ALAAmericanLibraryAssociation

ALA Executive Director's Report to ALA Executive Board
Prepared by Tracie D. Hall
June 12, 2023

ASSOCIATION UPDATES AND HIGHLIGHTS

As it welcomes the American Library Association Annual Conference to its headquarters city of Chicago for the first time since 2017, the association finds itself above the 50,000 member threshold and successfully making tangible financial headway in short-term cash recovery, expense management, and contributed revenue. The restoration of membership numbers and signs of fiscal health come at a time when the larger library and information services sector is navigating the impact of not just censorship, but of the chilling effect the divisive debate over intellectual freedom is having on library funding and staffing. ALA's ability to provide education and professional development, standards for practice, technical assistance, an expanded pool of grant funding to libraries, and a community network (via Connect) that is experiencing high use and steep growth, is needed now more than ever given these critical times.

Annual Conference. As the largest gathering of library professionals in the world, ALA's 2003 Annual Conference (June 23-27) is on track to meet its goal of 9,230 paid attendees and over 14,000 attendees overall. At this writing, both the budget goals for registration and exhibits have been surpassed with nearly two weeks left to go before conference opening.

Conference attendees will have the opportunity to hear about the issues they care about: intellectual freedom; equity, diversity, and inclusion; mental health and wellness; library services for residents who are justice involved; family and adult literacy; digital skill development; and the role of school and academic libraries in scaffolding student success. Keynote speakers include such authors and leading thinkers as Judy Blume, Matthew Desmond, Rhiannon Giddens, Amanda Gorman, and Hinaleimoana Wong-Kalu among many others.

The **Rally for the Right to Read: Uniting for Libraries & Intellectual Freedom**, will serve as a fitting prelude to the conference program and is slated to be held at the Chicago Hilton on Thursday, June 22, 2023 from 6:00 to 9:00 pm. The program will feature anti-censorship activists from around the nation, the 2023 recipients of ALA intellectual freedom awards, and will be headlined internationally renowned author and scholar Dr. Ibram X. Kendi. The Rally for the Right to Read will recognize the 2023 recipients of the FTRF Roll of Honor Award, the Eli M. Oboler Award, the John Phillip Immroth Award, and the Gerald Hodges Intellectual Freedom Chapter Relations Award.

ALA is also set to bring back its **Community of Care** program which was piloted at LLX. Thirty members and staff will serve as visible ambassadors for this initiative intended to serve as an embodiment of the ALA Code of Conduct. The Community of Care effort at Annual will feature an expanded team of members and staff and will continue to have the following elements:

- 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. 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 on- and offsite programming activations.

- Social Network: ALA staff and members will wear ribbons and that identify them as Community of Care team members able to connect conference attendees to mental health triage services and other resources and support. An ALA staff member will serve as Conference Ombudsperson and point-person for Community of Care response coordination.
- Mental Health Support: ALA will have a licensed mental health professional onsite or on call during the entire conference.
- Massage Therapy: ALA will also offer massages from a licensed body worker on a first come basis in the quiet room located in the McCormick Convention Center.

Pivot Strategy Status Report

Reaching its midway mark, the ALA Pivot Strategy, created to span the fiscal years 2021-2026, still proves a salient framework for the coordination of strategy across ALA's 30+ units and 8 divisions. As this report will show, though membership gains are slow -- as to be expected in this inflationary economy in which library budgets have taken sharp hits – financial performance at the association continues to evidence discipline when it comes to spending and resourcefulness when it comes to developing new income streams and sources. There is currently over $8M cash on hand and the Executive Director and CFO are putting measures in place to create dynamic financial management systems to contain the revenue to expense ratio.

Membership is holding at the 50,000 mark. There has been a slight decline in student membership numbers that has occurred as more MLIS programs have gone mostly remote as a result of the pandemic. Anticipating the continuation of the trend, MRS and the Chapter Relations Office are working together with chapters nationwide to strategize interventions that can create stronger connections between individual students and the association. The association is also planning programming that will provide training and support to ALA and school library chapters across the country as a means of growing member outreach measures.

Conference Services continues to adjust to shifts in conference attendance seen across the meetings sector since the onset of COVID 19. While much of our attention has been focused on recovering our in-person conference attendance, Conference Services seeks to build a strategy that integrates both face-to-face and digital attendance. As well, we continue to look at opportunities to think about Conference Services in the larger education and professional development continuum.

Continued Education as mentioned in this report, has had some success working with state chapters and with some of the smaller divisions as the curator and disseminator of learning modules. Progress is being made in expanding the regional client base. As well, there is an effort to include CE offerings as an amenity for recipients of ALA grants, a benefit that can extend learning opportunities. The CE unit is also preparing to formally launch its brand, 'ALA Learning' before Annual 2023. This launch will make ALA's online educational offerings mor visible to prospective clients.

Publishing and Media continues to fight against declines in overall book and product spending as library budgets constrict. Yet, there is solid evidence from the Avenue M study that members highly value the association's publications, from *American Libraries* and *Booklist* to ALA Editions and Neal-Schuman titles. The "Free People Read Freely" branded merchandise is sharply increasing in sales as intellectual freedom stakeholders seek to wear their values. Making merchandise that supports library professionals and libraries more visible to the general public is a goal as Banned Books Week arrives this Fall.

Data, Design, and Research is on target for reaching one of its initial goals of standing up ALA's first automated performance monitoring system which will preview at the June Executive Board session. Overseen by the IT department, this data system will aggregate a number of current ALA technologies and serve to analyze the association's performance and strategic goal management data. The work of building a robust performance management system using the Association Analytics technology platform is making headway, with a goal of introducing a beata test of the platform at the upcoming Annual Conference Executive Board meeting.

Contributed Revenue which brings together the work and strategy of the Development and Public Programs Offices leading major restricted and unrestricted development, while the divisions are currently the locus of the most significant corporate or in-kind donations or partnerships. This quarter the Development Office exceeded its projected $4.5M goal. To support this work the association is readying to hire its first Institutional Advancement, Public Programs, and Partnership. The search committee has been selected and it is expected to meet after Annual Conference.

Programmatic Priorities

Biden Administration announces new anticensorship measures. Earlier this month ALA issued a public release applauding the Biden-Harris Administration's steps to address book bans and other attacks on LGBTQIA+ Americans. The White House announced that the Department of Education will appoint a new coordinator to address the growing threat that book bans pose for the civil rights of students and LGBTQIA+ Americans.

ALA President Lessa Kanani'opua Pelayo-Lozada was quoted in the statement as saying: "We are heartened by the Biden-Harris Administration's leadership to address the alarming rise in book bans and other attacks on LGBTQIA+ Americans that aim to stigmatize and erase the voices of the LGBTQIA+ community. Everyone deserves the opportunity to see themselves and their family reflected in the books in their library's collection."

Increasing access to literacy instruction for adults. Annual Conference will feature a mainstage program highlighting ALA's ongoing commitment to Education and Access in the form of increasing access to literacy instruction for English and non-English speakers across the nation. In 2022, ALA joined a consortium of peer organizations led by the Barbara Bush Foundation for Adult Literacy, Coalition on Adult Basic Education, the Center for Family Literacy, the Mayor's Office for Adult Literacy at Houston Public Library, and including the National Coalition for Literacy which ALA helped to found, Pro-Literacy, Teaching English to Speakers of Other Languages, and others. The panel will feature Barbara Bush Foundation CEO, British Robinson; Rhea Brown Lawson, Houston PL's executive director; and library and literacy practitioners leading this work across the country. Working with ODLOS, the Committee on Literacy, and the Center for the Future of Libraries, ALA will use this opportunity to announce a new grant opportunity for the expansion of literacy instruction through partnerships between libraries and community-based organizations engaged or vested in the advancement of literacy in high need areas.

Protecting Intellectual Freedom. Having **attracted nearly [90 national and regional partners,](#)** Unite Against Book Bans campaign remains one of the most visible current anticensorship campaigns. In April, National Library Week launched with its first day dedicated to showcasing the "Right to Read!" The entire week highlighted numerous UABB resources and offerings. This lifting up of ALA's anticensorship programming come after the Los Angeles Times announced that the Freedom to Read Foundation (FTRF) will receive its LA Times Book Festival 2022 Innovator's Award, which "spotlights efforts to bring books, publishing and storytelling into the future." Julia Turner, Deputy Managing Editor of Entertainment and Strategy for the Times said at the award's

announcement, "The organization is as important and relevant today as it was at its inception in 1969," says. "We honor its continued fight against book bans and its mission to protect all Americans' right to read and access information." ALA is also gearing up for Banned Books Week this fall as well as continued discussion and planning around an Intellectual Freedom convening next January, both of which will be discussed extensively in upcoming board meetings. The current staff capacity in OIF has been increased with a goal of ultimately getting to 6 FTE (almost triple the number in FY 22) by FY24. Last month OIF published an ad for Deputy Director for OIF, a position that will require a law degree, and will seek to hire additional staff to expand administrative and field mobilization capacity.

Missouri and library funding legislation. Though Sen. Lincoln Hough, who chairs the Senate Appropriations Committee, vowed to restore the state funding for Missouri's public libraries that was removed out of the House iteration of the state's spending plan, the initial vote to defund public libraries in Missouri in late May shocked library advocates and will no doubt create a precedent that looms large given the way that libraries have been a chief target in the current divisive political arena.

The Public Policy and Advocacy Office has recently supported more forward looking legislation out of Missouri, the *Prison Libraries Act* introduced in April by U.S. Representatives Emanuel Cleaver, II (D-MO), Sheila Jackson Lee (D-TX), and Shontel Brown (D-OH). The act would expand library resources in U.S. state and territory correctional facilities to advance reintegration efforts, reduce recidivism, and increase educational opportunities for incarcerated citizens. This bill proposes to authorize $60,000,000 over six years for state prisons to build library services and resources. The bill is currently supported by 25 co-sponsors and endorsed by 17 organizations from across the country.

Library Services for the Incarcerated and Detained. Led by almost three dozen association members and library practitioners working in or with lived experience in this area of service, the draft of the Standards in this area is on track to be published after Annual 2023. There is also some early indication that this work, which has engaged select policymakers may have the opportunity to positively influence future legislation, a possibility ALA is continuing to monitor. Ahead of the launch of the Standards, a much-awaited updated resource page has been made available on ALA's website. See here: Expanding Information Access for Incarcerated People Initiative | About ALA

Staffing Updates

ALA has made progress in filling key positions and in launching ads for others. In the past few months, the following positions have been filled: **Awards Coordinator (ALSC); Conference Deputy Director -- Content (Conference Services); Editor (American Libraries); Marketing Manager (ALA Editions); Business Analyst (IT);** and **Accounting Manager (Finance); Assistant Director, Communications (OIF);** and **Assistant Director, Membership (OIF).**

The Association of College and Research Libraries (ACRL), a division of the American Library Association, announces key leadership changes as it progresses towards the beginning of the next fiscal year. **Robert "Jay" Malone**, who came to ACRL in September 2021 after previously helming an academic society for over twenty years, departed ALA on June 9. During his time at ACRL, Malone supported the repositioning and improved profitability of Choice, a publishing unit of ACRL and worked with ALA's Development Office to raise the association's GuideStar (Candid) nonprofit ranking to "platinum," the reviewer's highest level. Malone was succeeded by interim ACRL executive director **Allison Payne**, who stepped into her new leadership role on Monday, June 11. Payne joined ACRL in 2013 and has since served in governance (among other duties) by

supporting the work of the ACRL Board of Directors and ACRL Budget and Finance Committee. Prior to her new appointment, Payne served as ACRL Program Manager for Strategic Initiatives, leading equity, diversity, and inclusion initiatives and helping shepherd various projects—including the creation of the joint ALA/ACRL/ARL/PLA Cultural Proficiencies for Racial Equity: A Framework and the assessment and redevelopment of the ACRL Diversity Alliance program. In 2022, Payne was selected as a participant for the Path to Leadership program, a joint effort sponsored by the Institute of Museum and Library Services (IMLS), with the Chinese American Librarians Association (CALA) and the Asian Pacific American Librarians Association (APALA). She holds a Master of Library and Information Science from the University of Wisconsin-Milwaukee and a Bachelor of Arts in English, with a minor in Psychology, from the University of Iowa. On June 16, ACRL said goodbye to longtime staff member and current Senior Strategist for Special Initiatives **Kara Malenfant.** Since joining ACRL staff in September 2005, Malenfant has coordinated the division's government relations advocacy, scholarly communication activities, and Value of Academic Libraries initiative and co-developed and managed ACRL's Consulting Services Program. Finally, ACRL is pleased to announce the promotion of **Rachel Hendrick** to permanent editor and publisher of *Choice.* Rachel joined ALA in 2014 as Operations Manager at Choice and was promoted to Director of Operations at Choice in April 2016. She has served as Interim Editor and Publisher of Choice since April of 2022. Rachel began her career in publishing at LIFE magazine and has worked at various national and international publishing houses including Readers Digest, Conde Nast, and Sotheby's auction house. She was metadata lead on the redesign of Choice Reviews, has initiated many cost-saving initiatives including the move to a new subscription and fulfillment vendor, and was project lead on the relaunched Choice360.org. As part of this site redesign, she worked with the Choice team to launch two blogs: Toward Inclusive Excellence (TIE), which focuses on equity, diversity, and inclusion; and LibTech Insights (LTI) which delivers actionable advice for librarians and tech professionals across academe. In 2007, she was awarded a Master's Degree in Library and Information Science with a concentration in Rare Books and Special Collections from Long Island University and in 2023 received her MA in history from the University of Connecticut. She also holds a Bachelor's of Fine Arts from Pratt Institute where she studied art hist*ory.* ACRL is grateful to its departing colleagues and looks forward to supporting new leadership in building on their dedicated work.

We are also pleased to note that the following senior level search committees have launched: **AED-PPA; Director, CMO;** and **YALSA ED.** Applicants for the **Deputy Director, OIF** position which will now require a law degree and extensive background in intellectual freedom are being reviewed. As well, ALA seeks to launch its searches for **Director of Institutional Advancement, Public Programs, and Partnerships**; **MRS Director;** and support positions for **AASL, ALSC, ACRL, HR, ODLOS,** and **IT** shortly.

REPORTS OF ALA UNITS

AMERICAN ASSOCIATION OF SCHOOL LIBRARIANS (AASL)

Unit Manager: Sylvia Knight Norton

# of Staff: 4 including division executive director

Revenue Stream(s) the Unit Supports:

⊠Conference Services ⊠Membership ⊠Publishing

⊠Continuing Education ⊠Contributed Revenue

Unit Financial Report YTD:

Revenues	Actual FY to date	Budget	Variance
Financial Summary			
March 31, 2023			
	Actual FY to date	Budget	Variance
Revenues	$ 304,875	$ 342,637	$ (37,762)
Expenses before Overhead	338,115	362,249	24,134
Contribution Margin	(33,240)	(19,612)	(13,629)
Overhead Allocation	1,943	700	(1,243)
Net Surplus (Deficit)	$ (35,183)	$ (20,312)	$ (14,871)

Statement of Division or Unit Financial Performance:

The membership dues projections are below budget by 28% despite being a conference year. Other revenue from publications and admin fees from this quarter's activities will be shown in future monthly reports. This March report also includes $1881 for prepaid National Conference expenses that should be deferred to FY24 for all conference expenses and revenues.

Statement of Assumptions or Projections for the remainder of the Fiscal Year:

Travel expenses have been reduced $9,000 for the remainder of the budget year with another $18,700 for a project rescheduled to October. Revenue from the AASL Standards and related publications with ALA Editions are transferred twice a year and are on track for projects in August.

Status Report on Pivot Strategy, Aligned Unit Goals:

Membership engagement continues to be a priority for AASL and there are new members each month, but with the exodus of educators nationally and concerns among school librarians, the overall number has not significantly changed. AASL's goal to increase revenue is focused on the demands for planning the AASL National Conference that will be held

in October.   The initial exhibit space has been expanded and at this time the registration is outpacing the last pre-pandemic 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 activates leadership by providing opportunities for AASL members to be authors. The publication of the AASL Knowledge Quest journal is especially important since two others focused on school libraries have ceased publication. In conjunction with ALA Editions, AASL also publishes titles related to the AASL Standards. Recently released are *Engage* by Katherine Roots Lewis and Marcia Mardis, and *Embracing Culturally Responsive Practice in School Libraries* by Elisabet Kennedy. Three more books are in production to be in the bookstore at the AASL National Conference. The AASL Board of Directors continue to stand with members and colleagues in Florida despite the political climate by confirming the National Conference is to be held in Tampa in October.

# of Members (for Divisions):   5,183

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

Views to the AASL website skyrocketed with 17,198 pageviews to the School Library Month webpage. Other highly viewed pages include AASL national conference landing page and the School Library Event Promotion page. In the two weeks since the announcement of the 2023 Best Tools for Teaching & Learning, the page has garnered 10,292 pageviews.

AASL held several events, with various levels of registration. Webinars Artificial Intelligence in the School Library (243), Empowering Next Gens with Media Literacy (75); and the monthly AASL Town Halls to Celebrate School Library Month (145), Supporting Equity, Choice, and Student Voice in the Library (98) and the virtual Annual Membership Meeting (109)

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

AASL distributes materials to the AASL Chapters for their state conferences. AASL Chapters held seven conferences. As part of the leadership travel rotation, the AASL President-elect attended and presented at the Maryland conference. This longstanding program for AASL provides a unique connection to ALA leadership as state school library associations are often not part of an ALA Chapter.

AASL continues to see increased engagement on all social media platforms thanks to the work of the AASL National Conference Social Media and School Library Event Promotion Committees. The fastest growth of new followers is on TikTok. Engagement on Instagram continued to grow, as educators interact with AASL23 Conference trivia posts, School Library Month, and AASL Instagram takeover day from our AASL Chapters. AASL also increased posts sharing information from our partner organizations.

Describe the Most Impactful Unit Activities this Quarter:

AASL leaders have worked diligently for the last few years on developing a bill for federal legislation to support school libraries. This has moved forward this last year, working collaboratively with ALA Public Policy and Advocacy staff as well as the staff of Senator Reed's and Representative's Grijalva's office to introduce the Right to Read Act in October of 2022 and then to reintroduce the Right to Read Act 2023 during National Library Week in April 2023. The bills have been endorsed by ALA, AASL as well as the National Education Association (NEA), American Federation of Teachers (AFT), National Council of Teachers of English (NCTE), and PEN America.

Important Activities and Events Planned Through End of Next Fiscal Quarter:

The biennial AASL National Conference will be held in Tampa in October 2023. AASL staff and members are highly focused on the work required to make this one of our most successful events.

