

ALA American Library Association

ALA Executive Director's Report to ALA Executive Board

Prepared by Tracie D. Hall

October 22, 2021

EXECUTIVE DIRECTOR ASSOCIATION UPDATES AND HIGHLIGHTS

Pivot Strategy Update: Launch of Cross Functional Teams

The start of the new fiscal year (September 1, 2021) signaled the formal launch of ALA's pivot plan, "The Path to Transformation." A key facet of the plan is its emphasis on knowledge sharing and problem solving across ALA's more than three dozen units and divisions. Facilitating this goal of de-siloization is the organization of cross-functional teams made up of management and non-management staff representing every area of association work.

All twenty of the following teams are scheduled to have launched by the end of FY22 with those underlined having officially launched last month:

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

Mary Mackay Appointed Interim Senior Associate Executive Director

Further supporting the goal of creating the organizational alignment necessary to achieve the pivot plan's foundational goals of increasing membership and financial sustainability, was the naming of Mary Mackay, Publishing and Media department head, to the Interim Senior Associate Executive Director role. In addition to her experience leading one of ALA's largest revenue streams, Mackay also brings her considerable knowledge of (the two pivot impact streams for which she will primarily be responsible in addition to Publishing) Conference Services operations, and insight gained overseeing the precursor to ALA's new Continuing Education revenue stream, into her new role in which she will also

have primary oversight of the cross-functional teams. ALA Executive Director Tracie Hall will continue her complementary oversight of the Contributed Revenue and Membership impact streams, with the Data, Design, and Research unit planned for launch by fiscal year end. Updates related to the existing impact streams and pivot strategy performance are found in the body of this report.

Contributed Revenue and COVID-19 Relief Grantmaking

Executive Director Hall has stressed the goal of positioning ALA to earn enough contributed revenue to allow it to significantly expand its capacity to disseminate grants to the libraries experiencing funding and service reductions. Funds received from two funders: the Acton Family and the Mellon Foundation in FY21 allowed ALA to distribute grants that made a significant difference in their communities. Below are two self-reported examples from recipient libraries that indicate how important it will be to seek ongoing sources for such funding as administered through the Chapter Relations Office.

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

Nearly 75% of the 57,000 residents that the New Brunswick Free Public Library serves are Latinx, Asian, or Black, with 56% of all residents speaking a language other than English at home. The library is visited by many immigrant newcomers from an array of nations who see English as a critical skill in advancing their career goals. Forced to cut 25% of their staff, the grant will allow the re-hiring of two part-time staff to continue providing English as a Second Language instruction and career efforts to assist displaced workers and jobless out-of-school youths. The ALA COVID Library Relief Fund is supporting 48 hours of ESL classes with 56 students and 19 hours of career services per week at the New Brunswick Free Public Library. Three ESL facilitators were hired to provide beginner, intermediate and advanced levels of Conversation Groups and Conversation Cafes, with integrated literacy curriculum to support further education and workforce training. Four Career Navigators were also hired to provide one-on-one career assistance on job applications, resume and cover letter writing and interview skill training. The library started the publicity process after receiving the grant and officially started the ESL and Career Help service after the grant money was successfully allocated. Starting August 2nd, we helped about 50 people with 22 successfully getting interviews or employment. Some clients did not have sufficient computer literacy skills and were relying on staff to create and submit job applications entirely. The ESL programs started on August 23rd and 12 classes were conducted. Also, we offered a Professional Development session to the community members who were interested in becoming Conversation Facilitators. By attending this 3-hour training session, the community members were able to support adult language learners in the English Conversation Cafe.

- **Carter County Library, Kentucky**
Grant Amount: \$40,000

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

thousand new items.

- **Niagara Falls Public Library, Niagara, NY**
Grant Amount: \$45,000

The Niagara Falls Public Library serves approximately 50,000 residents in three separate counties. It has suffered a 30% budget reduction with upcoming budget cuts expected soon. The staff has been cut by 25% and nearly 30% of the community does not have dependable access to Wi-Fi, which impacts resident children's access to educational lessons, as well as adults looking for new employment opportunities. The grant will increase the number of Wi-Fi hot spots that can be loaned to families, add a part-time technology support staff, and create a needed makerspace to develop skills through hands-on learning. The library has been making progress in Niagara Falls and has been able to hire a full-time librarian with a tech background thanks to the grant and some additional library savings. Additionally, we have figured out that we have space and resources from library funding to begin the creation of a Library of Things, which will operate out of this space. To better address our patrons' needs or borrowing technology, such as the hotspots and chrome books, but also items such as a VCR DVD converter, Roku, and other such tech. Also leveraging grant to apply for more Wi-Fi hotspots and chrome books from FCC.

