudgeted expenses due to the delay of the Intellectual Freedom Summitt. In addition, cost savings from the Mellon Foundation grant have not yet been recorded in the actual results due to timing.

We anticipate closing the year at or near budget. Interunit transfers will be used to properly categorize expenses and revenues by the close of FY24. In addition, $176,000 in grant-funded support for staff salaries will be credited by the FY24 close, and OIF continues to receive financial support from members and outside donors. Banned Book Week revenues have met budget, and we expect strong sales of Banned Book Week materials over the summer months. We plan to closely monitor expenses for all projects to assure that we meet our budget as a general fund unit.

During the third quarter, OIF launched two major initiatives. **Law for Librarians/Lawyers for Libraries** hosted its first "train the trainer" cohort over the weekend of May 31-June 2, with ninety members attending an intensive workshop on the law applicable to libraries' intellectual freedom and privacy policies and practices. Attorneys taught sessions on the First Amendment, privacy laws, minors rights, copyright, and liability issues to participants. Members of the cohort have agreed to serve as legal information resources for their respective state chapters or school librarian association, and to conduct trainings in their states, broadening the availability of challenge support assistance to library workers. Law for Librarians/Lawyers for Libraries is supported by a grant from IMLS.

In addition, OIF opened applications for the **Intellectual Freedom Helplines** initiative, which will provide direct grants to state and regional library organizations to assist them in establishing an Intellectual Freedom Helpline in their state or expand upon existing efforts to support librarians and educators addressing censorship. Over the next two years, ten pilot program sites will receive funding and training to operate a confidential reporting system that will help connect those experiencing censorship attempts with professional support, in-state peers, and referral to ALA OIF as appropriate. Ten grants, each in the amount of $10,000, will be awarded by August 31, 2024. The Intellectual Freedom Helpline grants are made possible through the generous support of the Acton Family Giving and critical program support is provided by the Mellon Foundation.

Public Policy and Advocacy

Unit Manager: Alan Inouye (with Larra Clark)
Revenue Stream(s) the Unit Supports:

☒Conference Services ☒Membership ☐Publishing

☐Continuing Education ☒Contributed Revenue

Unit Financial Report YTD:

	Actual FY to date	Budget	Variance
Revenues	$ -	$ -	$ -
Expenses	1,492,742	1,574,179	81,437
Contribution Margin	(1,492,742)	(1,574,179)	81,437
Overhead Allocation			-
Net Surplus (Deficit)	$ (1,492,742)	$ (1,574,179)	$ 81,437

Larra Clark has been serving as interim director of PPA since the fall, working at 80% time for PPA and 20% time for PLA. However, the normal split is 50-50 and so the additional 30% of her salary and benefits since the fall need to be transferred; the IUT is pending. Thus, the actual net surplus is closer to 50,000.

The deputy director for state and local advocacy began in April and so the surplus will further reduce. Anticipate ending the year at or close to budget.

Federal Funding for Libraries: FY 2025 #FundLibraries campaign
PPA again led our annual campaign to gather signatures in the House and Senate for "Dear Appropriator" letters in support of FY 2025 funding for the Library Services and Technology Act (LSTA) and the Innovative Approaches to Literacy (IAL) program.
- More than 10,000 emails from advocates took action by emailing and/or calling their legislators.
- In the Senate, 41 signed the LSTA letter and 33 the IAL letter. Signatures for both letters were down by two from the FY 2024 campaign.
- In the House, 104 signed the LSTA letter and 61 the IAL letter.

PPA will narrow our advocacy efforts, working closely with advocates in states and districts represented by Appropriations Committee members. The House Labor-HHS subcommittee will mark up the bill on June 27, and the full committee markup will take place on July 10. Senate dates have yet to be disclosed.

Voter Engagement: Reader. Voter. Ready. https://www.ala.org/advocacy/reader-voter-ready
Leading up to the November 5 elections, PPA is collaborating with partners to provide nonpartisan resources and learning opportunities for librarians, including webinars, in-person workshops, fact sheets, ideas for civic engagement programming and one-pagers for select audiences.

- launched the campaign during National Library Week with a pledge
- announced a strategic partnership with the League of Women Voters and promoted a joint webinar slated for May 29
- will host a joint panel session at Annual covering best practices and innovative ideas for civic engagement and get-out-the-vote programs

Digital Equity:
PPA continues to engage policymakers in shaping the FCC's Learn Without Limits initiative:
- facilitated a "fireside chat" between FCC Chairwoman Jessica Rosenworcel and COL Chair Ed Garcia at the Connecticut Library Association conference in April
- reviewed FCC's proposed rulemaking on a three-year, $200 million pilot program to support cybersecurity services and equipment to protect school and library broadband networks
- met with FCC officials to discuss library priorities in the proposed hotspot lending program
- created resources to enable libraries to apply for Digital Equity Act resources

Intellectual Freedom:
- will host a webinar on fighting book bans for the library field on May 20, presented by members of the ALA Policy Corps cadre focused on fighting book bans
- in collaboration with OIF, PPA is organizing a Rally for the Right to Read on opening evening of Annual under the Unite Against Book Bans initiative

PPA is hosting several sessions at Annual related to the topics above.

PPA brought in a new team member in April, Amelia Aldred, as Deputy Director for State and Local Advocacy to support ALA chapters and others in fighting adverse legislation as well as to co-lead the Unite Against Book Bans initiative with the Office for Intellectual Freedom.