ASSOCIATION OF COLLEGE AND RESEARCH LIBRARIES

Unit Manager: Allison Payne (as of June 11, 2023. Jay Malone departed June 9)
# of Staff: 11

Revenue Stream(s) the Unit Supports:

⊠Conference Services ⊠Membership ⊠Publishing

⊠Continuing Education ⊠Contributed Revenue

Unit Financial Report YTD:

Financial Summary March 31, 2023	Actual FY to date	Budget	Variance
Revenues	$ 3,054,249	$ 3,061,348	$ (7,099)
Expenses before Overhead	2,105,349	2,571,131	465,782
Contribution Margin	948,900	490,217	458,683
Overhead Allocation	358,726	499,668	140,941
Net Surplus (Deficit)	$ 590,174	$ (9,451)	$ 599,625

Statement of Division or Unit Financial Performance:

ACRL's FY23 Q3 performance report from ALA shows a strong positive net. Although revenue projections were slightly under budget, expenses were below budget by almost $600,000, leaving us with a net of $591,548. However, this report runs only through April, which means that although we have been able to count most of the revenue associated with the 2023 conference, we are still adding expenses and those will be considerable. On the revenue side, we saw healthy budget surpluses in several areas, e.g., *C&RL News* ($56,110, which includes our share of ALA JobLIST revenue) and non-periodical publications ($44,636).

Statement of Assumptions or Projections for the remainder of the Fiscal Year:

Although membership revenue fell slightly compared to FY22, membership numbers did increase since the start of FY23, likely due to the conference. Significantly, we saw a healthy increase in new memberships (14.69%) compared to FY22. The team's care in budgeting provides confidence in the remaining year's numbers. For example, with no historical data to make projections for a post-pandemic meeting, revenue for the Pittsburgh conference was almost spot on, exceeding

budget by $1,054, a variance of .05%! Planning for the first in-person Rare Books and Manuscripts Section meeting in 3 years is proceeding well, with registrations on target for this hybrid event.

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 were not 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.

As of the April 2023 official count, individual ACRL membership stands at 7,925, organizational membership stands at 504, and corporate membership stands at 18, for a total membership of 8,447.

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

Every two years, the ACRL Research Planning and Review Committee releases an environmental scan of higher education, including developments with the potential for continuing impact on academic libraries. The **2023 Environmental Scan** (PDF) provides a broad review of the current higher education landscape, with special focus on the state of academic and research libraries.

Among a variety of issues, the scan highlights the continued shift in library instruction reflecting "… a broader trend in higher education, library pedagogies have also been evolving toward inclusive practices, evidence-based teaching, and critical discourses." The scan also notes that a "… continuing trend in library pedagogy has been an effort to extend and innovate on ACRL's Framework for Information Literacy for Higher Education.

To assist academic libraries in meeting these trends, ACRL has acquired the Threshold Achievement Test for Information Literacy (TATIL), an online information literacy assessment instrument developed by Carrick Enterprises, Inc. TATIL is a simple, easy-to-use standardized test that measures the achievement of the information literacy education outcomes, regardless of a student's major or research focus, across four modules which address learning across all the frames in the ACRL Framework for Information Literacy. Following a redesign and rebuilding period, TATIL will relaunch under the ACRL brand in summer 2023.

# of Members: 8,447

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

- Paid online learning attendance: 249 individuals
- Newsletter total opens: 213,554
- Print and ebooks sold/distributed: 2,262
- Journal website total views (*C&RL*, *C&RL News*, *RBM*): 780,411
- ACRL website total visits: 177,911
- Facebook: 48,600 impressions; 3,482 engagements
- Instagram: 20,286 impressions; 977 engagements
- Twitter: 109,750 impressions; 3,534 engagements
- YouTube: 10,710 views; 1,630 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 three live webcasts and one online course during this report period. 249 individuals participated in e-Learning focusing on active learning techniques, universal design, strategies for adult learners, and navigating artificial intelligence in academic libraries. Upcoming topics include thriving as a mid-career librarian and AI and critical information literacy.
- Four new ACRL books were published during Q3 of FY23—including one open access, digital-only publication— and were promoted for purchase to members, other stakeholders, and at the ACRL 2023 Conference in March. 1,562 print and individual-use ebooks were sold, along with around 700 institutional ebook copies via distributors.

Describe the Most Impactful Unit Activities this Quarter:

ACRL 2023 Conference Update
The ACRL 2023 Conference, "Forging the Future," was held March 15- 18, 2023, in Pittsburgh and virtually. The conference hosted 2,140 paid in-person and 717 paid virtual attendees, including 1,109 first time attendees, for a total of 2,857 total paid attendance. Paid registration revenue came in at 106% of budget. Total attendance of 3,747 included paid attendees, exhibitors, staff, suppliers, and press. ACRL also awarded 100 scholarships for the conference in six categories, worth $89,081.

2023 ACRL Election Results

Choice's 'The Authority File' Podcast Wins 2023 Publisher Podcast Award

Revised ACRL Standards for Distance and Online Learning Library Services

Important Activities and Events Planned Through End of Next Fiscal Quarter:

The RBMS 2023 Conference, "A New Kind of Professional," will be held June 26-30, 2023, at Indiana University Bloomington and virtually. RBMS 2023 will explore how we educate both new and established workers at a time when the need to reframe and reimagine our collections and audiences is even more vital. The conference will address questions of not only how to welcome, prepare, and retain new workers for the increasingly complex demands of GLAMS (Galleries, Libraries, Archives, Museums, and Special Collections) professions, but one that addresses continuing education framed around changes in critical library theory and new approaches to our collections and careers.

ASSOCIATION FOR LIBRARY SERVICE TO CHILDREN (ALSC)

Unit Manager: Alena Rivers

# of Staff: 5

Revenue Stream(s) the Unit Supports:

☒Membership

Unit Financial Report YTD:

Financial Summary March 31, 2023	Actual FY to date	Budget	Variance
Revenues	$ 1,083,955	$ 1,114,962	$ (31,006)
Expenses before Overhe	649,953	694,194	44,240
Contribution Margin	434,002	420,768	13,234
Overhead Allocation	132,536	148,369	15,833
Net Surplus (Deficit)	$ 301,466	$ 272,399	$ 29,067

Statement of Division or Unit Financial Performance:

As of March 2023, ALSC is seeing a net surplus of $301,466 which is over the budgeted net by $29,067. The most significant variances fall under membership dues and seals sales. ALSC membership numbers have decreased likely, in part, due less dedicated staff time on cultivating membership. Print and digital seals sales remain lower than expected as publishers navigate budget constraints. The returns/credit expense is being investigated as it is higher than anticipated.

Statement of Assumptions or Projections for the remainder of the Fiscal Year:

ALSC will see an increase in both revenue and expenses attributed to the Newbery-Caldecott-Legacy Banquet to be held at Annual Conference. The banquet is budgeted at a break-even amount but is expected to generate revenue of approximately $7,000 due to lower than expected attendance resulting in lower food and beverage costs. Seals sales revenue may increase as, in some years, publishers make larger seals purchases around June-August in anticipation of holiday book sales. ALSC may see a slight increase in membership dues revenue as more concerted efforts are made to reach lapsed members.

Status Report on Pivot Strategy, Aligned Unit Goals :

The ALSC Board of Directors has been working to develop the 2023-2036 ALSC Strategic Plan, which will align with the ALA Pivot Strategy. Updated Pivot Strategy goals for ALSC will be determined alongside the development of the Strategic Plan. Currently, ALSC works to evaluate and identify new opportunities within the continuing education portfolio to increase member value and customer base. ALSC also seeks to implement strategies and resources that clearly articulate the value of ALSC and ALA membership resulting in an increase of ALSC's membership. Finally, ALSC seeks to develop a content strategy to maximize the monetization of new publication and product lines to new audiences/markets while building awareness of the ALSC brand.

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 membership remain prominent, and include issues focused on censorship, collection development attacks and hiring in library services. ALSC committees continue to share information related to reconsideration and book challenges. In response to continuing upticks in book challenges and new laws, which disproportionately target our BIPOC and LGBTQIA+ colleagues, authors / illustrators, and readers. Censorship includes requests for purchase demands from library staff and patrons that highlight a disconnect between current collection development policies and harmful and/or inaccurate materials. Additionally, libraries are struggling to

fill youth staff positions prompting library leaders to revisit education and experience requirements for professionals working with youth.

# of Members (for Divisions): 3,179

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

- 3,410 – Members (reached through various division-organized outreach, such as email marketing; Bechtel webinar, which is member-exclusive)
- 97.3K – Impressions made on Twitter (25.5 March; 40K April; 31.8K May)
- 9,857 – Reach of FB posts
- ~125 – In-person attendees at the 2023 Children's Literature Lecture feat. Bryan Collier (April 12)
- 15 - YMA Book Chats (March)

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

April 2023 membership reports reflect a 6.79% decline in overall ALSC members, compared to April 2022 and a small decline since Q2's reporting. In the absence of a membership staff member, current staff are making concerted efforts in member outreach, retention, and reengagement to slow the member decline and, ideally, raise membership numbers.

- Hosted 13 members and nonmembers in the pilot ALSC Book Chats program.
- Welcomed ~125 members and nonmembers to the 2023 Children's Literature Lecture, featuring Bryan Collier, in Dayton, OH, on Wednesday, April 12, 2023.
- Registered 40 members for the ALSC Community Forum on March 15, 2023.
- Registered 22 members and nonmembers and had 17 attendees at the ALSC Quarterly Virtual Gathering on Thursday, May 18, 2023.
- Hosted New BIPOC Membership Group Meeting via the ALSC Membership Committee sub-group on May 21, 2023.

Describe the Most Impactful Unit Activities this Quarter:

2023 YMA Book Chats - ALSC piloted informal book chats to build on the excitement of the YMA Press Conference and to pilot a potential revenue driver with the organization. While enrollment was low, those who participated enjoyed the conversations. ALSC plans to offer the chats again next year with an eye toward building enrollment.

2023 Children's Literature Lecture - ALSC participated in the annual Children's Literature Lecture on Wednesday, April 12 at 7pm at the University of Dayton Kennedy Center, hosted by Dayton Metro Library and the University of Dayton. The lecture featured Bryan Collier and welcomed roughly 125 members and non-members.

Important Activities and Events Planned Through End of Next Fiscal Quarter:

2023 Annual Conference Session - We Need Diverse Books and ALA Present: How to Fight Books Bans: Authors On Speaking Up and Fighting Back - ALSC has partnered with WNDB, by way of founder and CEO Ellen Oh, to offer a one-off panel at Annual Conference focused on book challenges and creators' experiences in fighting those challenges. The panel includes Oh as moderator, and panelists Samira Ahmed; Jerry Craft; Ashley Hope Perez; Kyle Lukoff; and Eliot Schrefer.

ALA OFFICES AND MEMBER RELATIONS (AOMR) AND LIBRARY (LIRC) AND ROUND TABLES

Unit Manager: Melissa Walling

# of Staff: 4 (additional staff support provided by round table staff liaisons across ALA)

Revenue Stream(s) the Unit Supports:

☒Membership

☒Contributed Revenue

Unit Financial Report YTD:

AOMR:

Financial Summary March 31, 2023	Actual FY to date	Budget	Variance
Revenues	$ 10,120	$ 19,250	$ (9,130)
Expenses before Overhead	189,558	200,888	11,330
Contribution Margin	(179,438)	(181,638)	2,200
Overhead Allocation	-	-	-
Net Surplus (Deficit)	$ (179,438)	$ (181,638)	$ 2,200

Library (LIRC) Office Budget:

Financial Summary March 31, 2023	Actual FY to date	Budget	Variance
Revenues	$ -	$ 31,218	$ (31,218)
Expenses before Overhead	173,701	211,744	38,043
Contribution Margin	(173,701)	(180,526)	6,825
Overhead Allocation	-	-	-
Net Surplus (Deficit)	$ (173,701)	$ (180,526)	$ 6,825

Round Tables:

Financial Summary March 31, 2023	Actual FY to date	Budget	Variance
Revenues	$ 293,928	$ 297,143	$ (3,215)
Expenses before Overhe:	103,704	205,255	101,552
Expenses before Overhea	190,224	91,887	98,337
Overhead Allocation	17,215	9,085	(8,130)
Net Surplus (Deficit)	$ 173,009	$ 82,802	$ 90,207

Statement of Division or Unit Financial Performance:

Budgeted revenue for the library was related to a grant and that was reflected in our actuals as a negative expense. Therefore, no revenue is expected for the fiscal year, but the net impact is neutral.

Revenue for AOMR is based on HRDR educational sales which have been lower than anticipated.

The primary driver of revenue for Round Tables is membership dues, which are on track.

Statement of Assumptions or Projections for the remainder of the Fiscal Year:

The Library Budget is anticipated to end the year with a slightly favorable variance. The AOMR budget is not expected to hit the revenue goal, but we are working to contain expenses to balance this.

A few Round Tables have a negative variance which is mostly due to timing issues of items related to Annual Conference. There are also a few examples of unbudgeted expenses for items like printed newsletters or AV costs for Annual. Detailed responses for Round Tables with a negative variance are found in the Financial Update.

Status Report on Pivot Strategy, Aligned Unit Goals:

All Round Tables remain focused on delivering a quality membership experience and delivering member value. ALA Round Table membership continues to increase each year, especially as we welcomed two new Round Tables this fiscal year – Coretta Scott King Book Awards Round Table and the Library Support Staff Round Table.

AOMR also hosted four Round Table trainings including how to read financial statements, how to launch a scholarship/grant, how to submit a request for an Emerging Leader, and how to work with the ALA Archive. President-Elect Emily Drabinski also hosted a conversation with incoming Round Table Chairs, and we plan to continue that during the course of FY24.

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

AOMR staff have remained focused on preparing for the ALA Annual Conference and supporting Round Table volunteers in their work leading up to Annual.

The Library staff have been supporting the upgrade of the ALA Web site Project and archiving content. Their work has been instrumental in supporting the execution of this organization wide project. They have also worked closely with our staff at the University of Illinois on the archive and migrating content to the ALA Institutional Repository (ALAIR).

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

All Round Table members, and members who engage with the ALA Library.

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

AOMR Units and Round Tables provide ongoing support and engagement for members.

Describe the Most Impactful Unit Activities this Quarter:

The ALA Library has been working alongside a member working group to prepare an ALA LibGuide designed to help all types of libraries explore primary sources available from the Library of Congress online collection. They have facilitated various meetings and work with the members and are gearing up for the release of the LibGuide and a News You Can Use Session at Conference. Join them on Saturday, June 24th at 11:00am for the program.

Important Activities and Events Planned Through End of Next Fiscal Quarter:

ALA Annual is the primary engagement point for Round Tables. Round Tables are hosting presidential programs, awards programs, membership meetings, social events, and larger celebrations such as the Rainbow Round Table 50th Anniversary Celebration.

The ALA Library is also working with the ALA Archive on a representation of items from the ALA Archive related to Intellectual Freedom. This aligns with the Intellectual Freedom Round Table anniversary and will visually demonstrate the associations' long-standing commitment to protecting the right to read.

CHAPTER RELATIONS OFFICE (CRO)

Unit Manager: Michael Dowling

# of Staff: 1.5

Revenue Stream(s) the Unit Supports:

☒Conference Services ☒Membership ☐Publishing

☒Continuing Education ☒Contributed Revenue

Unit Financial Report YTD:

Financial Summary			
March 31, 2023			
	Actual FY to date	Budget	Variance
Revenues	$ 6,424	$ -	$ 6,424
Expenses before Overhe	75,587	102,057	26,470
Contribution Margin	(69,163)	(102,057)	32,894
Overhead Allocation	-	-	-
Net Surplus (Deficit)	$ (69,163)	$ (102,057)	$ 32,894

Statement of Division or Unit Financial Performance:

Revenue has exceeded year-end expectation of $3,000. Expenses continue to be below budget.

Statement of Assumptions or Projections for the remainder of the Fiscal Year:

CRO expects to end the year with around $10,000 in revenue, and to have expenses reduced by at least $25,000 due to Mellon grant support.

Status Report on Pivot Strategy, Aligned Unit Goals:

Promoted Annual Conference to Chapter with special focus and partnership with chapters in the region

Two Chapter Advocacy Exchanges- Intellectual Freedom with OIF and Digital advocacy campaigns with NYLA. Twenty chapters attended at least one of the exchanges.

Provided one-on-one advocacy support and consulting to 16 ALA Chapters and directly supported 12 chapters with campaigns in OneClickPoltics.

In April, launched 'ALA Building Library Capacity Grants' initiative funded by Mellon. Will award $10,000 each to up to 16 academic libraries located at designated Minority Serving Institutions (MSI).

With the Membership unit recruited Canadian students with discounted membership promotion.

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

Concerns of more censorship legislation being passed in state legislation across the country and local censorship attempts.

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

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

120 Student Chapter Leaders at 60 Student Chapters.

1,000+ members and non-members at the Texas, Florida, and Illinois conferences

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

Working closely with the OIF and PPA provided appreciated support to sixteen state chapters involved in potentially detrimental legislative battles and a few positive ones.

Continuation of Chapter Advocacy Exchanges drew leaders from twenty chapters with positive responses.

With promotion to Canadian students re-engaged with the eight LIS programs in Canada.

Describe the Most Impactful Unit Activities this Quarter:

Efforts to assist Chapters with their advocacy efforts, including setting up multiple actions in their state OneClickPolitics sites, including in North Dakota where the governor ended up vetoing the worst of two bills and amplifying actions from the Missouri Library Association to ensure state funding to libraires was not cut.

Important Activities and Events Planned Through End of Next Fiscal Quarter:

New Chapter Leader's Orientation in June for those assuming new leadership roles from this spring which will be followed by an in-person Chapter Leader's Forum at Annual. Working with the review panel to select the Building Library Capacity Grant awardees and announcing ahead of ALA Annual. Creating and sending out the 2023 State of the Chapters survey. Engaging Student Chapters (faculty liaisons and student leaders) in July and August for assistance in promoting ALA joint student memberships to all incoming students.

CHOICE

Unit Manager: Rachel Hendrick

Number of Staff: 18

Revenue Stream(s) the Unit Supports:

⊠Publishing

Unit Financial Report YTD:

Financial Summary March 31, 2023	Actual FY to date	Budget	Variance
Revenues	$ 1,232,110	$ 1,290,064	$ (57,954)
Expenses before Overhead	1,179,963	1,210,713	30,750
Contribution Margin	52,147	79,351	(27,204)
Overhead Allocation	160,828	172,525	11,697
Net Surplus (Deficit)	$ (108,681)	$ (93,174)	$ (15,507)

Statement of Division or Unit Financial Performance:

Choice started the 3rd quarter of FY23 with a net operating income of negative $108,681 with revenues of $1,232,109 and expenses of $1,340,790. Revenue was $57,955 behind budget due to poor performance of our webinar and print advertising programs. On the expense side, our payroll costs are running slightly ahead of budget, but we are making it up by reducing expenses in other categories.

Statement of Assumptions or Projections for the remainder of the Fiscal Year:

Choice will make up some current shortfalls in licensing and advertising revenue by the end of the fiscal year, but we will continue to watch spending so we can finish the year on budget.