- **Indian Pueblo Cultural Center Library and Archives, Albuquerque, NM**
Grant Amount: \$40,000

Dedicated to the history and culture of the Pueblo people, the Indian Pueblo Cultural Center Library and Archives suffered a 30% budget cut, reducing staff from three to just one. The Library and Archives serves the 66,000 members 19 Pueblos of New Mexico and Ysleta del Sur Pueblo in Texas, as well as researchers, and the public. The grant allows the library to hire back staff, upgrade computers that are ten years old, and purchase new books and other resources for the community. ALA grant money has paid for two staff members to return full-time to the IPCC library. We are open to the public four days a week from 9am to 4pm, and on Saturdays by appointment. We have assisted students, adults, educators, and Cultural Center staff with research and access to archival collections. Research assistance also occurs online through email. Since July, we have had three book donations ranging from small to large. Library staff is processing these books into our library system, as well as labeling and shelving items. Book inventory has also been started in order to correct our catalog and to evaluate subject matter for topics lacking and for restrictions on sensitive subject matter content. Work also continues on scanning transcripts of past educational lectures to put online for patron access, as well as creating brief synopses of transcripts and dissertations by Pueblo people and/or about Pueblo topics for improved accessibility. Research is ongoing for future book and audio-video purchases. Attendance continues at webinars and various monthly meetings for tribal librarians and education directors, as well as librarians and archivists throughout the state to publicize activities and resources in the library. Continued writing monthly blog on various Pueblo & Indigenous topics to publicize the library and the knowledge to which we can connect readers. The online blog, Indigenous Connections and Collections, currently engages thousands of individuals, and covers salient topics from the Pueblo Revolt to Indigenous Women. Last month in August, the Facebook post of the blog reached 12,534 people, the highest number so far.

Equity, Diversity, Inclusion and Social Justice Inventory

Underpinning the association's new pivot plan is the central goal of creating greater equity, diversity, inclusion and social justice in library and information (LIS) services and the LIS workforce. Towards that end, Executive Director Hall requested that all ALA units report out on all active EDISJ projects and programs. ODLOS Director Kevin Strowder collected and synthesized this information which has been submitted as an attachment to this document. The volume and variety of EDISJ efforts being led by almost every unit present the opportunity to replicate, scale, and systematize

many of these initiatives. The number and reach of these activities also suggest that the association is ready to support a more comprehensive board or member led EDISJ initiative that might establish certain protocols and baselines for EDISJ competencies and practices across ALA.

Update of the Standards for Library Services for the Incarcerated and Detained

Supported by Mellon Foundation funding, ALA’s ODLOS and Executive Offices and Publishing unit are working with a team of ALA members and stakeholders to complete the first update to *the Standards for Library Services for the Incarcerated and Detained* since 1992 (see [here](#) and [here for full pdf of former standards](#)). Comprised primarily of individuals currently working in detention center libraries or public and academic libraries that supplement these services, it is hoped that the group (which will be finalized by the end of November, will complete these new, updated standards by December 2022, and that nearly 2,000 volumes of the standards will be disseminated to correctional and detention center staff in January 2023. The draft team and timeline will be reported by or before mid-December.

Transforming ALA Governance Comparative Analysis

As part of the ongoing TAG work, the Executive Office took on the task of researching and contacting peer associations to determine overall budget, membership, and governance body ratios, to staffing size. The analysis represents the most up to date information available and also illuminates different peer approaches to staff deployment across a range of different associations. See below.

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

Staffing Updates – The National and Association Workforce Experiences Flux and Opportunity

As the national workforce experiences almost unprecedented fluctuation as American workers retire or resign to seek new opportunities or to take breaks from employment, so too is ALA seeing more and more retirements from those eligible to do so (i.e., PPO’s Deb Robertson who retired after 40 years on October 8, or Publishing’s Patrick Hogan who retired at the beginning of this month after 26 years). ALA’s staff shift is being mitigated by the arrival of new staff (Jay Malone, Kevin Strowder, Judy Czarnik, for example). Beginning this year at about 220 employees, ALA currently has approximately 208 staff, with the expectation that we will be at or near 220 staff by FY end, with a goal of continuing to attract and hire the most talented and diverse staff available.

REPORTS OF ALA UNITS

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

AMERICAN ASSOCIATION OF SCHOOL LIBRARIANS (AASL)

Division Executive Director: Sylvia Knight Norton

Budget Amount: Overall Q3 Revenue \$385,638; Expense \$608,052

of Staff: 4

Status Report on Pivot Strategy, Aligned Unit Goals:

Unit Goals to align with Pivot Strategy were developed for an 18-month time period covering FY21 through FY22. This aligns with cycle of the division national conferences that are held only every other Fall. The AASL National Conference is a major revenue stream for AASL, providing significant professional development, encourages membership, and a visible presence of the association to the school library profession.