Status Report on Pivot Strategy, Aligned Unit Goals:

In the last few months, Choice has done some cross promotion with CORE and ALA's eLearning site. CORE promoted our LibTech Insights content vertical to their membership, and we promoted Nicole Hennig's AI Literacy webinar via our LibTech Insights content vertical. We also started putting together an RFP to consolidate subscription and fulfillment across the association into one vendor. Finally, Choice's IT department has been collaborating with ALA IT to move all Choice employees onto the @ala.org email server.

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

Choice's LibTech Insights content vertical has leveraged the sudden interest in all things AI to increase engagement. Our post "Do We Need Librarians Now that We Have ChatGPT" garnered over 3,000 views and sparked conversations on both social media and on private Teams and Slack channels. This also boosted our newsletter signups for LibTech Insights.

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

- Subscriptions: 1,364
- Newsletters: 21,119 (not unique subscribers)
- Podcast: 5,250
- Webinars: 11,277 (not unique)

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

Engagement on the Toward Inclusive Excellence (TIE) and LibTech Insights (LTI) blogs continues to grow steadily. Average total views per week over the last quarter (March to May 2023) average 741 on TIE and 914 on LTI. In mid-May, LTI hosted a free webinar, Inclusive Workplace Practices to Support Mental Health in Higher Education, which attracted 805 registrants and added 135 new email addresses to our webinar list. Our most popular webinar this quarter was ProQuest's "Designing Meaningful Experiences for Digital Natives," at 1,390 registrants. Choice's Authority File and Toward Inclusive Excellence podcasts were shortlists for the Publisher Podcast Awards. The Authority File won the Best B2B Podcast category. This win boosted engagement of both podcasts.

Describe the Most Impactful Unit Activities this Quarter:

Toward Inclusive Excellence (TIE) continues to highlight issues in equity, diversity, and inclusion from across academe. Our most popular posts included The Life and Times of Diamond and Silk, which highlighted the scourge of disinformation campaigns, and the DEIA Resources for Understanding Mental Health, which brought together mental health resources through a diversity framework. In February 2023, our TIE Editor, Alexia Hudson-Ward, spoke with Dr.

Rasul Mowatt and Dr. Davarian Baldwin about the recent attacks on Advance Placement (AP) African American studies curricula and why the fight over teaching Black Studies is a fight for intellectual freedom.

Important Activities and Events Planned Through End of Next Fiscal Quarter:

In Q4 Choice will further explore moving some Choice webinar content to the ALA eLearning site. We will also start sending the subscription vendor RFP document to potential vendors. This summer Choice will begin a series of strategic direction meetings that will focus on consolidating Choice's open access review content into a new content vertical.

COMMUNICATIONS AND MARKETING OFFICE (CMO)

Unit Manager: Payal Patel

# of Staff: Five (5) staff members

Revenue Stream(s) the Unit Supports:

⊠Conference Services ⊠Membership

⊠Continuing Education ⊠Contributed Revenue

Unit Financial Report YTD:

Financial Summary March 31, 2023			
	Actual FY to date	**Budget**	**Variance**
Revenues	$ 2,020	$ -	$ 2,020
Expenses before Overhea	293,440	331,942	38,502
Contribution Margin	(291,420)	(331,942)	40,522
Overhead Allocation	-	-	-
Net Surplus (Deficit)	$ (291,420)	$ (331,942)	$ 40,522

Statement of Division or Unit Financial Performance:

CMO is reporting net at $40,522 better than budget. This is due to lower than budgeted expenses, especially in the area of salary and benefits. Professional services spending is exceeding budget due to contract support until positions including director of the office are filled. Contracts include Audacity Communications (Payal Patel, interim CMO director) and Mekky Media Relations, a firm hired in January for its expertise in media relations and marketing.

Statement of Assumptions or Projections for the remainder of the Fiscal Year:

Expenses are expected to continue on the current trend through the end of FY23, with the new CMO director expected to come on board late summer or early in FY24.

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

With the announcement of the 2022 book banning data (March) and Top 10 List (April), CMO received a high volume of media inquiries. President Pelayo-Lozada and OIF Director Deborah Caldwell-Stone continue to act as primary spokespeople on the topic.

Executive Director Hall's inclusion on the TIME100 List was an opportunity to amplify National Library Week, Annual Conference, and the overall mission of ALA in the press, particularly Chicago media.

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

- 66 earned media placements
- 1,411,310,465 earned media impressions
- See below for social media following data

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

- In collaboration with Mekky Media Relations, ALA continues to reach large audiences through top tier national outlets such as The Wall Street Journal, The Guardian and News Nation Now
- Library trade and education focused outlets continue to engage with ALA such as Publishers Weekly, Electric Literature and EdWeek.
- To promote Annual Conference, President Pelayo-Lozada recorded podcasts throughout May which have begun to air and will continue to air throughout June.

Describe the Most Impactful Unit Activities this Quarter:

Honorary Chair Kelly Yang's social media posts and extensive media coverage of the release of ALA's Most Challenged Books of 2022 helped drive a high level of engagement for social media posts during National Library Week.
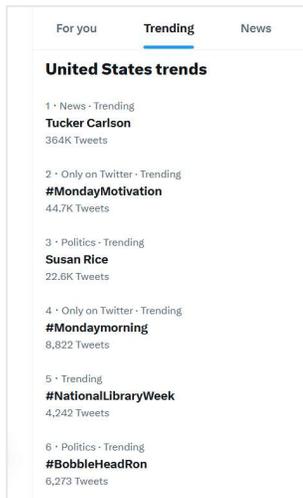
National Library Week posts on ALA and I Love Libraries social channels garnered 914,893 impressions, 46,251 engagements, and 14,133 clicks. The ALA Instagram account gained almost 2,000 new followers, and National Library Week was a trending topic on Twitter Monday morning.

To further capitalize on the release of censorship data and encourage people to sign up for the Unite Against Book Bans campaign, CMO originated Right to Read Day, which will be celebrated on Monday of National Library Week going forward. The initiative was an overwhelming success. 1,774 new advocates signed on to the campaign and social posts on ALA and I Love Libraries channels garnered 291,317 impressions, 17,474 engagements, and 879 clicks.

Social Media Channel	Followers/Fans	Impressions	Engagements	Clicks
ALA Twitter	231,855	3,570,944	61,339	8,131

I Love Libraries Twitter	59,809	138,419	4,025	1004
ALA Facebook	225,386	1,418,592	69,344	6,489
I Love Libraries Facebook	115,542	204,500	9,450	1,818
ALA Instagram	83,122	1,122,962	68,929	N/A
ALA LinkedIn	81,741	600,133	28,092	9,629

Important Activities and Events Planned Through End of Next Fiscal Quarter:

Planning for Library Card Sign-up Month is underway. Leading up to September, CMO will work to introduce and promote a new initiative, called "Back to Libraries," to help drive attendance to libraries, increase library card sign-ups, and encourage the usage of the variety of services and offerings available at libraries.

CONFERENCE SERVICES

Unit Manager: Earla Jones

# of Staff: 8 (2 vacant)

Revenue Stream(s) the Unit Supports:

☒Conference Services

Unit Financial Report YTD:

Financial Summary March 31, 2023			
	Actual FY to date	**Budget**	**Variance**
Revenues	$ 1,163,423	$ 1,778,300	$ (614,877)
Expenses before Overhe	2,176,897	1,757,981	(418,916)
Contribution Margin	(1,013,474)	20,319	(1,033,793)
Overhead Allocation	308,307	471,250	162,943
Net Surplus (Deficit)	$ (1,321,781)	$ (450,931)	$ (870,850)

Statement of Division or Unit Financial Performance:

LibLearnX reported a net expense of $836k for the period ended March 2023, compared to a budgeted net expense of $148k. Registration revenue was at 76% of budget ($591k vs $776k) and exhibit space sales and sponsorships were at 41% of budget ($358k vs $875k) with a total of 89 exhibitors.

Registration revenue through May 30, 2023, was at 94% of budgeted revenue of $2,557,200, compared with 76% of revenue at the same point in 2022, with paid registrants targeted budgeted at 9,230 and a stretch goal per LLX variance

of 11,000. Exhibit space sales were 113% of budgeted revenue of $2,132,500 with a total of 589 exhibitors. Advertising sales were at 77% of budgeted revenue of $240,000.

Statement of Assumptions or Projections for the remainder of the Fiscal Year:

LibLearnX contributed $256k in overhead to the General Fund. Based on the revenue to date for the Annual Conference, the projected overhead contribution to the General Fund is $1.3M.

At the close of this quarter the Conference Services Unit total revenue (LLX and Annual Conference combined) was at 91% of FY23 budget.

Status Report on Pivot Strategy, Aligned Unit Goals:

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

- *Continue cross collaborations with CMO, Publishing, and Membership, leverage addition of Deputy Director with focus on content and attendee engagement*
- *Securing facility, hotel, venue, and vendor contracts that protect ALA in the post-Covid landscape*
- *Evaluate the future scope for the AC, including destinations, size, and components*
- *Evaluate LLX23 outcomes for future beyond 2024-2026*

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

As the Annual Conference has solid programming in place, the primary opportunity and focus is on exceeding financial goals in order to meet overall FY23 budget goals for the unit.

- *Meet financial goal for registration of $184,575 gap created by LLX shortfall, for total of $2,741,775.*
- *Meet financial goal for exhibits of $517,400 gap created by LLX shortfall, for total $2,649,900.*
- *Meet goal of 9,230 (11,000 stretch goal) paid registrants (revenue goal takes precedence over number).*
- *Meet sponsorship and sales of $2,132,500 and advertising goals of $240,000.*

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

Event marketing statistics reveal that March 1 through May 31 and using our list of approximately 74K, we delivered 1,153,180* emails.

There were 367,630 ppl who opened (33.2%) and 9,781 (2.6%) clicked through, resulting in unique Annual Conference website visits.

*30 eblasts

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

Conference Services provided marketing toolkits with social media copy, digital graphics, and talking points to the Exec Board members and ALA President; ALA Staff; Session Presenters; Featured Speakers; Sponsors; and State Chapters.

The following will have received toolkits with an ask to promote to their associates and peers, communicating sessions, conference features, and speakers they are excited to find at the AC.

- *ALA Executive Board*

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

The March 28 Thunderclap generated 170 Twitter and Instagram posts on that specific day. Data revealed there were 156 Tweets Feb. 15-28 and that number increased to 624 Tweets March 1-28.

Describe the Most Impactful Unit Activities this Quarter:

The marketing and promotion strategy to engage ALA members, non-members, library-public, and constituents, continued this quarter, for the upcoming Annual Conference. The AC23 strategy is built on promoting the strong conference programming and highlighting the city of Chicago as ALA's "home."

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

The online Preliminary Program went live March 15, which allowed interested parties (registered and unregistered) to review the overall program/agenda - including President and Chair Programs, Ticketed Events, and Education Programs across a diversity of content areas. The scheduling feature was active April 27 for conference registrants.

Important Activities and Events Planned Through End of Next Fiscal Quarter:

- June – Execution of the 2023 ALA Annual Conference & Exhibition and Digital Experience
- July – Conference Services, in conjunction with the LibLearnX 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 2024 in Baltimore, MD.
- August – Conference Services, in conjunction 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 2024 in San Diego, CA.

CONTINUING EDUCATION (CE)

Unit Manager: Daniel Freeman

# of Staff: 2

Revenue Stream(s) the Unit Supports:

☒ Continuing Education

Unit Financial Report YTD:

Financial Summary March 31, 2023	Actual FY to date	Budget	Variance
Revenues	$ 387,015	$ 403,667	$ (16,652)
Expenses before Overhead	249,042	272,254	23,212
Contribution Margin	137,973	131,413	6,560
Overhead Allocation	102,559	106,972	4,413
Net Surplus (Deficit)	$ 35,414	$ 24,441	$ 10,973

Statement of Division or Unit Financial Performance:

In the months following the data in this report, we received payment for the $100,000 certification with the Massachusetts Library System. Given that, the CE Unit revenue is currently running ahead of budget (108%). Without that purchase—which will likely be redirected to ALA-APA, revenue is at about 90% of YTD budget. ALA-APA will be reimbursing CE for expenses incurred. Expenses are on target per YTD budget.

Statement of Assumptions or Projections for the remainder of the Fiscal Year:

The CE unit projects sales slightly below the monthly budget for the remaining months, with the projection that both expenses and sales close near the original budget target. While the reallocation of $100,000 to ALA-APA may bring us below our goal, the overall revenue brought into the association should be consistent with the budget target. We will see some expense offsets due to one-time grant payments, so expenses are likely to finish ahead of target.

Status Report on Pivot Strategy, Aligned Unit Goals:

The CE unit supported units across the association and continued leading centralization and standardization of CE across ALA while also offering a full schedule of events.

The unit began recording sessions for the new member-exclusive series *ALA Inspire*, which will feature prominent presenters offering insights into important LIS topics and supports the pivot strategy by driving revenue and membership. CE is working with the Membership office to launch this product at the annual conference.

CE generated revenue through new streams via our internal and external partnerships. CE also initiated a discussion with several units within ALA around staffing for efficiency and partnership—the unit is looking to scale up the successful YALSA partnership in a way that will allow division staff to focus on member services while CE focuses on increasing revenue and event volume.

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 continues to develop initiatives in the following areas of opportunity: Partnerships with state library agencies and other large institutions to support library directors and library support staff; collaboration with the membership office to create synergy between membership and eLearning marketing focusing on member-exclusive content as a key benefit; revenue generation from new event formats including a "crash course" series and beginner/intermediate approaches.

There is a strong desire for social-justice and anti-censorship events. Acquisition strategy is modifying accordingly, with more focus on topics like integrating EDISJ into strategic planning, supporting LGBTQIA youth, programming for neurodivergent patrons and more events on AI and its implication for the library world.

 # Of Members/non-members/other stakeholders reached during quarter: Over 25,000 have created accounts on the eLearning site since it launched in November 2021; over 60,000 emailed delivered through marketing.

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

- The CE/YALSA partnership has already led to three eCourses, three paid webinars and one free webinar. In this very early stage, the events have already generated over $18,000 in revenue, already on pace to surpass YALSA's total FY22 CE revenue, despite starting halfway into the fiscal year.
- CE has continued to partner with other units to help offer training on intellectual freedom. The unit helped to facilitate the upcoming webinar *Prepared for Pride Month: A Conversation*, co-sponsored by OIF, FTRF, ALSC and AASL.
- In partnership with the Music Library Association, produced the Music Cataloging Crash Course series.
- Worked with San Jose State University to add several new courses to the partnership, including courses on Information Ethics, Government Documents, Emergency Response and EDISJ.

<u>**Describe the Most Impactful Unit Activities this Quarter:**</u>

- After receiving a $100,00 contract from Massachusetts, CE will be promoting similar agreements with other state agencies, consortia, and large institutions. The CE unit is working with ALA-APA to ensure ALA-APA, legal and financial guidelines are appropriately followed and that ALA-APA's goals are honored.
- Implementing policies recommended by the CFT and adopted by eLearning stakeholders, CE has facilitated several large bulk purchases. To date, these bulk sales have generated a total of nearly $240,000 in revenue that has been shared with other units.
- Began production of ALA Essentials for Library Workers (formerly called Core Competencies for Library Workers), with a plan to launch this license-based program during Q4.

<u>**Important Activities and Events Planned Through End of Next Fiscal Quarter:**</u>

- CE will be adding to the promising crash course series with a programming crash course, and considering crash courses in EDISJ, Customer Service and Library Marketing. We will be repeating the popular crash course series on collection development and reference.
- Launching the first installments of the ALA Inspires member-exclusive series. This series will be our flagship member-exclusive product and will feature well-known industry experts providing presentations designed to show the aspirational potential of their areas of expertise.
- Contracting with instructional designers and subject matter experts to build the new certification program.

CORE

Unit Manager: Julie Reese

# of Staff: 5

Revenue Stream(s) the Unit Supports:

⊠Conference Services ⊠Membership ⊠Publishing

⊠Continuing Education ⊠Contributed Revenue

Unit Financial Report YTD:

Financial Summary March 31, 2023	Actual FY to date	Budget	Variance
Revenues	$ 479,734	$ 559,133	$ (79,400)
Expenses before Overhead	431,016	511,468	80,452
Contribution Margin	48,718	47,665	1,052
Overhead Allocation	43,846	51,416	7,569
Net Surplus (Deficit)	$ 4,871	$ (3,750)	$ 8,622

Statement of Division or Unit Financial Performance:

The lower than budgeted YTD revenue is balanced by the lower than budgeted YTD expense, resulting in a near break-even YTD positive variance of $21. The continued salary savings from 2 open staff positions has resulted in a positive variance in the salary line. The continuing variance in membership revenue, reflective of a declining membership, is the biggest threat to the Core project. The need to increase membership through a laser focus on value is an ongoing priority of member leaders and staff. Revenue from the Continuing Education program is improving.

Statement of Assumptions or Projections for the remainder of the Fiscal Year:

The trend of lower than budgeted revenue and expenses are expected to continue, resulting in a near break-even or slight positive net. Major variances are listed below.

Revenue Variances:
CE = $44,000
Dues = $68,000
Registration Fees = *$77,000
*Incl. $60,000 planned revenue from Leadership Institute that was not held.

Expense Variances:
Payroll = $125,000
Meetings & Conferences = **$39,000
Overhead = $28,000
**Incl. $20,000 planned expenses for Leadership Institute that was not held.

Status Report on Pivot Strategy, Aligned Unit Goals:

Core is focused on implementing the newly approved Core 2022-2025 Strategic Plan that aligns with the Pivot Strategy.

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

In February, the Core Board voted to dissolve the Assessment Section, and redistribute its current responsibilities to existing and future committees. The Core Board also voted to establish a Core section with a readily recognizable focus on preservation. Staff and member leaders have been working this spring to update the web site and get the support structure in place to carry out these initiatives.

Core hired Amber Robbin, our new Core Membership and Marketing Manager.

# of Members (for Divisions): 4,381

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

6 webinars held in March = 375 members and non-members

5 web courses held in March = 80 members and non-members

Interest Group Week held in March = 24 sessions; 7,900 registrations; 2,798 unique registrants; 4,875 live views

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

January, February, and March monthly newsletters = 13,607 messages sent; 4,826 opens (35.5%); 489 clicks (10.1%)

34,498 Twitter impressions

1,953 subscribers to Core e-Forum discussion list

Sent 13 "This Week in Core" updates to the Core Members community in ALA Connect.

Core's President sent nine "Friday Philosophy" updates to the Core Members community in ALA Connect.

Describe the Most Impactful Unit Activities this Quarter:

Library Resources & Technical Services (LRTS) journal became fully open access in January

Interest Group Week: https://www.ala.org/core/continuing-education/interest-group-week

Completed migration to new Informz for all mailings

Opened CFP process for the 2023 Core Forum in October in New Orleans

Held a Core Volunteer Fair in January

Released the 2023 SF Notable Lists

Important Activities and Events Planned Through End of Next Fiscal Quarter:

Preservation Week, April 30 - May 6: https://preservationweek.org/

Annual member survey will launch in May

Core will have a strong presence at ALA Annual Conference 2023:

- 3 In-person preconferences
- 3 Library building tours

- 1 Preservation in Action- Community Service Project
- 30 Educational Sessions (5 sessions are included in the Digital Experience)
- President's Program Featuring Angela Saini
- Core 101
- Core Social

Launch of new Career LIFT Award sponsored by OCLC

DEVELOPMENT OFFICE

Unit Manager: Tracie D. Hall

# of Staff: 3

Revenue Stream(s) the Unit Supports:

☒Membership

☒Contributed Revenue

Unit Financial Report YTD:

Financial Summary March 31, 2023	Actual FY to date	Budget	Variance
Revenues	$ 5,515,000	$ 2,629,083	$ 2,885,917
Expenses before Overhe:	164,122	263,869	99,747
Contribution Margin	5,350,878	2,365,214	2,985,664
Overhead Allocation	-	-	-
Net Surplus (Deficit)	$ 5,350,878	$ 2,365,214	$ 2,985,664

Statement of Division or Unit Financial Performance:

Development has already exceeded its Revenue goal for the year and is currently slightly above projected expenses. Taking into account program activity arising from Annual, we expect to exceed projected programmatic expenses by an approximate $30,000, a minor sum per the revenue generated.

Statement of Assumptions or Projections for the remainder of the Fiscal Year:

Development has initiated a number of new relationships and is optimistic that some will result in support to ALA. However, these relationships often take years to reach fruition and may not result in contributions this fiscal year. In addition, our relationship with current and past funders remains strong and we are optimistic we will receive additional restricted funds to support general operations before September.

Status Report on Pivot Strategy, Aligned Unit Goals:

Development's contribution to the overall Contributed Income Pivot Strategy goal has been met. We continue to employ a strategy that aims to support Pivot Strategy revenue streams other than Contributed Revenue, such as membership, publishing, and continuing education. This strategy has resulted in new positions in those areas, as well as IT support. In addition, we intentionally seek and structure support so that its "tail" supports the Association even after the funds have been spent.

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

Development is proud to observe that ALA is currently implementing many of the funds gained through recent grants and as a result, some key positions are being filled.

Development is pleased to contribute to ALA's efforts to raise funds that support our efforts to combat book bans and censorship.

Development continues to work closely with ALA's Philanthropic Advisory Group to add new members, present informational sessions, host events that celebrate our community, build a dedicated webpage, and promote a culture of philanthropy within ALA.

Development looks forward to launching the search for a new Director of Institutional Advancement in the next several weeks. The search committee has been identified and includes member leaders from the Executive Board, Endowment Trustees, and Philanthropic Advisory Group.

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

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

Through the persistent efforts of leadership, members, and staff, ALA has gained a stellar reputation within the LIS community and the general public. Development applauds the efforts of our community and recognizes the direct positive impact those efforts have on fundraising.

Development's chief means of communicating with members this quarter was around PAG events. In addition, Development sends a thank you note to everyone who makes a donation to ALA.

Describe the Most Impactful Unit Activities this Quarter:

ALA received notice that it would receive $200,000 a year for three years (a total of $600,000) from Acton Family Giving. These funds are unrestricted. In addition, ALA received notice of Pokémon's continued unrestricted support of $125,000 annually. ALA welcomes the support of Danaher Foundation which is supporting an AASL after school program.

ALA wishes to express its enormous appreciation to those who have provided for ALA in their estate planning.

Development wishes to express its great gratitude to Stever Potash, Betty Turock, Christina Rodriquez, and Nancy Davenport for serving on the 150 Anniversary Campaign Advisory Team during the study's development.

Important Activities and Events Planned Through End of Next Fiscal Quarter:

Development will host a number of events at Annual conference.

The first event is a reception to honor our Library Champions. The **Library Champions Reception** will be Thursday evening from 5:30 to 7:00pm in President Lessa Kanani'opua Pelayo-Lozada's suite, the Conrad Hilton Suite, Hilton Chicago. We enthusiastically invite all members of the Executive Board to attend this event.

The second event is our annual **"Treasure Our Treasures" Reception**. This event is an opportunity to express our gratitude to the members of our community who have donated time, talent, and treasure in the past year to ALA. This VIP invite-only reception will be held Friday, June 23 from 1:00 to 2:30pm at Chicago's magnificent Cultural Center. Food and drinks will be served.

The next event is a session presented by PAG co-chair Joyce Garczynski entitled "**Fundraising Inc.: How to Unlock Corporate Support for your Library**" which will be on Sunday, June 25 at 11:00 to 12:00am at McCormick Place, W176ab.

Development plans to finalize a Development calendar soon and will turn to crafting ALA's Annual Report.

See below for Development's analysis of giving during the reporting period.

ALA American Library Association

Donations and Grants, FY 2023 Q1-Q3 - September 1, 2022 - May 31, 2023

Q1-Q3 Giving from Corporations, Foundations, Organizations, Government, and Individuals, Breakdown

Type	Number of Donors	Number of Gifts	Amount	Median	Average
Corporation	130	189	$ 4,458,211	$ 792	$ 23,588
Foundation	30	73	$ 9,595,434	$ 158	$ 131,444
Government Agency	18	36	$ 526,584	$ 5,443	$ 14,627
Non-Profit	28	50	$ 278,360	$ 250	$ 5,567
Individuals	2265	3124	$ 549,908	$ 40	$ 176
	2470	**3472**	**$ 15,408,497**	**$50**	**$ 4,438**
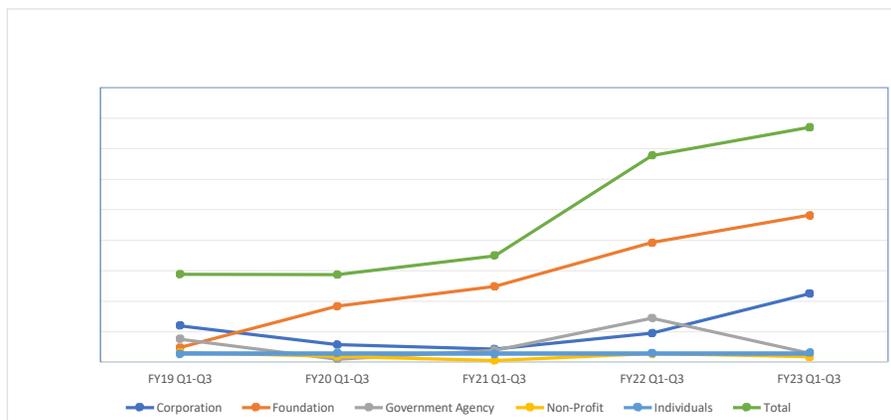
- **Q1-Q3 Comparison of Giving from Corporations, Foundations, Organizations, Government, and Individuals**

Type	FY19 Q1-Q3	FY20 Q1-Q3	FY21 Q1-Q3	FY22 Q1-Q3	FY23 Q1-Q3
Corporation	$ 2,337,157	$ 1,100,325	$ 813,428	$ 1,859,966	$ 4,458,211
Foundation	$ 894,936	$ 3,624,721	$ 4,906,763	$ 7,797,103	$ 9,595,434
Government Agency	$ 1,467,420	$ 135,994	$ 717,479	$ 2,845,864	$ 526,584
Non-Profit	$ 563,253	$ 301,846	$ 34,431	$ 491,298	$ 278,360
Individuals	$ 480,635	$ 542,213	$ 483,442	$ 546,400	$ 549,908
Total	**$ 5,743,401**	**$ 5,705,100**	**$ 6,955,543**	**$ 13,540,631**	**$ 15,408,497**

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	$ 3,120,435	$ 4,458,211
Foundation	$ 1,441,422	$ 4,999,703	$ 5,227,199	$ 8,121,464	$ 9,595,434
Government Agency	$ 1,973,256	$ 764,663	$ 1,027,791	$ 3,421,272	$ 526,584
Non-Profit	$ 745,509	$ 334,114	$ 55,746	$ 515,310	$ 278,360
Individuals	$ 555,644	$ 604,084	$ 569,525	$ 730,495	$ 549,908
	$ 7,281,241	**$ 9,395,037**	**$ 7,994,158**	**$ 15,908,977**	**$ 15,408,497**

Q1-Q3 ALA and Unit Distribution

Overall Distribution: ALA and Units
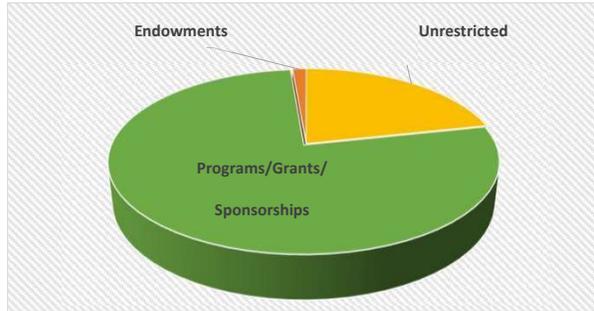
Distribution for ALA: Programs, Endowments and Unrestricted
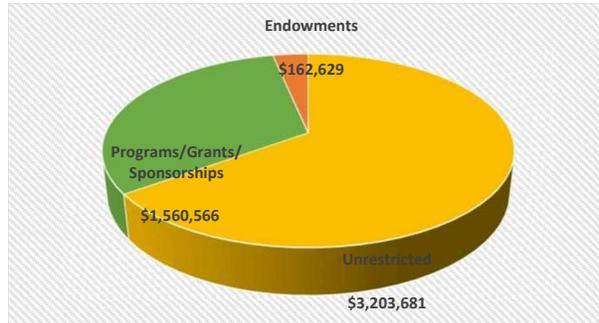
**Distribution for Units: Programs, Endowments and Unrestricted**
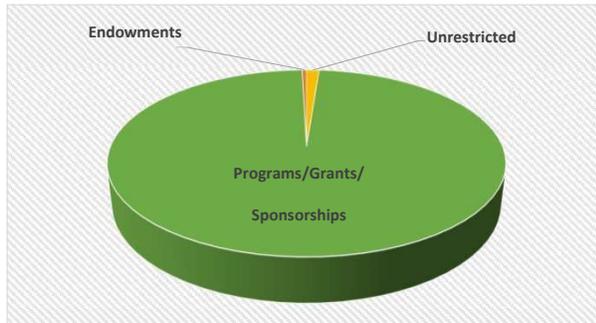
Giving from Corporations, Foundations, Government, Non-Profit, and Individuals By Category

Type	ALA-Unrestricted	ALA-Program/Grants	ALA-Endowments	Units-Unrestricted	Units-Program/Grants	Units-Endowments	Total
Corporation	$ 170,465	$ 357,301	$ 71,075	$ 88,101	$ 3,769,268	$ 2,000	$ 4,458,211
Foundation	$ 2,791,949	$ 1,017,044	$ 4,000	$ 8,536	$ 5,773,906	-	$ 9,595,434
Government Agency	$ 5,963	$ 34,165	$ 17,000	-	$ 469,456	-	$ 526,584
Non-Profit	$ 17,188	$ 7,950	$ 12,500	$ 672	$ 240,050	-	$ 278,360
Individuals	$ 218,115	$ 144,106	$ 58,054	$ 31,006	$ 56,253	$ 42,374	$ 549,908
Total	**$ 3,203,681**	**$ 1,560,566**	**$ 162,629**	**$ 128,315**	**$ 10,308,933**	**$ 44,374**	**$ 15,408,497**
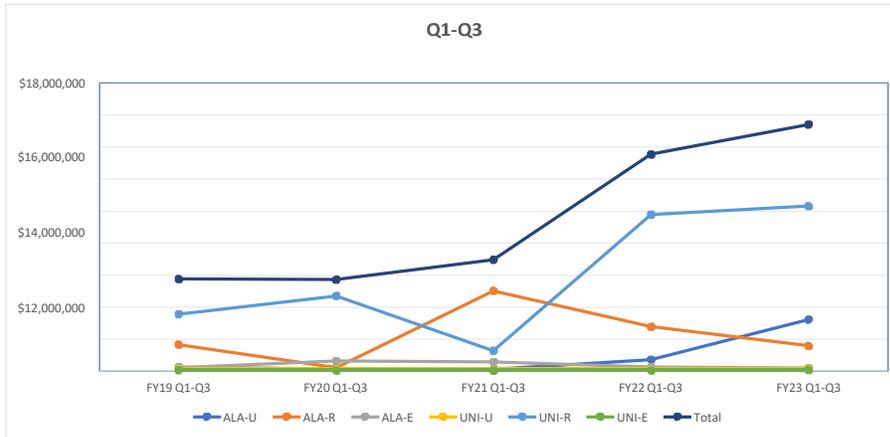
Q1-Q3

Q1-Q3 Comparison of Distribution of Giving by Category

Type	FY19 Q1-Q3	FY20 Q1-Q3	FY21 Q1-Q3	FY22 Q1-Q3	FY23 Q1-Q3
ALA-U	$ 207,947	$ 113,180	$ 85,664	$ 690,194	$ 3,203,681
ALA-R	$ 1,639,677	$ 193,797	$ 5,002,594	$ 2,756,670	$ 1,560,566
ALA-E	$ 199,506	$ 602,143	$ 551,400	$ 224,372	$ 162,629
UNI-U	$ 111,962	$ 103,740	$ 57,895	$ 73,254	$ 128,315
UNI-R	$ 3,543,807	$ 4,681,528	$ 1,251,884	$ 9,778,627	$ 10,308,933
UNI-E	$ 40,500	$ 10,712	$ 6,106	$ 17,514	$ 44,374
Total	$ 5,743,401	$ 5,705,100	$ 6,955,543	$ 13,540,631	$ 15,408,497

FINANCE AND ACCOUNTING

Unit Manager: Dina Tsourdinis

# of Staff: 10 (7 permanent and 3 temporary)

Unit Financial Report YTD:

Financial Summary March 31, 2023			
	Actual FY to date	**Budget**	**Variance**
Revenues			$ -
Expenses before Overhea	1,020,837	1,019,017	(1,820)
Contribution Margin	(1,020,837)	(1,019,017)	(1,820)
Overhead Allocation			-
Net Surplus (Deficit)	$ (1,020,837)	$ (1,019,017)	$ (1,820)

Statement of Division or Unit Financial Performance

The variance in salary-related expenses is due to the accounting department staff transition and payout of vacation accruals.

Statement of Assumptions or Projections for the Remainder of the Fiscal Year

It is projected that the accounting department's expenses will be above budget at year-end due to two senior-level positions being vacant: the Controller and the Accounting Manager. The department is staffed with temporary-to -hire staff at present, while we are evaluating its ideal staffing structure.

Status Report on Pivot Strategy, Aligned Unit Goals

As we are training our new team, there is an ongoing effort to streamline and organize the accounting processes and procedures. There is a continuous improvement effort in identifying areas where procedures need to be strengthened to improve efficiency and internal control.

Unit expenses and deficits are closely monitored and communications with these units and divisions take place to ensure remedial steps are taken before year-end.

Our goal is to fully automate the manual processes into the accounting system modules over the next 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

The transfer of knowledge that occurred over a brief time of staff in transition was proven to be a good start. However, with our complex business model, the new staff has to take longer to research, validate and perform the work.

Necessary changes in process and revamping procedures has created additional work beyond the normal scope, and we are working with IT to prioritize important changes in the systems so that it is not overwhelming for our staff. Our Accounting and Finance departments are enthusiastic and optimistic about our continuous improvement initiatives.

Narrative Description Members/non-members/other stakeholder engagement

The communication and engagement of our Unit Managers and Division EDS have increased with the recent staff transition. We hold regular meetings to ensure that information is shared timely with all stakeholders and that programmatic needs are met.

Describe the Most Impactful Unit Activities this Quarter

The Finance Unit's support to the operating agreement implementation task force continued this quarter. We completed the second iteration of the FY 2024 budget and improved the budget reports.

A complete review of grants accounting procedures has been completed. The accounting for grants needs to be streamlined as a result of our review. Our Auditors agree with our assessment, and we will be working on this improvement after the annual conference.

The new Prophix cloud-based system was updated and we created self-service grant reporting with life-to-date history. This is in line with internal control required procedures over grant and contribution accounting standards.

We are working with IT to upgrade our accounts payable systems. Several planning meetings with the vendor and accounting have taken place to plan our successful implementation. To this end, we invited all Unit Managers to an inclusive information session and sought their input about the new process, which brings changes to the previous methods/systems used. The new system requires vendor management by unit managers and adherence to accurate invoicing protocols to ensure success in the payment process. We distributed templates and information to Unit managers to start the process of vendor management early.

Our preliminary audit planning meeting with PKF Mueller CPAS took place this quarter. The audit will take place in the first week of July.

Important Activities and Events Planned Through End of Next Fiscal Quarter

In collaboration with IT, we will conduct pieces of training on Concur, the new Payables platform.

We will continue to work with ERA, Expense Reduction Analysts, to renew our commercial insurance for Property and Liability and align the policies with our fiscal year-end.

Although we have been reviewing purchasing activities closely and are in the process of centralizing vendor and merchant activities, we will be working on creating a formal procedure for the centralization of the purchasing function, which will result in cost savings for the Association.

The focus of the accounting department will be to learn the fiscal year-end procedures and prepare for closing the fiscal year on 8/31/23. To achieve a successful year-end process, the invoices and transactional activities cutoffs will be communicated with our stakeholders regularly.

The training of new staff and streamlining accounting processes will continue.

GOVERNANCE OFFICE

Unit Manager: Sheryl Reyes

# of Staff: 3

Revenue Stream(s) the Unit Supports:

☒ Membership

☒ Continuing Education

Unit Financial Report YTD:

Financial Summary March 31, 2023	Actual FY to date	Budget	Variance
Revenues	$ -	$ -	$ -
Expenses before Overhe:	111,850	210,858	99,008
Contribution Margin	(111,850)	(210,858)	99,008
Overhead Allocation	-	-	-
Net Surplus (Deficit)	$ (111,850)	$ (210,858)	$ 99,008

Statement of Division or Unit Financial Performance:

ALA Governance Office is performing within budget; there is no negative variance to note.

Statement of Assumptions or Projections for the remainder of the Fiscal Year:

N/A

Status Report on Pivot Strategy, Aligned Unit Goals:

Goals for the Award and Governance cross functional teams are drafted, and work is currently underway.

Governance CFT draft goals:

1. Define and codify the ALA Governance Institute (AGI) by developing a comprehensive leadership development pathway for ALA members to become competent member leaders for the Association to be presented to the AGI faculty & ALA Executive Committee by the end of the FY23 and implemented in FY24.
2. Create a mechanism/pathway for using the staff liaison role to create more consistency and collaboration between the general ALA leadership experience and that of Division and Round Table leadership.