Increase Membership:

AASL has 5,477 members including 924 student members and 173 organizational members. In Q3 AASL added 4 new organizational members and 307 new personal members of which 86 are students. Several expired personal memberships were identified during the process to appoint member for AASL Committees. This may be due to the lack of communication during the pandemic when many AASL members were working remotely and not easily accessing work mail and ALA renewal reminders. Individual outreach from AASL to these lapsed members showed positive results for renewing memberships.

Increase Revenue:

AASL publishes in conjunction with ALA Editions. Expenses for AASL publications are shared with ALA Editions for several AASL Standards related books that are under development with publication due during FY22. The half year of net revenue shared with ALA Editions for the AASL *National School Library Standards for Learners, School Librarians and School Libraries* and related works is slightly more than budgeted and provided AASL with \$24,851. AASL's portion of the shared revenue is reflected in ALA performance reports as a negative expense. Overall, FY21 is a non-conference or "spend down" year for AASL with ALA Finance indicating in this recent performance report that beginning asset net balance was \$441,226. The revenue and expenses for the 2021 AASL National Conference in Salt Lake City, October 20 - 23 are deferred to FY22.

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

AASL is planning for a safe and successful National Conference that provides significant budget funds for a two-year period. More important is this biennial conference is the highly visible presence of the association to school librarians. There is great anticipation in the profession but tempered by the ever-changing pandemic conditions. We have long said that attendance at an in-person conference during these times is a personal choice but also put in place, along with our hotel and convention center partners, practices that meet or exceed CDC guidelines. AASL monitors the Covid case rate and national projections, travel safety and staff have attended webinars from the meeting and convention center industry. We have listened to presentations from independent researchers and the data models created to account for variables about demographics (educators have a high vaccination rate), location, air quality and filtration, vaccines, masks, and related data that showed less risk at a conference than typical daily activities. We have run models on room size and numbers in a session to be reassured that we are well below those limits. Procedures have been changed to eliminate lines, widen exhibit hall aisles, and request attendees wear masks. Additionally, registrants can only print a badge if they check that they are either vaccinated or if not agree to wear a mask at all times. We are mindful of the challenges yet heartened that 1,200 attendees are excited about learning, presenting, and see their colleagues.

of Members (for Divisions): 5477

of Members/non-members/other stakeholders reached during quarter 3:

- Knowledge Quest (KQ) website total views range from 31,100 to 37,930 per month.
- New Member, Renewal Member, and Reinstate Member emails: 3,914
- National Conference emails to targeted geographical area, specific audience, nonmembers, and members: 70,629
- Regularly scheduled AASL online communication vehicles:
 - AASL Digest (monthly) – 13,276 with 3,922 opens
 - Friday Forecast (weekly) – 50,855 with 13,089 opens
 - School Library Smartbrief (weekly) – 16,024

AASL social media followers were reached via:

Facebook	Twitter	Instagram	LinkedIn	Pinterest	Snapchat	TikTok	YouTube
17,274	31,683	3,095	2,647	1,489	172	9	790

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

AASL Chapter Assembly, the state school library associations, met virtually with state delegates. The majority of these state associations are not connected to ALA Chapters.

AASL Watch Party monthly events offered a webinar from our last National Conference for viewing at a mutual monthly time followed by an interactive discussion via Zoom with participants.

The AASL School Leader Collaborative, a group of school principals and superintendents selected from nominations by their school librarians, meets monthly. These decision makers in a 2-year initiative are champions of school librarians and will also provide an administrator perspective in a general session conversation at the AASL National Conference.

Describe the Most Impactful Unit Activities this Quarter:

The *AASL Town Hall: Leading Learning* were held monthly during Quarter 3 with frequent feedback on the positive way these virtual gatherings in the last year have enabled dialogue, learning, and most of all a sense of community for school librarians who often work in solo positions within their institutions. Topics in quarter included *Pathways to Leadership* and show the challenges of remote learning with titles listed in April as *The Rules Still Apply: Information Literacy During a Pandemic*, and *Reflections and Plans for the Future: Our Pandemic Year* in May.

Members leaders on the AASL National Conference Committee and AASL staff continued the active planning for a fall conference that has numerous members excited about the opportunity to present, learn, and see their colleagues in Salt Lake City in October. The National Conference Committee held a site visit in Salt Lake City to assist in the planning with a clearer understanding of the facility and surrounding area, AASL has worked with our partners at the convention center and hotels to meet or go beyond CDC guidelines. The [Health and Wellness Information](#) page is regularly updated as we monitor conditions and changing guidelines.

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

July 1 begins a new operational plan approved by the AASL Board of Directors when they met in June. Activities are based upon the goals of the AASL Strategic Plan for leadership activation, educational policy, and research. The plans actions are tied to the core values of the association (learning; innovation; equity, diversity, and inclusion; intellectual freedom; and collaboration). The board retreat just prior to the AASL National Conference in Salt Lake City will review this plan, discuss current conditions across the nation and in the association, and determine any necessary revisions to next steps.