Award CFT draft goals:

1. Increase the awareness, centralize, and simplify the award process for Book & Media Awards by completing a full audit on all ALA Book & Media Awards and Notable lists for all categories and ages to assist Units in the short term and help assess what needs to be addressed in creating an ALA Awards Unit in the long term.
2. Create a working group to include member leaders, staff, and representation across the association to integrate and streamline oversight, responsibility and finances of awards, scholarships and grants that will lead to creation of an ALA Award Unit.

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

- Working with a new election vendor for the 2023 nominations & 2024 elections. The new nominations system is being built and tested with a launch date of July 1, 2023.
- The first ever hybrid Membership Meeting is scheduled to be held during ALA Annual Conference. ALA Governance is working in collaboration with the Membership Office to prepare for this event.
- Working with the Training Orientation Leadership Development (TOLD) Committee to host a "Strategic Leadership Meeting" under the heading of the ALA Governance Institute (AGI). Division/Round Table/Committee Chairs/Presidents are invited to this event.
- Working with staff and member leaders to prepare for the governance meetings and programs during Annual Conference.

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

Election Participation - The certified results account for 7,840 valid ballots from 43,016 eligible members, yielding a participation rate of 18.23%. This is a decrease from the previous year (23.66% participation).

Describe the Most Impactful Unit Activities this Quarter:

- The Office hosted the ALA Executive Board Spring Meeting, which included staff, members, observers, and Division leadership.
- During the month of April/May, board orientation sessions were held for the four incoming Board member leaders.
- Members voted for ALA leadership to serve in the upcoming term in the 2023 ALA Election. To view the results of the ALA 2023 Election, click here.

Important Activities and Events Planned Through End of Next Fiscal Quarter:

- After 30 years of service, one of Governance's key staff is scheduled to retire by the end of the calendar year. Reorganization of the Office will be forthcoming.
- New staff liaison to a recently approved work group by the Board to explore options to enhance the ALA affiliate program.

- New staff liaison to support the new Policy Revision Manual Working Group approved by Council. The group will revise the ALA Policy Manual to include recommended policy insertions from the adoption of the generally revised ALA Bylaws.

HUMAN RESOURCES (HR)

Unit Manager: Lorelle Swader

# of Staff: 4

Revenue Stream(s) the Unit Supports:

☒Conference Services ☒Membership ☒Publishing

☒Continuing Education ☒Contributed Revenue

Unit Financial Report YTD:

Financial Summary March 31, 2023			
	Actual FY to date	**Budget**	**Variance**
Revenues	$ -	$ -	$ -
Expenses before Overhe	500,739	513,450	12,711
Contribution Margin	(500,739)	(513,450)	12,711
Overhead Allocation	-	-	-
Net Surplus (Deficit)	$ (500,739)	$ (513,450)	$ 12,711

Statement of Division or Unit Financial Performance:

HR has realized some salary savings due to a vacant position and the use of temporary employees.

Statement of Assumptions or Projections for the remainder of the Fiscal Year:

The HR Assistant position will be filled before the end of the fiscal year, so we anticipate ending the year close to budget.

Status Report on Pivot Strategy, Aligned Unit Goals:

HR is working to fill several open positions as well as continuing to put into place an ALA 101 Onboarding program designed by the Staffing Synergies & Alignment cross functional team.

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

We have been actively working to support the hybrid work environment for staff with the newly implemented in-office schedule changes since returning in January. Additionally, we are adjusting to the post-pandemic protocols relaxed after COVID-19.

# of Members/non-members/other stakeholders reached during quarter (for all Units): Approximately 250.

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

As the unit who recruits and does hiring for the association, HR touches every unit in some capacity.

Important Activities and Events Planned Through End of Next Fiscal Quarter:

HR has several open searches that we are hiring for and anticipate closing them out.

INFORMATION TECHNOLOGY (IT)

Unit Manager: Rebecca Headrick, Chief Information Technology Officer
# of Staff: 8

Revenue Stream(s) the Unit Supports:

⊠Conference Services ⊠Membership ⊠Publishing

⊠Continuing Education ⊠Contributed Revenue

Unit Financial Report YTD (through March 31, 2023):

Financial Summary March 31, 2023			
	Actual FY to date	**Budget**	**Variance**
Revenues	$ -	$ -	$ -
Expenses before Overhe	1,942,268	2,086,019	143,751
Contribution Margin	(1,942,268)	(2,086,019)	143,751
Overhead Allocation	-	-	-
Net Surplus (Deficit)	$ (1,942,268)	$ (2,086,019)	$ 143,751

Statement of Division or Unit Financial Performance:

Invoice timing for professional services and the ALA.org Website Update Project hosting move will close this positive variance in the remaining months of FY23. We expect all remaining FY23 expenses to fall within budgeted amounts.

Status Report on Pivot Strategy, Aligned Unit Goals:

The IT unit is foundational to uplifting ALA's Pivot Strategy, supporting, and improving multiple aspects of ALA operations while continuously ensuring the security of infrastructure and data services to support all activities. In addition, we are focused on broad organizational impact efforts, such as redesigning the ALA website, developing an analytics and business intelligence platform for full organizational use, and implementing operational improvements to increase efficiency across all areas.

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

Major projects underway continue to have significant organization-wide impacts. For example, the ALA Analytics platform is nearing launch readiness to show internal and external business intelligence that informs data-driven decision-making. In addition, the ALA website project has seen the completion of wireframes, which will be used to

create design comps (or "design comprehensives"). Design comps are the final design phase deliverables that produce the closest draft to the final product before we move to the next phase of the update project.

Information gathering of payment processes, communications and software inventories, infrastructure documentation, and more continue to help define ALA IT services' current state and scope. These simultaneous efforts aim to identify gaps to support the development of an updated technology strategy that removes redundancies, improves service delivery, and prioritizes change management efforts that support consolidation, automation, and more to reduce cost and maintenance requirements and continuously leverage IT as a strategic partner in support of the ALA mission.

Describe the Most Impactful Unit Activities this Quarter:

One crucial example of an updated technology strategy includes using refreshed documentation to investigate options for a new managed services engagement to support ALA IT Infrastructure. With the assistance of Expense Reduction Analysts (ERA), we have developed a request for proposal from managed service providers (MSPs) able to partner with the IT team in supporting existing ALA technology infrastructure and joining ALA as a trusted partner to advance our technology strategy toward a modernized public-cloud structure and enhanced security practice.

Another significant effort launched this quarter includes our project to move to a new Accounts Payable platform in SAP Concur Invoice. In close coordination with ALA Finance & Accounting, we have acquired the necessary licenses and enabled the platform, workflow configuration has begun, and the first of multiple informational and training sessions has been completed with Unit Managers.

Important Activities and Events Planned Through End of Next Fiscal Quarter:

The user experience evaluation phase of the website update project will see guided user testing to ensure that it is easy to use and meets their needs. Efforts and outcomes will include:
- Usability testing (with surveys): To see how users interact with the design, layout, content, and navigation and gain feedback on their experience
- Identify any usability issues, such as finding content or using the new proposed navigational structure.

The first iteration of the ALA Analytics platform will be launched to ALA Staff and will include multiple training opportunities. In addition, we will form a staff Data Governance team responsible for developing and implementing policies and procedures for the platform's usage, establishing data quality standards, defining data management responsibilities, and more to promote and encourage the adoption of a data-driven mindset across all programs and practices within ALA.

The Member Relations & Services team will adopt Zoho Desk for Member Service inquiries by the end of June 2023. We expect the team to be able to deliver improved member service quality and response time by centralizing customer data and automating support tasks with the rich features and functionality Zoho Desk affords. In addition, we plan to enable the web-based Chat feature for direct online service by the end of August 2023.

The move of ALA-Choice.org mail accounts into the ALA.org Office 365 context will be complete by Friday, June 16, 2023. We will move the ALAWash.org context into the ALA.org domain by August 2023. Advantages will include the enhanced ability to collaborate across all divisions and units in real-time, enabling us to centralize and improve our document and knowledge management practice.

Finally, the IT Team will continue to lead Project Management for the A/P system transition to Concur Invoice. The next quarter will include continued collaboration with the Finance and Accounting team to set up integrations to the Great Plains financial system, payment processors, and automatic workflow configurations. We will conduct thorough testing and provide staff training in August 2023 before we go live on the first business day of FY24, Friday, 9/1/2023. This notable change in A/P processing will impact all ALA Divisions, Units, and Offices by creating a more streamlined, efficient, and effective process for all ALA payments.

INTERNATIONAL RELATIONS OFFICE (IRO)

Unit Manager: Michael Dowling

# of Staff: 1.5

Revenue Stream(s) the Unit Supports:

☒Conference Services ☒Membership ☐Publishing

☒Continuing Education ☒Contributed Revenue

Unit Financial Report YTD:

Financial Summary March 31, 2023	Actual FY to date	Budget	Variance
Revenues	$ 507	$ 56,750	$ (56,243)
Expenses before Overhe:	158,194	148,430	(9,764)
Contribution Margin	(157,687)	(91,680)	(66,007)
Overhead Allocation	-	-	-
Net Surplus (Deficit)	$ (157,687)	$ (91,680)	$ (66,007)

Statement of Division or Unit Financial Performance:

Delay in payments or revenue from the Sharjah International Library Conference of $41,000. Should be accrued in April. Total expenses are above budget as salary expenses are running higher than budgeted.

Statement of Assumptions or Projections for the remainder of the Fiscal Year:

With shortfall in anticipated revenue from Sharjah Conference will end around $16,000 less than budgeted. Expenses are expected to end $2,500-$3,500 over budget.

Status Report on Pivot Strategy, Aligned Unit Goals:

Three hundred-eighteen (318) librarians from fifty countries have registered for Annual so far. Forty-nine exhibitors from eleven countries, ten more than last year. International membership continued its upward trend with sixteen previous members re-instating through collaborative outreach between Membership and IRO. Completed six-part

webinar series on Media Literacy with librarians in Kazakhstan. At least two hundred fifty librarians attended each webinar.

IFLA: Past-President Julius C. Jefferson Jr. was not elected for Chair of Regional Division Council. Past-President Loida Garcia-Febo is Chair of the Management of Library Associations Section becoming a member of the IFLA Governing Board. Twenty-one of twenty-two nominees were elected.

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

Working with the IRC geographic subcommittees, IRO has created new regional global groups in ALA Connect to increase engagement. Members from the various regions and those interested in libraries in those regions will share knowledge, experiences, and work to develop partnerships.

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

400+ librarians from Kazakhstan participated in three Media Literacy webinars

125 members and non-members participated in "Changes and Challenges in Libraries in Latin America" webinar moderated by Past ALA President Carol Brey in May

4,000- international librarians in communications on Annual Conference

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

Two international promotions have started to bring back members and add new members. Sixteen previous members re-instating through collaborative outreach between Membership and IRO in April and May. Promotion to recruit student members (IRO, CRO, Membership) in Canada has already added a dozen new members.

Describe the Most Impactful Unit Activities this Quarter:

IRO was able to get at least one of two ALA past-presidents on the IFLA Governing Board. Overall success rate of getting others on to IFLA committees. The new promotions are starting to add international members. The success of the Kazakhstan webinar series provides opportunities to propose similar trainings for funding to State Department, etc.

Important Activities and Events Planned Through End of Next Fiscal Quarter:

There will be twelve international programs taking place at Annual Conference and thirty international poster sessions. Two programs will focus on Ukraine.

The IFLA Congress will be held in Rotterdam at the end of August, providing opportunities for engagement, membership, and customer recruitment.

Planning for the 10th Sharjah International Library Conference in November will continue.

MEMBER RELATIONS & SERVICES (MRS)

Unit Manager: Melissa Walling

# of Staff: 9.5

Revenue Stream(s) the Unit Supports:

☒ Membership

☒ Continuing Education

Unit Financial Report YTD:

ALA Membership Dues:

Financial Summary March 31, 2023			
	Actual FY to date	**Budget**	**Variance**
Revenues	$ 2,737,494	$ 2,835,525	$ (98,031)
Expenses before Overhead	74,181	61,250	(12,931)
Contribution Margin	2,663,314	2,774,275	(110,961)
Overhead Allocation	-	-	-
Net Surplus (Deficit)	$ 2,663,314	$ 2,774,275	$ (110,961)

MRS Office Budget:

Financial Summary March 31, 2023			
	Actual FY to date	**Budget**	**Variance**
Revenues	$ 30,980	$ 24,500	$ 6,480
Expenses before Overhead	435,927	471,270	35,343
Contribution Margin	(404,947)	(446,770)	41,823
Overhead Allocation	-	-	-
Net Surplus (Deficit)	$ (404,947)	$ (446,770)	$ 41,823

Statement of Division or Unit Financial Performance:

For FY 2023, ALA budgeted a 4% increase over FY 2022 as we continue to work through challenges to rebound to pre-pandemic levels. Through March 2023, member dues lagged behind budget but remain ahead of last year.

Total ALA membership count at the end of March 2023 was 50,391, comparable to the count of 49,705 at the end of FY

2022. With 2/3 of ALA members paying dues from their own pocket, ALA dues revenue is sensitive to economic conditions including decades high inflation rates.

ALA remains focused on embedding a sense of stewardship in members to promote and encourage ALA involvement and support.

Statement of Assumptions or Projections for the remainder of the Fiscal Year:

The ALA membership dues revenue will continue to trend behind budget by about 3% and the MRS office budget will end the year close to budget or with a favorable variance.

Status Report on Pivot Strategy, Aligned Unit Goals:

Our membership strategy is focused on rebounding our membership counts and recruiting new members. We execute initiatives such as executing ongoing quarterly campaigns to recapture lapsed members by promoting ALA mission impact and professional development opportunities, and automating a campaign to non-members who register for events on the Learning Management System.

The membership office also supports revenue generation for the organization beyond ALA membership. This includes collecting division and round table dues revenue, support for subscription sales, registration for small face-to-face events and eLearning students. This all contributes to the pivot strategy.

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

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 also launched a new web page for Students: https://www.ala.org/membership/student-member-center

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 also appreciate President Pelayo-Lozada for hosting a Student Reception in the presidential suite during ALA Annual Conference.

We are also working with our Canadian LIS programs to offer discounted ALA Student Membership since joint student membership is not available in Canada.

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

All 50,000+ members, lapsed members, select non-member groups

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

The ALA Connect Community ecosystem continues to grow. We have **1743** communities of which **1045** are **Committees** that utilize ALA Connect to do the work of the association.

We monitor ratios and key metrics (**Email Open Rates**, and the **Average Replies/Threads Ratio**) that we use to indicate the value of ALA Connect to members. Our **Average Replies/Threads Ratio** in all communities and in the ALA Members Community is **.72**. The email open rate continues its upward trend, hitting a peak of **46%** last quarter and is now **45%.** Our unique login percentage is **48%**.

ACRL Conference: The membership team hosted a booth with high engagement and great discussion.

Describe the Most Impactful Unit Activities this Quarter:

ALA Membership Model: ALA partners, Avenue M, are doing limited market interviews on the new model. This will inform the final phase of financial modeling and recommendations to help guide the complex decisions on the pricing and bundling opportunities with the membership model. These final recommendations will be built upon the findings of the membership landscape survey.

Membership Recruitment: The membership recruitment effort focusing on non-members is underway with varying results. A pilot campaign offering a 15% discount on ALA membership produced a disappointing conversion rate. Alternately, the first truly automated marketing campaign targeting those who have taken an eLearning course is generating positive membership results during the first three months.

Important Activities and Events Planned Through End of Next Fiscal Quarter:

Customer Service: We will launch ZohoDesk this quarter. This tool will assist in tracking and streamlining our email operations and ensure consistent responses to frequently asked questions. We will also pilot live chat this summer.

ALA Annual Conference: In addition to the usual ALA Lounge, the membership office is also coordinating a membership education program – ALA Membership 101 to introduce new members to engagement opportunities and resources. This could also serve as a refresher for current members. This will be a pilot program and will leverage the success some of our divisions have had with similar programs.

OFFICE FOR ACCREDITATION

Unit Manager: Karen O'Brien

# of Staff: 2

Revenue Stream(s) the Unit Supports:

☒Membership

Unit Financial Report YTD:

Financial Summary March 31, 2023	Actual FY to date	Budget	Variance
Revenues	$ 86,103	$ 86,716	$ (613)
Expenses before Overhead	157,936	125,563	(32,373)
Contribution Margin	(71,833)	(38,847)	(32,986)
Overhead Allocation	-	-	-
Net Surplus (Deficit)	$ (71,833)	$ (38,847)	$ (32,986)

Statement of Division or Unit Financial Performance:

Met face-to-face instead of virtually in the fall to better orient new Committee members.

Statement of Assumptions or Projections for the remainder of the Fiscal Year

Curtailing expenses to neutralize the –$30, 553 in meeting expenses.

Status Report on Pivot Strategy, Aligned Unit Goals

Ensure quality and accessibility of ALA-accredited degree programs

- Quality and choice of programs increasing with 68 accredited programs; two Pre-candidates and one Candidate in process.
- Trended metrics on diversity, faculty/student ratios etc., available publicly at [Excel]
- Revised Standards proposal to ALA Council for adoption on Monday at the 2023 Annual Conference. Revised Standards reflect: the state of the expanding field, ALA's core values, and the urgency to broaden equity, diversity, and inclusion in LIS education and libraries. https://www.ala.org/aboutala/revision-2015-ala-standards-accreditation-master%E2%80%99s-programs-library-and-information-studies

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

Updating process documentation and training to follow the ALA Council's decision on adoption of the Standards revision.

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

Approximately 850

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

Spring review visits engaged an estimated 500 stakeholder ALA reviewer volunteer leaders and LIS program personnel.

Describe the Most Impactful Unit Activities this Quarter:

Comprehensive program reviews and gathering of feedback on Standards revision. Placed a program on Conditional status with a visit in Spring 2025

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

- Reviewer training Thursday afternoon at ALA Annual Conference (AC) 3:00-5:00 PM Boulevard AB room at the Chicago Hilton
- CoA meetings at Annual Conference (AC) to close comprehensive reviews and respond to special reports (in person & virtual visitors
- CoA open forum at AC on proposed Standards revision: Sat, 5:30-7:00 PM Astoria Room, Chicago Hilton

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

Unit Manager: Kevin D. Strowder

# of Staff: 2 FT and 1 Temp

Revenue Stream(s) the Unit Supports:

⊠Conference Services ⊠Membership

☒Continuing Education ☒Contributed Revenue

Unit Financial Report YTD:

Financial Summary March 31, 2023	Actual FY to date	Budget	Variance	
Revenues	$ 3,375	$ 9,250	$ (5,875)	
Expenses before Overhea	143,458	176,109	32,651	
Contribution Margin	(140,083)	(166,859)	26,776	
Overhead Allocation	-	-	-	
Net Surplus (Deficit)	$ (140,083)	$ (166,859)	$ 26,776	

Statement of Division or Unit Financial Performance:

N/A or understood to be greater than the $25,000 threshold.

Statement of Assumptions or Projections for the remainder of the Fiscal Year:

Due to the departure of key ODLOS staff, the anticipated revenue (typically brought in by Continuing Education Training) will not be met as capacity remains tight. So, there will likely be another $1,500-$2,000 to enter our revenue lines because of previous work. However, the staff shortages have allowed for the overall budget to be offset in a positive variance due to this same issue.

Status Report on Pivot Strategy, Aligned Unit Goals:

ODLOS remains most dedicated to centering Continuing Education as the leading unit goal and mission-driven work of the office. This is sustained through elevating member initiatives and projects. In the past few months, we have hosted multiple strategy conversations with Committees, Round Tables, and Interest Groups to rethink their charge to include more discussions about education as a means to unit or group revenue.

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

A pain point for the office remains our capacity to sustain some of the key work within the office. There are a ton of ideas brewing to support the Literary work and we are now in a place to add resources and capacity to the efforts. Recent strategy meetings help to clarify needs and identify opportunities for members to share more expertise in a long-term plan for project execution. However, we remain in alignment with delivering resources in our archive and encouraging partnerships to fill gaps in the interim.

# of Members/non-members/other stakeholders reached during quarter (for all Units): 4,685

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

Accessibility practices has been a leading effort within the office as we approach the ALA Annual Conference. The Program Manager and external stakeholders have been working to refine our strategy and developed a communication

pipeline for internal staff to offer suggestions and receive feedback on their work. The hope is to share a draft of the road map for approval during LLX 2024.

Also, the ODLOS team has been navigating many member growth areas and opportunities. Most have been centered around interpersonal relationships with each other, the integrity of ALA and its ability to support major projects, ensuring Round Table leaders have more autonomy with their financial plans and budgets, and continued staffing shifts.

Describe the Most Impactful Unit Activities this Quarter:

We are excited to have selected 70 Scholars this year for the Spectrum Scholarship Program. All applicants awarded are in the process of being notified. Also, we are celebrating 25 years of the program's existence at ALA Annual this year. We are bringing the founders to join in conversation with ALA President-Elect to discuss the history and impact over the profession.

Important Activities and Events Planned Through End of Next Fiscal Quarter:

The Rainbow Round Table is celebrating (after a three-year delay) their 50th Anniversary Gala this summer. It will bring 250 people together during Pride Month at the MCA.

The Committee on Diversity, in partnership with ODLOS, will present the final draft **of the 2023 Edition of the *American Library Association Standards for Library Services for the Incarcerated and Detained*** to the ALA Council. This 2-year project captures an elevated lens when it comes to supporting this community.

ODLOS is working with CE to build an ALA Essentials course on working with Diverse Library Communities and an e-course around Anti-Racism.

OFFICE FOR HUMAN RESOURCE DEVELOPMENT AND RECRUITMENT (HRDR)

Unit Manager: Lorelle Swader

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

Revenue Stream(s) the Unit Supports:

⊠Conference Services ⊠Membership

⊠Continuing Education ⊠Contributed Revenue

Unit Financial Report YTD:

Financial Summary March 31, 2023			
	Actual FY to date	**Budget**	**Variance**
Revenues	$ 922	$ 32,083	$ (31,161)
Expenses before Overhe	131,353	128,056	(3,297)
Contribution Margin	(130,431)	(95,973)	(34,458)
Overhead Allocation	-	-	-
Net Surplus (Deficit)	$ (130,431)	$ (95,973)	$ (34,458)

Statement of Division or Unit Financial Performance:

Revenue for the JobLIST Placement Center is down due to not having a presence at LLX.

Statement of Assumptions or Projections for the remainder of the Fiscal Year:

The JobLIST Placement Center is the only source of revenue for HRDR and will be down due to not having a face-to-face center for LLX. Additionally, unanticipated expenses for staff travel and material shipments to LLX.

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 (1301)

# of Members/non-members/other stakeholders reached during quarter (for all Units): Approximately 750 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 Committee on Education (COE) had a webinar on May 17, 2023, 12:00 – 1:00 p.m. This session discussed changes that were made to the Core Competencies for the generalist librarian that was approved by Council during LLX.   They

also discussed ways that these newly revised competences can be used by different stakeholders -- employers, LIS faculty members, students, and emerging professionals. Almost 250 people registered for and attended the event.

Important Activities and Events Planned Through End of Next Fiscal Quarter:

There will be a face-to-face JobLIST Placement Center in Chicago during Annual Conference.   Also, the Emerging Leaders Program will have a conference wide poster session. The New Members Round Table (NMRT) is hosting an all-conference Orientation.

OFFICE FOR INTELLECTUAL FREEDOM (OIF)

Unit Manager: Deborah Caldwell-Stone

# of Staff: 4.6 FTE, active search for Deputy Director

Revenue Stream(s) the Unit Supports:

⊠Membership ⊠Publishing

⊠Continuing Education ⊠Contributed Revenue

Unit Financial Report YTD:

Financial Summary March 31, 2023	Actual FY to date	Budget	Variance
Revenues	$ 1,116,678	$ 26,375	$ 1,090,303
Expenses before Overhead	256,442	215,092	(41,350)
Contribution Margin	860,236	(188,717)	1,048,953
Overhead Allocation	-	-	-
Net Surplus (Deficit)	$ 860,236	$ (188,717)	$ 1,048,953

Statement of Division or Unit Financial Performance:

Performance data as recorded in the March 31, 2023 Performance Report.

The significant variance in revenues represents grant funding and donated revenues in support of OIF initiatives and staffing.

Statement of Assumptions or Projections for the remainder of the Fiscal Year:

We anticipate continued contributed revenues in support of Unite Against Book Bans and general OIF initiatives, as well as revenue resulting from the launch of 2023 Banned Books Week merchandise sales and continuing education offerings. We project costs in excess of the budget for professional services, representing payments to consultants supporting OIF initiatives.

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, such as National Library Week's Right to Read Day, continuing education initiatives, and policy and advocacy initiatives in partnership with other ALA units. 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.

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

Since January, OIF has received 407 challenge reports, 333 of which targeted books and graphic novels comprising 1,448 unique titles; the balance of challenges were to displays, programming, and policies. In addition, OIF and PPA tracked 147 instances of adverse state legislation.

The Office for Intellectual Freedom is working with Public Policy and Advocacy, Chapter Relations, and CMO to address organized campaigns by political advocacy groups demanding the censorship of books in school and public libraries. These activities included working cooperatively with Policy Corps members on the Unite Against Book Bans campaign, responding to press inquiries, and assisting state affiliates advocating against adverse legislation.

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

In the last quarter, OIF staff and volunteers presented 26 programs, 13 of which were in person at meetings in the United States and Canada, with attendance of 100 or more at each event. Meetings included the Quebec Public Library Association, the Texas Library Association, the New Mexico Library Association, the Rhode Island Library Association, and library trainings in Vermont and New Jersey.

Between March 1 – May 31 OIF received 333 challenge reports, with 104 library workers, educators, and library supporters requesting and receiving support. OIF staff proactively provided support to 14 other library workers, while responding to an additional 30 requests for support for proposed policy changes or to proactively prepare for challenges.

Through Unite Against Book Bans, we released three calls to action using the UABB and PPA mailing lists in New Hampshire, Louisiana, and Texas. The initial Louisiana blast generated more than 200 letters to legislators and the blast in Llano, Texas drew hundreds to a county board meeting that aimed to shut down the public library system, resulting in a board decision to keep the library open.

Describe the Most Impactful Unit Activities this Quarter:

During National Library Week, Unite Against Book Bans and ALA inaugurated **Right to Read Day**, with several accessible calls to action aimed at engagement with local libraries. #RighttoReadDay trended on Twitter and nearly 1,800 individuals joined the Unite Against Book Bans campaign, with many making donations to the campaign and ALA's intellectual freedom work.

*I*n addition, OIF **released its 2022 Banned and Challenged Book Data** as part of the State of America's Library Report, which resulted in coverage of the threat to libraries, librarians, and the freedom to read by major media outlets.

Important Activities and Events Planned Through End of Next Fiscal Quarter:

Rally for the Right to Read: Uniting for Libraries & Intellectual Freedom, to be held at the Chicago Hilton on Thursday, June 22, 2023 at 6:00 pm as part of the 2023 ALA Annual Conference. The program will feature anti-censorship activists from around the nation, the 2023 recipients of ALA intellectual freedom awards and internationally renowned author and scholar Dr. Ibram X. Kendi. The Rally for the Right to Read will recognize the 2023 recipients of the FTRF Roll of

Honor Award, the Eli M. Oboler Award, the John Phillip Immroth Award, and the Gerald Hodges Intellectual Freedom Chapter Relations Award.

Promotion of the **2023 Banned Book Week theme**, "Let Freedom Read," designed by the firm Landor & Fitch, through the release of merchandise in the ALA Store and social media.

PUBLIC LIBRARY ASSOCIATION (PLA)

Unit Manager: Mary Davis Fournier

# of Staff: 12.5

Revenue Stream(s) the Unit Supports:

⊠Conference Services ⊠Membership ⊠Publishing

⊠Continuing Education ⊠Contributed Revenue

Unit Financial Report YTD:

Financial Summary March 31, 2023	Actual FY to date	Budget	Variance
Revenues	$ 485,529	$ 467,436	$ 18,093
Expenses before Overhe	625,817	727,837	102,019
Contribution Margin	(140,288)	(260,401)	120,112
Overhead Allocation	16,969	19,413	2,444
Net Surplus (Deficit)	$ (157,257)	$ (279,814)	$ 122,557

Statement of Division or Unit Financial Performance:

PLA ends March in a strong position, on track to meet or realize a lower deficit than planned for the non-conference year budget by year end. Variances include:

- Although down overall, PLA membership dues performed 13% above budget during this reporting period. This result is likely due to renewals timing during a non-conference year. PLA has been pursuing a renewal/engagement campaign to further support non-conference year renewals.
- PLA subscriptions are behind budget due to lagging Benchmark data platform sales. PLA is currently evaluating marketing strategies for this start up product.
- Salaries/Benefits are behind budget due to vacancies.
- Publications related expenses are slightly higher than budgeted due to timing of *Public Libraires* invoices and higher than budgeted Web CE fees (offset by revenue).

Statement of Assumptions or Projections for the remainder of the Fiscal Year:

PLA is on track to meet or exceed its non-conference year planned deficit budget (-$279,824). It is anticipated that Web CE and publication advertising sales will remain strong. Salaries/Benefits may end over budget, depending on timing for posting of vacant positions and duration of temporary contracts.

Status Report on Pivot Strategy, Aligned Unit Goals:

PLA supports significant revenue in each area of the pivot strategy, as well as in the nascent data/research stream. PLA observes a two-year budget cycle fueled by our biannual National Conference. Although FY23 is a non-conference year for PLA, our division is in heavy planning mode. PLA also contributes to the ALA Annual Conference with 23 programs and two half-day outcome measurement preconferences. Web CE, publishing, and membership are embedded within ALA systems and performance aligns with the overall association trend; contributed revenue is very strong, supporting significant PLA programmatic initiatives and related staff.

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 challenges and related safety and security issues continue to be the dominant issues in public libraries. To meet member needs, PLA is hosting a Legal Issues Forum and Security in Today's Libraries discussion section at Annual. PLA and PPA continue to work closely on issues related to advocacy, policy, and communications to support more systems level activity favorable to libraries.

PLA membership is down nearly 900 members since the start of the fiscal year, which follows the typical loss we see in a non-conference year. Staff are ahead of schedule in planning for the launch of PLA 2024 Conference and will use this opportunity to increase membership in the fall.

# of Members (for Divisions): 7,437 per the last audited membership report

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

Audience	Numbers
PLA members (April 2023)	7,437
Average email audience	16,959
Total reached via social media	232,839 impressions; 5,352 engagements
Average Public Libraries Online visitors	43,000
Average podcast listeners	18,000
2022 survey participants	1,167
PL magazine subscribers	396
Total webinar registrants (March-May 2023)	1,638

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

Web CE continues to be a strong revenue stream for PLA. In April and May, PLA held three paid, one free, and one sponsored webinar. 1,638 registrants generated $19,430 in revenue.

PLA is offering two paid pre-conferences at ALA Annual. Registration has lagged, continuing a year-long trend of smaller pre-conference attendance. PLA is considering pre-conference ROI as it plans for PLA 2024.

PLA has also revised its online newsletter, moving to an every-other-week distribution, which doubles touchpoints with our members and the amount of content we are able to promote.

Describe the Most Impactful Unit Activities this Quarter:

Over the spring:

- PLA secured additional funding from AT&T to expand DigitalLearn content and adoption incentives from libraries;
- A how-to module for ACP application was added to DigitalLearn;
- Over 560 proposals were received for PLA Conference sessions;
- PLA is sponsoring 28 Conference programs, and 2 preconference during Annual;
- PLA is working with a sales rep to generate income through webinar sponsorships and ad sales, yielding $28,107 in revenue over the last three months.
- PLA hosted its first candidate town hall during the ALA election season and completed all 2024 committee appointments by June 1.

Important Activities and Events Planned Through End of Next Fiscal Quarter:

In the coming months:

- PLA will welcome three new board members: Michael Lamber, President Elect, Tamara King, and Veronda Pitchford, Directors-at-Large, and Deb Sica, Division Councilor;
- The PLA Conference Program Subcommittee will select conference content;
- PLA will host 3 paid webinars and the PLA CE Advisory Committee will select the next 6 months of webinar content;
- 265 libraries will receive incentive funding to host DigitalLearn trainings with support from AT&T;
- SuperSearchers information literacy training will launch, with support from Google;
- PLA will host orientation for new board members and committee chairs.

PUBLIC POLICY AND ADVOCACY (PPA)

Unit Manager: Alan Inouye

# of Staff: 14.5 (this report does not include CRO and IRO)

Revenue Stream(s) the Unit Supports:

☒Conference Services ☒Membership ☐Publishing

☒Contributed Revenue

Unit Financial Report YTD:

Financial Summary March 31, 2023	Actual FY to date	Budget	Variance
Revenues	$ -	$ -	$ -
Expenses before Overhead	1,623,245	1,530,672	(92,573)
Contribution Margin	(1,623,245)	(1,530,672)	(92,573)
Overhead Allocation	-	-	-
Net Surplus (Deficit)	$ (1,623,245)	$ (1,530,672)	$ (92,573)

Statement of Division or Unit Financial Performance:

PPA's 4 major events—Congressional Fly-in, Two Policy Corps workshops, and COL Retreat—all took place already, but were budgeted through the forthcoming months. Also, professional/lobbying services are higher than budgeted because of backfilling because of staff vacancies. Expect deficit to decline significantly in the coming months, approaching on-budget at the close of the fiscal year.

Status Report on Pivot Strategy, Aligned Unit Goals:

- Increased coordination/collaboration with offices and divisions to promote advocacy
    - OIF and CMO – collaborate extensively on Unite Against Book Bans campaign, focusing on state/local advocacy as well as the national campaign and National Library Week events, including the first ever National Right to Read Day
    - All ALA divisions – Submitted advocacy and initiative content for social media, blogs, and other digital comms to divisions, PPA staff spoke at ALA all-staff meeting about National Library Week accomplishments
- 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:
    - Prison Libraries Act: worked closely with Rep. Emanuel Cleaver's office to shape bill and gain initial support for libraries in the most marginalized communities in the nation.
    - #FundLibraries campaign: Mobilized grassroots to seek congressional signatures on "Dear Appropriator" letters in support of IMLS and the Dept. of Ed.'s Innovative Approaches to Literacy
    - Submitted comments and reply comments to support streamlining and simplifying proposed rules for the federal E-rate for Tribal libraries
    - Reviewed and commented on NTIA's guidance to state leaders on engaging libraries in state Digital Equity Act planning activities
    - Filed comments with the NTIA about the Digital Equity Act of 2021, highlighting promising models of advancing digital equity in libraries across the country, and advocating for the inclusion of libraries in competitive grant programs and state digital equity plans

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

- Library funding: despite the shorter window to gather signatures for Dear Appropriator letters in support of LSTA and IAL, we met the number of last year's signatures. The debt ceiling agreement adversely impacts federal appropriations advocacy for FY24 and future fiscal years.

- Access to information (Unite Against Book Bans): Working with OIF and FTRF, 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 as adverse developments continue to intensify.
- Concern about finances. The battle against book banning and censorship entails considerable and increasing costs for PPA, OIF, and FTRF. Will need to re-focus our efforts somewhat towards fundraising.
- Increased profile of book banning by President Biden is an important positive development in our advocacy, but it also reinforces the idea that the issue is a partisan one (i.e., Democrats v. Republicans), when in fact it is not.
- The two consultants and law firm hired to perform the duties of the departed Megan Cusick have done reasonably well, along with increased efforts by the Chapter Relations Office. However, the cost of this solution exceeds current budget. While short-term needs were addressed, PPA will need to evolve towards a sustainable solution.

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

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

- ALA members and leaders, reached via email, press releases, 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
- ALA endowment fund board members, who met at the PPA office in Washington, D.C.
- 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
- Journalists covering intellectual freedom and access to information and digital equity
- ALA and division/affiliate members identified & recruited by PPA staff to speak with local and national media
- Members of ALA's national policy coalitions
- Attendees at a May 18 symposium, organized by ALA and the Library Copyright Alliance with the Law School at American University in Washington, D.C., for library and copyright legal experts to explore the concept of Contract Override
- Attendees at the following events, where PPA staff presented:
  - United for Libraries webinar, "Hammer, Vise, and Lever: Better Tools, Stronger Advocacy," April 5
  - Texas Library Association panel, "Hammer, Vise, and Lever: Better Tools, Stronger Advocacy, April
  - ALA ConnectLive report for "Our Brave Communities: Embracing School Librarians," April 25
  - "Leadership Roundtable on Support of Audio Archive Research," Radio Preservation Task Force Conference, Library of Congress, Washington, D.C., April 27
  - Guest lecture in the "Foundations for Information Professionals" course, College of Information Studies, University of Maryland, College Park, May 3
  - "The Future of Library Digital Content," panel at Level Up, the Maryland Library Association & Delaware Library Association 2023 Conference, Cambridge, Maryland, May 12
  - "Libraries Build Business: Cultivating a Thriving Local Economy with Library Programming and Services" at Maryland Library Association/Delaware Library Association Conference, May
  - Overview of Libraries Build Business at the National Council for Literacy annual meeting, May

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

There was considerable engagement with stakeholders during this reporting period. The new ALA Policy Cadre advocating against book banning and censorship began its work with a number of publications and activities, notably a panel at the Maine Library Association conference. The law symposium at American University spread the word about the plight of library digital book access to law professors both in the U.S. and internationally. And efforts to engage stakeholders in the UABB campaign ramped up, in the corporate sector as well as non-profits. One result is the sponsorship of the Rally for the Right to Read at Annual Conference by Ingram, EBSCO, and Penguin Random House.