AASL has partnered with Pokémon for school librarians to receive resources for [Pokémon Clubs](#) with game playing that encourage learners to think critically and problem solve while interacting with peers.

The AASL President Jennisen Lucas and Executive Director Sylvia Knight Norton were asked to present to a media literacy conference about the AASL Standards and connections to social justice.

ASSOCIATION OF COLLEGE AND RESEARCH LIBRARIES (ACRL)

Division Manager Executive Director: Jay Malone

Budget Amount: Revenue \$3,929,775; Expenses \$4,470,639/Net -\$540,864 (FY21 budget)

of Staff: 14

Status Report on Pivot Strategy Aligned Unit Goals

Work continued in Q4 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 end of FY22. Staff continued using webcast and other event registration/sign-up email lists in newsletter and marketing distribution this quarter, including non-member attendees. Sending email about ACRL activities helps keep non-members engaged in the association and will hopefully drive future membership.

Planning, development, and design work was completed on targeted marketing of individual membership to non-members through a digital marketing campaign focusing on non-member ACRL 2021 conference attendees, non-member webcast attendees, and general ACRL website visitors. The campaigns launched in early September 2021 with an initial run of one month to gauge results.

As of the June 2021 official count, individual ACRL membership stands at 8,162 and organizational membership stands at 510.

Ongoing Challenges in Higher Education

The ongoing COVID-19 pandemic continues to present challenges for academic libraries and higher education as fall terms begin in earnest. A report by ALA's Public Policy and Advocacy Office cites a [College Board study](#) that found that enrollment declined more at 2-year colleges (12%) than at private (4.5%) and public (2.8%) public colleges last year, among other effects of the pandemic on higher education. In general, higher education institutions are motivated to open for in-person instruction in fall 2021 in an effort to increase enrollment rates and maintain tuition fees. To support on-campus learning many colleges and universities have issued [mask and/or vaccine requirements](#). A [recent CNBC report](#) notes that some anticipate that "another wave of students may opt out of college this fall," potentially further impacting enrollment and budgets.

While the pandemic is a major driver of these trends, it is not the only factor impacting the future of higher education. A recent [Chronicle of Higher Education article](#) notes that "The pre-pandemic state of higher education was in flux, with five profound and jarring new realities — none of higher education's making — already beginning to shape its future. The pandemic has accelerated those changes, and it's imperative that academic leaders grasp the import of this shifting landscape." A similar observation is also made by an [Ithaka S+R report](#) examining the trend towards consolidations in public colleges and universities.

ACRL's [2021 Environmental Scan](#) notes the need for libraries and higher education institutions need to prepare for potential budget shortfalls in upcoming budget cycles, increase virtual and online services to support online learning,

and prioritize offerings that support students who are struggling financially or with technology access in order to complete their studies.

The association has developed a variety of resources to help the academic library community weather the ongoing pandemic and reopening challenges. ACRL's Value of Academic Libraries Committee sponsored a free ACRL Online Discussion Forum in August 2021 to share findings from a survey asking what protocols academic libraries used during the COVID-19 pandemic to ensure safe library operations (services, resources, spaces, personnel interactions). While the survey findings are specific to academic libraries, they are relevant to public and other libraries and other academic entities. The recorded webcast is now available on the [ACRL YouTube channel](#). Access to the full report and the de-identified data set are on the [ACRL website](#).

The [Pandemic Resources for Academic Libraries LibGuide](#) and the [Advocating for Library Workers During Uncertain Times](#) blog series and webcast provide support for library workers who are finding themselves in increasingly more complex fiscal situations, with layoffs, furloughs, and budget reductions being announced and anticipated. ACRL's [Regenerating the Academic Library](#) consulting service focuses on helping libraries navigate the impact of the massive changes in higher education and academic libraries over the past year.

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

Member and Stakeholder Reach

of Members: 8,693 (June 2021 official total)

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

- Paid E-Learning attendance: 187 individuals and 25 groups
- RBMS Conference participants: 751
- Newsletter total opens: 132,813
- Print and ebooks sold/distributed: 737
- Journal website total views (*C&RL*, *C&RL News*, *RBM*): 701,109
- *C&RL News* total print circulation (2 issues): 17,037 {Note: *C&RL News* will become an online-only publication in January 2022}
- ACRL website total visits: 104,399
- Facebook: 43,205 impressions; 2,348 engagements
- Instagram: 10,567 impressions; 617 engagements
- Twitter: 202,396 impressions; 3,454 engagements
- YouTube: 11,603 views; 1,858 hours of watch time

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

- ACRL's e-Learning program offered seven live webcasts and two online courses during this report period. 187 individuals and 25 groups participated in e-learning focusing on developing signature pedagogies, copyright and course reserves, and universal design for libraries. Upcoming topics include teaching with digital primary sources, online library instruction, and leadership and management.
- Three new ACRL books were published during the quarter and were promoted for purchase to members and other stakeholders. An open access white paper on "Transforming Library Services for Computational Research with Text Data" was also published in Q4. 443 print and individual-use ebooks were sold, along with 294 institutional ebook copies via distributors. Q4 sales were significantly hampered by the warehousing and fulfillment transfer from PDB to CDC.