In the context of UABB, there is a goal of fostering much greater engagement, leadership, and coordination with the library community, publishing community, and nonprofit organizations across the political spectrum. PPA has begun to step up our efforts and will need to intensify them in the months to come.

Describe the Most Impactful Unit Activities this Quarter:

- Launching ALA's annual #FundLibraries campaign on FY2024 federal appropriations for libraries, including:
    - hosting the #FundLibraries Congressional Fly-In, presented in partnership with COSLA, March
    - mobilizing advocates to generate signatures for Dear Appropriator letters when released in the House and Senate, March/April
    - hosting a #FundLibraries virtual fly-in, May
- Contributing to the drafting, review and/or introduction of several bills: the Right to Read Act, the Prison Libraries Act and the MSWs in Libraries Act
- Leading and/or supporting National Library Week activities and events, including:
    - Right to Read Day (UABB)
    - Take Action for Libraries Day advocacy campaign
    - University of Maryland event with ALA President Lessa Pelayo-Lozada
    - Libraries Build Business Capitol Hill briefing on libraries and economic opportunity
- Advancing the Unite Against Book Bans campaign, including:
    - Contributing to media coverage of 2022 book ban data
    - Ramping up a new ALA Policy Corps initiative led by Kent Oliver to combat book banning and censorship at the state and local levels
- Working with congressional offices to support libraries on social media during National Library Week
- Leading advocates to oppose H.R. 5, the so-called "Parents Bill of Rights Act," which would open the door to more book banning in school libraries nationwide; ALA's opposition was repeatedly cited during Congressional debate about the bill

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

- ALA Annual Conference sessions, including the Rally for the Right to Read, featuring Dr. Ibram X. Kendi, and opening general session speaker FCC Chairwoman Jessica Rosenworcel
- Continued co-leadership on Unite Against Book Bans, including support for state and local libraries facing book bans, and a social media campaign with coalition partners for the 70th anniversary of the Freedom to Read statement (June 25)
- Preparation for National Voter Registration Day (Sept. 19), updating and promoting resources for libraries
- Searches for Associate Executive Director for PPA and CMMO Director
- UABB staff strategy planning session in August
- Presentations and participation in the American Association of Law Libraries conference and IFLA Conference.
- Develop plan and strategies for digital access advocacy based on learnings from the May symposium at American University

PUBLIC PROGRAMS OFFICE (PPO)
Unit Manager: Melanie Welch

# of Staff: 9

Revenue Stream(s) the Unit Supports:

☒Contributed Revenue

Unit Financial Report YTD:

Financial Summary March 31, 2023	Actual FY to date	Budget	Variance
Revenues	$ 6,966,285	$ 3,941,741	$ 3,024,544
Expenses before Overhead	1,248,803	3,671,445	2,422,642
Contribution Margin	5,717,482	270,296	5,447,186
Overhead Allocation	184,745	423,483	238,738
Net Surplus (Deficit)	$ 5,532,737	$ (153,187)	$ 5,685,924

Statement of Division or Unit Financial Performance:

The variance in revenue is impacted by when funder payments are received, which can be difficult to predict in advance. Expense variances are due to the same issue: PPO will be giving nearly $4 million in grants and supplies to hundreds of libraries over the next few months. Lastly, salary expense variances are mostly due to changes in how PPO grants pay ODLOS staff costs: we originally planned to cover a larger percentage of staff time in ODLOS, but are now splitting it with the Mellon grant, allowing us to cover staff for longer. Most PPO activities are funded by multi-year grants and staff focus on spending funds by the end of the grant period.

Statement of Assumptions or Projections for the remainder of the Fiscal Year:

We expect the Actuals to more closely align with budget as we pay out grant award funds to libraries and get closer to the end of the fiscal year.

Status Report on Pivot Strategy, Aligned Unit Goals:

PPO contributes to the Pivot Strategy mainly through contributed revenue, which in turn plays a role in supporting membership, publishing, and data goals by incorporating costs for pilot memberships, ALA publication purchases and Association Analytics fees in our grant budgets. PPO is the leading grantmaking entity within ALA; the office distributes much of the money it raises from national grant-funded projects in the form of programming stipends and grants to libraries across the US. PPO staff are experts in partnership cultivation, grant prospecting, grant writing and project implementation management. Our reputation is excellent, allowing us to maintain years-long relationships with funders and partners and paves the way for new funding and projects down the road.

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

With the political clashes over the federal debt ceiling, PPO is preparing for the possibility that payment timing for our federal grants may be impacted. According to the Washington Post, federal agencies have been asked to delay making payments in an effort to conserve cash if the federal government moved toward defaulting. This could trickle down to grantees and pass-through entities, like PPO, in the form of late grant payments or affected grant application schedules.

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

- ProgrammingLibrarian.org Statistics **-** Users: 60,509; Pageviews: 162,301; Unique pageviews: 147,355
  - Top visited PL.org pages: 9 Places You Can Apply to for Program Funds (2,158 views); Asian/Pacific American Heritage Month (1,265 views); Reaching Teen Readers: 5 Creative Ways to Build a Great Stories Club (1,109 views)
- One library hosted the *World on the Move: 250,000 Years of Human Migration* exhibition, kicking off the tour.
- 240 small and rural libraries received *Libraries Transforming Communities: Accessible Small and Rural Communities* grants.
- 30 small and rural libraries received *Community Connect: Fostering Digital Access* grants.
- 1000 registrants for the free *Preparing for Program Challenges at your Public Library* webinar on May 31. It will be recorded.

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

PPO is seeing a temporary decrease in applications submitted for some grant opportunities. While we are not certain about the cause of this decline, we have a couple suspicions: it could be caused by post-pandemic burnout and/or it is a reflection of the intellectual freedom crisis. In phone discussions with librarians, their reasons for not applying or finishing applications have included being understaffed, lack of capacity, and needing to cover multiple positions for those who have left the field/library. However, we are seeing the biggest drop in applicants for reading and discussion programs for teens that feature books with LGBTQIA+ and race themes, which are the topics most under fire.

Describe the Most Impactful Unit Activities this Quarter:

- Distributed $3.4 million to 240 small and rural libraries, representing 43 states and the Northern Mariana Islands, for *Libraries Transforming Communities: Accessible Small and Rural Communities*.
- *Thinking Money for Kids* traveling exhibition concluded after visiting 50 public libraries across the U.S. Hosts implemented public programs on financial literacy topics.
- 30 small and rural libraries selected for *Community Connect: Fostering Digital Access*, representing 21 states.
- Brookings (S.D.) Public Library, Gill Memorial Library (N.J.) and Mount Kisco (N.Y.) Public Library received the 2023 Peggy Barber Tribute Grant.
- Carlsbad (N.M.) Public Library and Lexington (N.E.) Public Library received the 2023 Libraries Transform Communities Engagement Grant.

Important Activities and Events Planned Through End of Next Fiscal Quarter:

- Grant applications will open for Phase 2 of *Americans and the Holocaust*. It will travel to another 50 libraries.
- Grant applications will open for the *Thinking Money for Kids* Program Kit. Up to 200 kits will be awarded to public libraries for youth personal finance programming.
- Up to 35 grants to libraries for *Great Stories Club: Imagining Tomorrow: Building Inclusive Futures*.
- Up to 100 grants to libraries for *Great Stories Club: Reading and Discussion for At-Risk Youth*.
- PPO will offer 2 pre-conference workshops, 2 News You Can Use sessions, 2 concurrent programs and the Outreach and Engagement poster session at Annual Conference.

- An Accessible Small and Rural Communities Practitioner's Guide and a guide on hosting accessible community conversations will be released via *Libraries Transforming Communities*.

PUBLISHING & MEDIA

Unit Manager: George Kendall

# of Staff: 44

Revenue Stream(s) the Unit Supports:

☒Publishing

Unit Financial Report YTD:

Financial Summary March 31, 2023	Actual FY to date	Budget	Variance
Revenues	$ 4,818,871	$ 5,340,356	$ (521,486)
Expenses before Overhea	3,647,897	3,575,715	(72,182)
Expenses before Overhea	1,170,974	1,764,641	(593,668)
Overhead Allocation	1,267,978	1,415,192	147,214
Net Surplus (Deficit)	$ (97,004)	$ 349,450	$ (446,454)

Statement of Division or Unit Financial Performance:
At the end of March 2023, revenues for the department as a whole were estimated to be approximately 9% below budget, and although we are still projecting that some of that deficit will recover by the end of the fiscal year, publishing units did not see the return of advertising hoped for in Q1 or Q2. All publishing units are monitoring closely and seeking creative strategies to close the gap. So far, Q3 revenues have improved as we lead up to Annual Conference.

Statement of Assumptions or Projections for the remainder of the Fiscal Year:
Mid-Q3 the revenues are increasing over the previous two quarters. Leading up to Annual Conference, most publishing units will see a spike in revenues; however, because July and August are generally slower revenue months, we expect total fiscal year revenues to underperform against budget, ending the year approximately down from budget by ~8% overall.

Status Report on Pivot Strategy, Aligned Unit Goals:
Pivot strategy goals for Publishing & Media include building public markets and fostering non-US markets. Each unit is focused on these goals and is achieving them in various ways. *Booklist's Booklist Reader* and its new partnership with PBS Books will help to reach library patrons. RDA has translation agreements in the works and is Publishing & Media's most internationally recognized product. Articles in the March/April and May issues of *American Libraries* included a feature package on how the pandemic has reshaped libraries three years later, an article about teens working with libraries to advocate for intellectual freedom, an interview with acclaimed author Angie Thomas, and an ALA Editions excerpt about libraries providing sexual and reproductive health information. Graphics added PPAO's "Fund Libraries" merchandise to the virtual Gift Shop. ALA Editions | ALA Neal-Schuman signed two new titles with an EDISJ focus

including the tentatively titled *Critical Data Storytelling for Libraries*, which will appear in the ALA Neal-Schuman Critical Cultural Information Studies Series, and the 11th edition of the *Intellectual Freedom Manual*, a best-selling textbook produced in partnership with OIF. Our partnership with Sourcebooks continues with the newly released *[American Library Association Recommended Reads and 2024 Planner: A 17-Month Book Log Organizer with Stickers](#)*. This planner includes *Booklist* reviews and sales have been robust so far.

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 Q3 stubbornly remain approximately 9% 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). Economic headwinds, which pressured *Booklist* advertising revenues through Q2, appear to be easing in Q3. Advertising interest in, and print subscriptions to, *Booklist Reader* are growing into year-end. *American Libraries* saw lagging digital advertising sales in Q3 primarily because of a decline in email marketing interest among vendors, but the magazine saw strong June issue print sales (nearly 88% above budget; these receipts should post in Q3), indicating vendor enthusiasm for the ALA Annual Conference in Chicago. ALA Editions | ALA Neal-Schuman took advantage of School Library Month to focus on content in this area. A [mini catalog for school librarians](#) was created in coordination with AASL, several ALA authors contributed to [School Librarian Origin Stories](#) pushed out via eblast and available on the Editions blog, and we held a $15 off sale on related backlist titles.

Digital Reference (RDA) met with RDA translators in May and had a productive discussion that addressed steps needed to accelerate the completion of their work. An agreement for a Spanish translation took significant steps forward and talks began with Ukraine and Romania for new translations.

# of Members/non-members/other stakeholders reached during quarter (for all Units):
Booklist Q3 FY23
- Booklist Online avg. monthly pageviews 131,507 (+16,159 from Q2)
- Booklist: 6,717 avg. print subscribers (-600 from Q2)
- Booklist Reader: 67 subscribers, 4,600 circ (+3 subs, +800 circ from Q2)
- 3,374 avg opens for BOL-hosted digital editions (-206 from Q2)
- 1,536 avg opens for Zinio/Overdrive-hosted digital editions (+24 from Q2)
- 89 institutional digital subscriptions (+3 from Q2)
- 260,015 enewsletter subscriptions (+1,196 from Q2; top list 105K)
- 5,424 active profiles, Booklist Online (-141 from Q1)
- 44,449 Twitter followers (+49 from Q2)
- 16,749 Facebook page follows; (+86 from Q2)
- YouTube channel subscribers: 595 (+41 from Q2)
- 2,642 LinkedIn followers (+546 from Q2)
- 930 Instagram followers (+291 from Q2)
- Q3 Podcasts: 1,481 listens for 4 podcasts (Shelf Care and Shelf Care Interview)
- Q3 webinars: 15,217 registrants for 16 webinars (we still have two more webinars in May)

American Libraries and AL Direct Q3 FY23
- 45,564 recipients AL print (March/April and May issues) (-1,950 from Q2)
- 32,195 average recipients weekly AL Direct (+835 from Q2)
- 12,557 podcast listens (FY23 cumulative = 42,936)
- 94,836 Twitter followers (-481 from Q2); 20,704 Facebook page followers (-18 from Q2)

ALA Editions/ALA Neal Schuman Q3 FY23
- No catalogs mailed in Q3 (44,000 mailed in Q2)
- 5,555 orders (+2743 from Q2); 10,081 net units purchased (-10,043 from Q2)

ALA Graphics Q3 FY23
- 59,700 catalogs mailed (0 mailed in Q2)
- 1,421 orders (+403 from Q2); 7,744 net units purchased (+1,447 from Q2)

ALA Store Q3 FY23
- 143,359 sessions (+1,311 from Q2)
  - Note: Unique sessions stats not available in Google Analytics
- 310,390 unique pageviews (+14,601 from Q2)
- Users spend an average of 1:44 minutes per visit to the store (+ 1 sec from Q2)
- 50.8% of users find the store via organic search; 24.6% of users find the store via direct link (vs 28.5% in Q2)
- 20.1% of users find the store via referrals from other sites (50.69% from ala.org); 2.6% of users find the store via social media (vs same in Q2)

Digital Reference/RDA Q3 FY23
- 2,301 Toolkit subscribers (+32 from Q2)
- 9,233 8,913 users (+320 from Q2)
- 1,587 RDA-L email subscribers (+7 from Q2)
- 1,761 subscribers to RDA Toolkit YouTube Channel (+54 from Q2)

Narrative Description Members/non-members/other stakeholder engagement:
The magazines—*Booklist* and *American Libraries*—have more measurable direct engagement than products such as books, posters etc. One of our clearest measures of member/ non-member activity and engagement would be percentage of transactions with member discounts. A high percentage of our sales do not have linked member information because they go through distributors (Amazon, Baker & Taylor, EBSCO, etc.) that use proprietary ordering systems and do not share customer data (*Booklist* is addressing this by adding ALA member single sign-on functionality to the website. This should be completed by Q1 FY24.) Some orders are placed by accounting/ administrative departments of institutions that may be ordering for members but do not use member numbers to apply for discounts. Webinar attendance for sponsored webinars remains strong. An 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.

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Describe the Most Impactful Unit Activities this Quarter:
Booklist Q3 FY23
- *Booklist* launched a partnership with PBS Books in May 2023. From May going forward, *Booklist Reader* will feature content in each issue of *Booklist Reader.* PBS Books will also highlight *Booklist Reader* and *Booklist* staff. For example, on May 24 PBS Books featured *Booklist's* Susan Maguire on their program.
- Including paid *Booklist Reader* print subscriptions and grant funded print subscriptions, the *Booklist Reader* print circulation is, as of June, over 11,000 copies per month.

American Libraries Q3 FY23
- Classified ad revenue for JobLIST, managed in collaboration with ACRL, ended Q3 with YTD sales for the first nine months of FY23 with $380,000/unit, or 23% better than budget. The job market continues to be strong as Q3 sales were nearly $128,000/unit, more than 16% better than budget.
- The March/April and May issues of *American Libraries* featured an editorial package on how the pandemic has reshaped libraries (March/April), as well as the annual Library Systems Report (May). There were also articles about teens working with libraries to advocate for intellectual freedom, interviews with author Angie Thomas and poet Clint Smith, and an ALA Editions excerpt about libraries providing reproductive health information to patrons*.
- Posted online-only articles about the one-year anniversary of the shooting deaths at Robb Elementary School in Uvalde, as well as coverage from the US Book Show and a Librarian's Library column from Ken Bigger, ALA senior fellow at the Center for the Future of Libraries. Four podcast episodes were also released in Q3.

ALA Editions/ALA Neal-Schuman Q3 FY23
- Published a total of 7 book projects. The cumulative total of books for FY23 is 30, plus 12-14 Facet titles.
- Emily J. M. Knox won the Eli M. Oboler Memorial Award, which recognizes the best published work in intellectual freedom, for her Neal-Schuman title, *Foundations of Intellectual Freedom*.

- In coordination with PPO, 243 Libraries Transforming Communities: Accessible Small and Rural Communities grantees received copies of *Library Programming for Adults with Developmental Disabilities* and *Serving Patrons with Disabilities: Perspectives and Insights from People with Disabilities*. The grantees were from 43 different states and one U.S. territory.

Digital Reference/RDA Q2 FY23

- An in-person meeting of the RDA Board and RDA Steering Committee (both separately and jointly) in May produced lively debate about the RDA standard and set new long-term goals to strengthen the business and improve service to the cataloging community.
- The google workspace account used for RSC and RDA Toolkit work was successfully transferred over to the larger ALA account as a money saving effort.

ALA Graphics Q3 FY23

- Published 24 new products in the spring/summer catalog including the Dolly Parton READ® poster.

Important Activities and Events Planned Through End of Next Fiscal Quarter:

By the end of the fiscal year, *Booklist* plans to launch a new website that will include a completely new design and many new functionalities and features. The site will also include ALA member single sign-on and the *Booklist* team plans to restrict some content that is now free for everyone to free only for ALA members. We will then work with the membership unit to promote *Booklist*-ALA member content.

ALA Editions | ALA Neal-Schuman books published in FY23, Q4 will include second editions of best-sellers *Leading for School Librarians: There Is No Other Option* and *LGBTQIA+ Books for Children and Teens;* a new title with AASL*, Assessing Learners: Using the AASL Standards to Measure Competency and Growth;* and *Decolonial Archival Futures,* which is a partner project with the Society of American Archivists. We have been actively working to get our authors involved in ALA events and will have two dozen presenting at ALA Annual 2023. *American Libraries'* June issue will feature an Annual Conference Preview, Chicago Dining Guide, staff picks for things to do, see, and eat, as well as an interview with *Jeopardy!* champion and host Ken Jennings. The June episode of *Call Number* will feature libraries and librarians in Chicago. The editorial team will cover Annual and distribute the *Daily Scoop* e-newsletter during the conference. The July/August digital-only issue will feature wrap-up coverage from Annual.

Digital Reference (RDA) team will focus on continued orientation efforts to customers to prepare them for transition to the revised standard, including a free webinar series directed at the Oceania region in June. New releases to RDA Toolkit are planned for July and September. ALA Graphics and ALA Editions/Neal-Schuman will operate a Conference Store at Annual near the entrance to the Library Marketplace.

REFERENCE AND USER SERVICES ASSOCIATION (RUSA)

Unit Manager: Bill Ladewski

# of Staff: 1.8 (one staff member divides time between RUSA and YALSA at a .8 FTE to .2 FTE ratio, respectively)

Revenue Stream(s) the Unit Supports:

☒Membership

☒Continuing Education

Unit Financial Report YTD:

Financial Summary March 31, 2023	Actual FY to date	Budget	Variance
Revenues	$ 174,653	$ 194,963	$ (20,310)
Expenses before Overhe	141,526	183,948	42,421
Contribution Margin	33,126	11,015	22,112
Overhead Allocation	6,768	8,167	1,399
Net Surplus (Deficit)	$ 26,358	$ 2,848	$ 23,510

Statement of Division or Unit Financial Performance:

RUSA is currently tracking ahead of budget with a net $23k positive variance to budget. This variance should close in subsequent months, putting actual figures closer to budget. The positive variance is mostly due to award sponsor revenue currently being recognized, but not award winner payments. Award winner payments will occur in April and May. This budget timing issue will be corrected for the FY24 budget to hopefully minimize these variance swings.

Statement of Assumptions or Projections for the remainder of the Fiscal Year:

RUSA membership revenue is slightly down about 2% and we expect this trend to continue for FY23. CE revenue is down 22%, however we expect this variance to close/improve as we move through the end of the fiscal year. CE had a slow 1Q, however our CE calendar is now full through the remainder of the year. We expect to 'catch up' to budget expectations with our robust CE programming through the end of the fiscal year. Total direct expenses should remain below budget through the end of FY23. This is mostly due to a staff position that was budgeted for that will not be filled.

Status Report on Pivot Strategy, Aligned Unit Goals:

Goal 1 - Increase RUSA Membership by 1% per year: RUSA membership is currently down approximately 2% this membership year. We do not anticipate reaching our 1% growth target and are adjusting our expenses where possible.

Goal 2 - Increase RUSA Continuing Education revenue by 2% per year: RUSA CE is currently tracking below expectations, but we anticipate making up ground during the fourth quarter. It is our hope that we will still meet this goal of 2% CE growth in the current 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:

# of Members (for Divisions): 2,461 (April 2023 statistics)

# of Members/non-members/other stakeholders reached during quarter (for all Units): Over 50,000, through promotion this quarter of the RUSA Virtual Forum, with support from ALA production services.

- RUSA membership: The projected decrease in membership for this membership year remains a primary concern. RUSA is reliant essentially on two revenue streams, membership, and CE. The expected underperformance of membership against budget will require CE to hopefully exceed budget expectations to cover the negative variance of membership. RUSA will also look to see what expenses can be reduced or cut to offset the anticipated underperformance of the membership revenue line.

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

- RUSA is pleased with the engagement and participation expected at this year's Annual Conference. RUSA will be hosting a total of 39 programs and meetings at the Annual Conference, and per the most recent ALA pace report, 11.59% of RUSA members are currently registered to attend the Annual Conference.

- The RUSA Professional Resources Committee (PRC) oversaw several updates to RUSA Guidelines, including *Guidelines for Secondary Source Literacy for History*, *Guidelines for Business Information Responses*, and *Guidelines for Resource Sharing Operations Management*. The PRC also made the difficult decision to sunset three Guidelines that had not been updated in many years and for which there was no obvious committee to undertake a review: *Health and Medical References Guidelines*, *Guidelines for the Development and Promotion of Multilingual Collections and Services*, and *Guidelines for Library Services to Spanish-Speaking Library Users*.

Describe the Most Impactful Unit Activities this Quarter:

RUSA Virtual Forum: RUSA hosted its 2nd annual Virtual Forum on March 28th and March 30th. 94% of the respondents to the evaluation survey said that the Forum met or exceeded their expectations. The Virtual Forum should meet its budget and RUSA leadership recently agreed to continue to offer the RUSA Forum for the next two years.
RUSA Achievement Awards: The winners of the RUSA Achievement Awards were announced in March. A total of 24 award winners were recognized and a virtual award ceremony is planned for July 20th.

Important Activities and Events Planned Through End of Next Fiscal Quarter:

ALA Annual Conference: A majority of staff's focus this upcoming quarter will be on preparing for and fulfilling the many RUSA activities at the Annual Conference. Highlights include RUSA's informal membership meeting "*Coffee & Conversations*," the RUSA President's Program, "***Leading for Justice: Surveying the Intersection of Social Justice and User Services,***" RUSA ETS Technology Showcase, New Discoveries in Reference: The 29th Annual Reference Research Forum, and the ALA Trivia Championship, which is being co-hosted with the Gaming and New Member Roundtables.

Achievement Awards Virtual Ceremony: This virtual ceremony acknowledging all the 2023 Achievement Award winners will be held Thursday, July 20th.

SUPPORT SERVICES

Unit Manager: Lorelle Swader

# of Staff: 1.5

Revenue Stream(s) the Unit Supports:

☒Conference Services ☒Membership ☒Publishing

☒Continuing Education ☒Contributed Revenue

Unit Financial Report YTD:

Financial Summary March 31, 2023			
	Actual FY to date	Budget	Variance
Revenues	$ -	$ -	$ -
Expenses before Overhe	126,838	43,146	(83,692)
Contribution Margin	(126,838)	(43,146)	(83,692)
Overhead Allocation	-	-	-
Net Surplus (Deficit)	$ (126,838)	$ (43,146)	$ (83,692)

Statement of Division or Unit Financial Performance:

Staff Support Services is running over budget due to no chargebacks to units for their postage expenses have been made this year and payment of several outstanding vendor invoices from previous fiscal years.

Statement of Assumptions or Projections for the remainder of the Fiscal Year:

The project management issues in the unit have now been rectified and some salary savings may be realized by the end of the fiscal year.

Status Report on Pivot Strategy, Aligned Unit Goals:

Support Services personnel have been integral parts to the Staffing Synergies and Alignment cross functional team. New directional signage and active coordination of visitors to the new Chicago office have been undertaken. Several groups have actively begun to use the facility.

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

With the changes in overall COVID-19 protocols, we have begun to welcome more groups and visitors to the building.

# of Members/non-members/other stakeholders reached during quarter (for all Units): Over 80.

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

We are continuing to make modifications to the mailroom procedures and services for staff support. Additionally, we are also adding mapping locations within the facility.

Describe the Most Impactful Unit Activities this Quarter:

There has been transition in the staffing and procedures within the unit to provide better customer service.

Important Activities and Events Planned Through End of Next Fiscal Quarter:

Plans are underway to have leadership tours of the new office location during the upcoming Annual Conference in Chicago.

UNITED FOR LIBRARIES

Unit Manager: Beth Nawalinski

# of Staff: 2.8 (0.8 unfilled)

Revenue Stream(s) the Unit Supports:

☒Conference Services ☒Membership ☒Publishing

☒Continuing Education ☒Contributed Revenue

Unit Financial Report YTD:

Financial Summary			
March 31, 2023			
	Actual FY to date	**Budget**	**Variance**
Revenues	$ 153,748	$ 195,250	$ (41,502)
Expenses before Overhe	171,155	196,912	25,757
Contribution Margin	(17,407)	(1,662)	(15,745)
Overhead Allocation	6,415	11,246	4,831
Net Surplus (Deficit)	$ (23,822)	$ (12,908)	$ (10,914)

Statement of Division or Unit Financial Performance:

Revenues less than budgeted due to timing of receipt and application of revenues. Expenses less than budgeted due to timing of filling open position.

Statement of Assumptions or Projections for the remainder of the Fiscal Year:

The fourth quarter budget projections include revenue from corporate donations, statewide training renewals, ticketed events during the ALA Annual conference, and the United for Libraries virtual event. United is on target to meet revenue in these categories. Final revenue for membership (tracking ahead of budget) and group membership (tracking behind budget) are difficult to project as the FY23 budget was set before the conversion of personal to group members was voted on and implemented by the United board. Expenses are projected to be ahead of budget for FY23, primarily due to the timing of filling a vacant position.

Status Report on Pivot Strategy, Aligned Unit Goals:

United welcomed and rolled out statewide training for Wisconsin in the third quarter and confirmed launch of statewide access to Short Takes for Trustees for Colorado to launch in August 2023. The third annual United for Libraries Virtual is scheduled for August 1-3, 2023. Registration opens June 12, 2023. Conversion of group to personal members continues to be a significant focus of staff with favorable results. The March 2023 membership report shows a bump in membership of over 26% since the same time last year!

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, program and material challenges, and the impact on library boards continues to be a United member, constituent, and board focus. United board and member leaders and staff continue working to enhance current resources and training and development new opportunities to support library Trustees, Friends Groups, and Foundations the areas of governance, succession planning, board development, and advocacy.

Additionally, resources and learning opportunities were presented and are in development on topics for Friends Groups and Foundations, including fundraising, financial best practices, membership drives, and more.

# of Members (for Divisions): **3,884 (as of March 2023)**

- Note on group members: as part of the group to personal conversion, we have started the transition of statewide group members to the statewide training model. The first state converted was South Dakota. State conversion combined with the sunset of group membership that started with 11/30/22 expirations, will result in the group numbers decreasing over the next 2-3 years.

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

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

The March 2023 membership report shows a bump in membership of over 26% since the same time last year. Learning Live and free access to BoardSource member benefits continue to be our most popular personal membership benefits.

United for Libraries partnered with Chapter Relations and the Committee on Library Advocacy to present, "Hammer, Vise, Lever: Better Tools, Stronger Advocacy." On-demand access is now an ALA Member Exclusive product.

United held a two-part webinar series in April, "Bringing in the Money: How Friends and Foundations Can Find Funding & Grant." with more than 600 registrants.

Describe the Most Impactful Unit Activities this Quarter:

Our two Emerging Leaders teams are wrapping up their project work to be presented at ALA Annual Conference. The two projects are:

- Working with Library Boards/Trustees, Friends Groups, and Foundations: How United for Libraries Can Help Prepare Future Library Leaders
- Trustees, Friends, and Foundations as Library Advocates: Challenges and Best Practices

United held two (2) paid webinars, three (3) Learning Live member/paid webinars, and three (3) free webinars. Staff presented virtual sessions for the Alaska Library Association conference and the Minnesota Association of Library Friends. Board member Skip Dye presented on an Ecosystem Task Force webinar.

Important Activities and Events Planned Through End of Next Fiscal Quarter:

- Learning Live (webinars)
- The Library Ecosystem: ONE VOICE for Advocacy (webinar)
- National Friends of Libraries Week (webinar)
- 2023 ALA Annual Conference
    - Six (6) educational programs.
    - Four (4) author panels.
    - Two (2) drop-in "Ask the Experts" sessions.
    - Two (2) ticketed author events.

- o   One (1) President's Program
- o   One (1) United board meeting
- o   One (1) roundtable discussion
- o   One (1) program with the Philanthropy Advisory Group
- 2023 United for Libraries Virtual: Topics include:
  - o   Advocacy
  - o   Best Practices
  - o   Collaboration & Joint Impact
  - o   Fundraising
  - o   Membership & Volunteers
  - o   Unite Against Book Bans

YOUNG ADULT LIBRARY SERVICES ASSOCIATION (YALSA)

Unit Manager: LaMoya N Burks

# of Staff: 3 -- 1 full time staff member, 1 subcontractor, 1 temporary

Split funded Staff Across Units = 2 staff members at 20%, 1 staff member at 12.75% (25% Publishing &Media)

Revenue Stream(s) the Unit Supports:

⊠Conference Services ⊠Membership ⊠Publishing

⊠Continuing Education ⊠Contributed Revenue

Unit Financial Report YTD:

	Actual FY to date	Budget	Variance
Revenues	$ 280,526	$ 339,457	$ (58,931)
Expenses before Overhe	284,094	274,648	(9,447)
Contribution Margin	(3,568)	64,809	(68,378)
Overhead Allocation	20,820	20,448	(372)
Net Surplus (Deficit)	$ (24,388)	$ 44,362	$ (68,750)

Statement of Division or Unit Financial Performance:

Unit financial performance deficits reflect the need to increase revenue over expenses. Planned projects are necessary to improve outcomes. Additionally, YALSA membership numbers have improved slightly but will continue to present a challenge to revenue unless significantly increased.

Statement of Assumptions or Projections for the remainder of the Fiscal Year:

YALSA is pursuing opportunities to improve revenue outcomes by the end of the fiscal year through planned projections to impact sales of merchandise in ALA Store, advancing membership by continuing the prospective and lapse

membership campaign with Masterclass subscriptions, increasing content though partnership with ALA Continuing Education offerings, and early registration for Symposium 2023. The end of the fiscal year August 31,2022 resulted in $44,601.00 in registration income and $57,001.00 in overall income for Symposium 2022. YALSA will continue with the same projections for August 2023 in pace reporting.

YALSA seals revenue is focused on reaching the fiscal year goal of $35,000 this year, compared to the FY22 revenue for seal sales of $33,129.00.

Methods to best approach the Symposium 2023 discounted registration rate exclusively for speakers will improve greater revenue outcomes by $6,000. Extending the discounted rate beyond the designated population poses a risk for YALSA. The 2023 goal number of speakers for the conference is 23. Efforts to work with ALA Conference Services on how to support registration are in progress and will be confirmed to launch early registration by June 29, 2023.

The focus on digital advertising and Division sponsorships assists to improve outcomes beyond Symposium 2023 impacting YALSA overall revenue at least by $15,000 (2022 sponsorships result $11,000 and $1,000 in digital sales so far for 2023)

Status Report on Pivot Strategy, Aligned Unit Goals:

MEMBERSHIP STATISTICS

- Official YALSA membership numbers as of April 2023
  - Total YALSA membership - 3,247
  - Personal memberships - 3,040
  - Organizational memberships – 195
  - Corporate memberships – 12

RETENTION EFFORTS

- YALSA office emails daily "Welcome to YALSA" to new members
- YALSA office emails "Thank you for renewing your membership"
- All efforts are made to respond within 24 hours to members who contact the YALSA office

MARKETING/ADVERTISING

- As of May 22nd, Facebook has 16,864 followers, with 1,137 new followers since 2022
- As of May 22nd, Twitter has 49,500 followers, down 461 followers since 2022
- MasterClass Campaign: Of the 4300 memberships available, 2000 subscriptions were sent to current members, lapsed members who renewed, and new members. Of those, 718 redeemed the promo.
- YALSA has created both LinkedIn and Facebook promotions with a marketing plan to boost revenue to support outcomes for Symposium 2023, Division membership, and Continuing education, advocacy

E-NEWS/E-BLASTS

- The average open rate so far is 49.70%, up 11% from 2022
- Average click rate of 5%, down .08% from 2022

PUBLIC RELATIONS

- As of May 22nd, 2023, YALSA has issued 11 press releases on topics such as YALSA book awards and lists, partnerships, YALSA election results, and more.

Digital salesperson will be onsite at ALA Conference 2023 to visit with vendors to promote YALSAs 2023 Media Kit
https://www.ala.org/yalsa/sites/ala.org.yalsa/files/content/2023MediaKit.pdf

The projected goal of 6 @ 200.00 placement ads at an estimated $1200.00. Digital ads are placed within

YALSA seals revenue for March 2023 , April 2023and May 2023 NET dollars to NET units (bundles of seals purchased) are indicated yellow:

Net Dollars MONTH 05 2023	Net Units MONTH 05 2023	Net Dollars MONTH 04 2023	Net Units MONTH 04 2023	Net Dollars MONTH 03 2023	Net Units MONTH 03 2023
256,188	8,599	257,747	7,967	223,479	7,934
55	3	586	42	1,911	80

CONTINUING EDUCATION

Month	Date	Type	Item Desc	Total Qty	Total Sales
			Thursday, June 1, 2023		
Mar	3/6/23	Bundle	Snow, Outreach for Underserved Children and Teens	19	$6,282.00
Mar	3/6/23	eCourse	Snow, Underserved Teens	18	$3,427.60
		eCourse Total		37	$9,709.60
Apr	4/12/23	workshop	Loaiza, Virtual Teen Services via Discord	22	$2,412.30
Apr	4/27/23	workshop	Hammond, Supporting Teens w/Org. and Stress Skills*	29	$1,635.30
May	5/3/23	workshop	Day/Moreno/Vickers, Using TikTok to Reach Teens*	40	$2,678.10
Jul	7/26/23	workshop	Torres/White, A Place to Belong*	19	$2,296.20
		Workshop Total		110	$9,021.90
		Online Orders Total		147	$18,731.50

YALSA and Continuing Education continue to work collaboratively to create and market continuing education options.

ALA CONFERENCE & SYMPOSIUM 2023

To date, YALSA ticket sales for events at 2023 Annual Conference include:

- Printz- approximately $5,500 - ticket sales- 131 (maximum room capacity 200)
- Coffee Klatch- $3,395 - ticket sales- 113 (maximum room capacity 200)

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

Symposium 2023 - YALSA works toward conference goals though a late start to the traditional schedule of planning; the challenge to confirm author panel and conference sessions presents an opportunity to strengthen strategies through networking, innovation, and reflection of previous successes. In 2022, sponsorship was $11,000 and 162 early registrants by August 2022. To remain on track for 2023 to reach a total 471+ attendees, YALSA seeks additional support to 1)

promote the conference to increase attendance at the state and national levels outside of the Association   2) marketing sponsorship opportunities

Governance -Additionally, training for member leaders in governance seeks to increase impact for the Division around decision making processes and unifying communications among Board members and the overall membership to align with American Library Associations best practices, and mission and values.

Member engagement & analysis - YALSA Education Advisory Committee leads the efforts in discovery by surveying YALSA members The responses will better plan member webinars, inspire ALA eLearning courses, and evaluate conference submissions to serve interests and career development.

Please see survey here: https://www.surveymonkey.com/r/LJPHR9R

# of Members (for Divisions): 3247

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

Important Activities and Events Planned Through End of Next Fiscal Quarter:

- YALSA Education Advancement Committee leads the efforts with a survey. Deadline: , Debrief TBA
- 2023-2024 YALSA Sponsorship packet updates to use for both YALSA Symposium and as a division to impact revenue completion **by mid-June 2023.**

The Young Adult Library Services (YALS) publication **launches August 14, 2023**. *YALS* serves as the official journal of the division. The journal serves as a vehicle for promoting best practices in all aspects of library services for and with teens including, designing learning spaces, building collections, leveraging technology employing youth development principles. More about YALS at http://yalsa.ala.org/blog/yals.

YALSA and Continuing Education partnership revenue to reach approximately $20,000 by the end of the **fiscal year August 2023**.