Key Activities

Robert (Jay) Malone Named ACRL Executive Director - ALA has announced the hiring of [Robert \(Jay\) Malone](#) as new executive director of ACRL. Malone's first day in his new role was Tuesday, Sept. 7. Malone comes to ALA from the History of Science Society (HSS), where he served for 23 years. As the HSS's first executive director, he furthered the organization's advocacy agenda; promoted equity, diversity, and inclusion; oversaw and implemented strategic planning; created a fundraising infrastructure; served on a 22-member board; and worked with hundreds of volunteers. Malone earned a B.A. in History and an M.A. and Ph.D. in the History of Science, all from the University of Florida.

ACRL @ALA Annual Conference - ACRL sponsored 19 section, committee, and individual live and on-demand programs at the ALA Annual Virtual Conference on topics such as racial justice, student learning assessment, diverse children's literature, online instruction, emergency preparedness, the myth of library neutrality, and more. The ACRL President's Program, "Making Change: Organizing for Action While Caring for Each Other," featured Mariame Kaba, Founder and Director of Project NIA, and Dean Spade, Associate Professor at the Seattle University School of Law, with moderation by Emily Drabinski, Interim Chief Librarian at The Graduate Center, CUNY. In the session, Spade and Kaba led a conversation about how library workers can use organizing principles to fight against white supremacy and widening inequality through community action and mutual aid.

RBMS 2021 Conference - The RBMS 2021 Virtual Conference, "Power. Resistance. Leadership.", was held June 8-10, 2021. The conference critically examined the existing power structures that have shaped and continue to impact special collections and archives by exploring the power dynamics within our profession and the ways in which we experience, exert, and/or defy power. Conference programs provided participants tools and strategies to inspire and lead to transformative change. The conference had more than 750 total participants.

C&RL, PIL Editor Appointments - The ACRL Board of Directors has appointed [Kristen Totleben](#) as the next editor of *College & Research Libraries (C&RL)* and [Mark Shelton](#) as editor of the Publications in Librarianship (PIL) monograph series. Totleben, librarian for Modern Languages & Cultures at the University of Rochester's River Campus Libraries, will serve as editor designate from July 1, 2021 to June 30, 2022, when she will assume full editorial responsibility for the journal. In the position of editor, Totleben will also serve as chair of the *C&RL* Editorial Board. She succeeds Wendi Arant Kaspar, professor of Library Practice at Texas A&M University, as *C&RL* editor.

Shelton, director of Library Services at the College of the Holy Cross in Worcester, Massachusetts, succeeds Daniel Mack, associate dean of Libraries, Collection Strategies and Services at the University of Maryland, as PIL editor. He will serve a three-year term beginning July 1, 2021. The PIL series is a peer-reviewed collection of books that examine emerging theories and research.

ACRL Joins "Joint Statement on Legislative Efforts to Restrict Education about Racism in American History" - ACRL joined a number of organizations in co-signing an American Association of University Professors, American Historical Association, Association of American Colleges & Universities, and PEN America joint statement stating their "firm opposition" to legislation, introduced in at least 20 states, that would restrict the discussion of "divisive concepts" in public education institutions. The full statement is available on the [AHA website](#).

New Framework for Information Literacy Companion Documents - The ACRL Board of Directors approved three new Companion Documents to the ACRL Framework for Information Literacy for Higher Education its June 2021 virtual meeting. The new Framework Companion Documents are Companion Document to the ACRL Framework for Information Literacy for Higher Education: Politics, Policy, and International Relations; Companion Document to the ACRL Framework for Information Literacy for Higher Education: Social Work; and Companion Document to the ACRL Framework for Information Literacy for Higher Education: Women's and Gender Studies. The new Framework Companion Documents are freely available in the [Standards, Guidelines, and Frameworks section](#) of the ACRL website.

2021 ACRL Legislative Agenda - Each year, the ACRL Government Relations Committee, in consultation with the ACRL Board of Directors and staff, formulates an ACRL Legislative Agenda. Drafted with input from key ACRL committees, ACRL leaders, and the ALA Public Policy and Advocacy Office, the ACRL Legislative Agenda is prioritized and focuses on

issues at the national level affecting the welfare of academic and research libraries. The ACRL Board of Directors recently approved the 2021 ACRL Legislative Agenda. The 2021 ACRL Legislative Agenda focuses on eight issues that the U.S. Congress has recently taken, or will most likely take, action on in the year ahead along with a watch list of policy issues of great concern to academic librarians but where there is no pending legislation. The full 2021 Legislative Agenda is available on the [ACRL website](#).

Choice “Implementing and Managing Streaming Media Services in Academic Libraries” White Paper - Choice has released the eighth in a series of white papers designed to provide actionable intelligence around topics of importance to the academic library community. The paper, “[Implementing and Managing Streaming Media Services in Academic Libraries](#),” examines the factors that librarians must consider when considering the addition of streaming services to their institution, providing a quantifiable overview of the current streaming landscape in academic libraries.

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

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

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

ASSOCIATION FOR LIBRARY SERVICE TO CHILDREN (ALSC)

Division Interim Executive Director: Alena Rivers

Budget Amount: \$1,500,000

of Staff: 8

Status Report on Pivot Strategy, Aligned Unit Goals:

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

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

Aligning with the continuing education impact stream, as part of ALA’s Pivot Strategy, provided an opportunity for ALSC to connect this goal with the continuing education strategy development work that had already begun. ALSC continues to consider ways to expand on existing and successful continuing education programs, such as the Bill Morris Book Evaluation seminar and the new one-day virtual spring conference, *A Celebration of Illustration*, into revenue generating streams that will attract new members and provide exciting opportunities for existing members.

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

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

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

In January the ALSC Board approved the recommendations of the Diversifying Revenue Streams Task Force that focus on high value, high interest, proprietary content, and create an entrepreneurial culture among members and committees. A working group has been formed to further develop and prioritize the work of the task force. Of note, ALA Editions and ALSC are partnering on a publication honoring the Newbery award.

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

Many discussion topics that ALSC has engaged in or addressed with our membership over the last several quarters remain prominent, including continuing education and virtual spaces, the impact of COVID-19 on education and student success, advocating for youth services library staff, and youth and family trauma. The ALSC 2020-2023 Strategic Plan reflects these changing times and is under review by the ALSC Board to ensure its relevance and commitment to the needs of ALSC members.

- Continuing Education and Virtual Spaces – Recognizing that ALSC members have seen the benefits of and continue to seek out virtual education offerings, ALSC has been adapting and developing events to a virtual space. As the state of the pandemic ebbs and flows, ALSC has been intentionally considering the most viable options for upcoming continuing education opportunities that typically have been hosted in-person. Planning for the January 2022 Bill Morris Seminar included a review of opportunities. It was determined that a virtual setting for this event would yield the most flexible and creative options for delivering the seminar in a new format.
- COVID-19 Impact on Education and the Summer Slide – Even as schools and libraries began opening to in person learning and activities, and while libraries continue to expand their digital collections with e-books and audio books, provide curb-side pick-up for physical materials, improve WiFi and computer/tablet access to support students, these efforts are not enough to reduce the growing gaps in education for children whose educational experiences are varied, inconsistent and often inaccessible. Library professionals continued to navigate summer learning programming and considered how that programming can supplement the learning loss for students who were unable to attend school in person. ALSC's Quicklist Consulting Committee compiles and annotates free [summer reading lists](#) in four age groups. This year, along with carefully selected, diverse book titles, each list includes a Digital Experiences section to provide children and their caregivers with a curated collection of websites and podcasts that support children's continued exploration of digital resources.
- Advocating for Youth Services Library Staff – The pandemic and subsequent library closings resulted in employment reductions of library staff through furloughs, layoffs, and reduced work hours. As libraries assess their budgets going forward, the value of children's library professionals may be overlooked. Library staff who serve youth are in need of tools and resources to help advocate for their positions, both within their libraries and through local and national advocacy efforts. #LookToLibraries provides resources and highlights the value of children's library professionals as youth media mentors. In addition, the June 2021 Virtual ALA Annual Conference provided ALSC members with an opportunity to explore ALA and ALSC events and sessions dedicated to supporting advocacy efforts. ALSC members used the ALSC Blog to share information on the sessions they attended and make connections back to their work.
- Youth and Family Trauma – Library professionals and their communities have experienced children losing family members, feeling the consequences of job loss, economic instability and food insecurity, separation and isolation from family and friends, and now reentry to life as we may or may not

remember it. Additionally, our nation is experiencing political turmoil and a profound response to racial injustices that have received new and necessary attention. Our libraries are doing more now than ever to support their communities in the midst of these traumatic life changes. Library staff want to know how to identify trauma and provide informed resources to support children and their families as they navigate the outcomes these experiences have on physical and mental health. ALSC members are aware of these issues and sought feedback from members to develop continuing education opportunities that will help library staff provide trauma-informed exchanges and resources to their library communities. A blog post series on childhood trauma has started and a webinar on this topic is under consideration.

of Members (for Divisions): 3,619 (estimate as of August 2021)

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

- 3,619 Members
- 321.7k - Twitter Impressions
- 75,563 - Reach of Facebook posts
- 28,490 - Recipients of emails

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

Compared to FY20, FY21 Q4 estimates show ALSC with a 5.9% decline in overall membership. While this decline continues to be expected, there have been small successes this quarter. For example, although no in-person networking has occurred in 18 months, estimates show ALSC's recruitment of new members continues to be strong and on track with previous fiscal years. ALSC recruited 58 new members in June 2021, this number is just two membership units shy of June FY20 (60) and an increase from June FY19 (46). A steady recruitment of new members likely means ALSC's concentrated efforts on providing virtual member engagement spaces has been successful.

- Engaged 49 members in the 2021 Charlemae Hill Rollins President's Program, "The POW(!)er of Graphic Novels to Support Youth Literacy" Part I, a webinar offered exclusively to ALSC members and focused on the importance of graphic novels in libraries and programming.
 - o This webinar was also incorporated into the 2021 Comic-Con@Home event and has over 750 views.
- 92 members and non-members attended Part II of the President's Program, which featured creators: Nidhi Chanani, Jerry Craft, Varian Johnson, and Nadia Shammas.
- 38 participants in two summer online courses.
- Engaged 208 members and non-members in the live webinar, "Giving Storytime a Tune-Up: Embedding Music Activities to Support Texts and Engage Participants".

In addition to offering a variety of engagement opportunities, staff recently restructured [ALSC's Member Center](#) website to be more inviting to prospects, new, and existing members. ALSC's [New Member Center](#) mirrors the structure of ALA's New Member Center that launched in August 2021.

Describe the Most Impactful Unit Activities this Quarter:

- [2021 ALA Book Award Celebration](#) - As part of ALA Annual 2021, ALSC collaborated with ODLIS, YALSA, REFORMA, Booklist, and ALA affiliates to host The ALA Book Award Celebration 2021. Featuring videos from dozens of beloved children's book authors and illustrators, this event garnered hundreds of live viewers and thousands of total views. This event also featured the debut of exclusive illustrations from Cece Bell, Jerry Craft, Kevin Henkes, Victoria Jamieson, and Grace Lin celebrating the Newbery Medal's 100th anniversary.
- [2021 Charlemae Hill Rollins President's Program: The POW\(!\)er of Graphic Novels to Support Youth Literacy](#) – This program was presented as a two-part virtual program this summer. Part 1 was presented live to ALCS

members as a benefit of membership, and later aired on-demand as part of Comic-Con@Home's Educational programming. Part 2 aired live and was open to all; Nidhi Chanani, Jerry Craft, Nadia Shammass, and moderator Varian Johnson participated in a discussion of the power of graphic novels to engage and support youth. Approximately 80 people attended the Part 1 live session, and it has been viewed more than 750 times on Comic-Con's on-demand recording; 125 attended the live Part 2, with approximately 300 registrations.

- Continuing Education – In July, two courses began for the 2021 Summer Session: [The Newbery Medal: Past, Present and Future](#) and [Utilizing the Competencies to Boost Skills and Services](#). The Newbery course is an update of a highly popular course by KT Horning, offered as part of the ALSC #Newbery100 Celebration. The Competencies course draws on the newly revised ALSC Competencies to help students build and develop foundational skills in the field; the course also creates a rolling revenue stream based out of the competencies.

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

Newbery Publication - ALA Editions and ALSC are partnering on this practical publication that features the Newbery Award. It is an in-depth look at the Newbery Award, addressing its purpose and place in the history of American literature for children, including practical guidance for library professionals serving youth and families in the public library and school settings who use Newbery books in their work.

- ALSC Mentoring Program - Applications for the ALSC Mentoring Program will open mid-September. The program seeks to match individuals with an interest in library service to children together for eight months. Throughout the eight months, matches are expected to connect at least once per month and work towards 2-3 SMART goals that help advance their skills and build familiarity of ALSC's Competencies for Librarians Serving Children.
- ALSC BIPOC Mentoring Membership Funding - To support the 2020-2023 ALSC Strategic Plan, and in light of the financial challenges brought by COVID-19, ALSC launched multiple membership funding opportunities for individuals who identify as Black, Indigenous, and/or a Person of Color. ALSC's latest membership funding opportunity is the BIPOC Mentoring Membership Funding Program. This funding program is geared towards recruiting and supporting a diverse pool of mentoring program participants. The objective is to diversify ALSC membership, while also diversifying librarianship and new cohorts of leaders in the field.

CHAPTER RELATIONS OFFICE (CRO)

Unit Manager: Michael Dowling

Budget Amount (Overall Revenue/Expense): \$177,834

of Staff: 1.5

Revenue Stream(s) the Unit Supports:

- Continuing Education
- Contributed Revenue
- Membership

Status Report on Pivot Strategy, Aligned Unit Goals:

Membership

CRO collaborated with MRS to create promotions for Student memberships, forwarding communications to all ALA accredited programs through faculty liaisons and student chapter leaders. CRO also continued administering payments

and memberships to ALA Chapters for joint-student membership. Student membership in the recent June report showed a slight decline, but overall student memberships have remained steady.

Continuing Education

CRO continues to partner with ODLOS on the delivery of EDI training sessions. In June and July, trainings were offered at the University of Oklahoma; in Dorchester County, MD; and at the Northeast Library District in Scranton, PA.

Contributed Revenue

CRO continues to receive support from Acton Family Giving and the Mellon Foundation to underwrite ALA's Covid-19 Library Relief Fund. Working with a nine-member review panel, CRO granted funding of between \$30-50k to thirty-four libraries that have experienced substantial economic hardship due to the coronavirus pandemic. The libraries selected represent four library types: tribal (3), public (14), school (10), and academic (7). CRO worked with CMO on managing the announcement process, and Accounting on distributing the \$1.25 million in grants in two weeks.

CRO is also co-representing ALA for the Communities for Immunities grant managed by IMLS which is providing support for ALA's time and resources dedicated to this effort.

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

- Concern that three large Chapters are now without Executive Directors for various reasons and with the challenges facing all Chapters during these unprecedented times. CRO is proactively reaching out to Chapters as they bring new staff or leadership on board, and contacting those who have had disruption to see what assistance can come from ALA.
- Revised and sent out State of the Chapter survey in August. The survey was planned to be done every two years but with the disruption caused by the pandemic, CRO did not conduct a survey in 2020. CRO will be analyzing the data for trends and asking if Chapters have an EDI committee or ongoing initiative.
- Working with ALA COVID Library Relief Fund grantees as they manage their grants and looking for innovative and impactful activities to highlight to funders and national media.

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

- 50 state chapters engaged through State of the Chapter survey and joint membership payments each month to 49 Chapters
- 235 libraries that applied for ALA Covid Library Relief Fund. Provided updates, and then potential ideas (ARPA funding, etc.) for libraries not selected.
- 34 library staffs that were selected as grantees

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

Engaged Chapters for final promotion of Annual Conference and updates on activities and issues through new use of Connect for Chapters. Application and review schedule adhered to with only minor delays which were relayed immediately to all applicants for ALA Covid Relief Fund. Very appreciative grant winners with lots of correspondence in getting their grants underway.

Describe the Most Impactful Unit Activities this Quarter:

- The ALA COVID Library Relief Fund provided much needed, large funding to 34 libraries in the U.S. and territories to keep serving their communities.
- Restarting State of the Chapter survey to provide updated base information for ALA's efforts with Chapters going forward in the Pivot Strategy.

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

- Working with data to help developing efforts with Chapters as part of the Pivot Strategy.
- Getting leaders from all Student Chapters connected and networking.
- Continued support of ODLOS EDI trainings.
- *Chapter Management Exchanges* on Student Engagement and EDI in Chapters.
- Communities for Immunities Second Round promotion to get more libraries to apply.

COMMUNICATIONS AND MARKETING OFFICE (CMO)

Unit Manager: Stephanie Hlywak

Budget Amount (Overall Revenue/Expense): \$600K

of Staff: 4 (with 2 openings)

Revenue Stream(s) the Unit Supports:

- Conference Services
- Contributed Revenue
- Membership

Status Report on Pivot Strategy, Aligned Unit Goals:

The Communications Cross Functional Team met for the first time to begin our work on our Pivot Strategy-aligned goals. Both major goals involve inventorying and assessing communications vehicles (email marketing, for example, as well as e-newsletters, blogs, and other forms of digital communication) and communications brands and styles in the hopes of optimizing ALA's external and member-facing communications to achieve our business goals.

- Goal: Ensure Conference Services (CS) meets or exceeds goal for paid conference attendance. CMO continues to work with CS on LLX marketing and communications strategies.
- Goal: Serve as business owner for Immediate Past President, Julius C. Jefferson Jr.'s presidential initiative around brand, with support from Membership and the Executive Office.
- Goal: Support new visibility campaign that positions both ALA and libraries as essential to increase awareness of ALA in the general public, attract new donors and supporters, and position ALA in a positive light for new and renewing members. This project is underwritten partially by Mellon funds.

The ALA Branding Workgroup roster has been finalized. Established by the ALA Executive Board in August 2021, the workgroup will consist of members, staff, and partners. The group will look into the opportunities beyond Libraries Transform to create an inclusive campaign including library workers and library lovers everywhere. The charge of the workgroup is to develop, review and recommend a new public awareness campaign, including investigation of a potential membership level geared toward the general public. Opportunities for members to engage in the process of the workgroup will occur throughout the year. We hope to meet in mid-October.

Describe the Most Impactful Unit Activities this Quarter:

I Love Libraries pageviews June 1 – August 31, 2021: 113,504

Interestingly, [this article](#) about a library's use of repurposed space had 13K pageviews. Though users didn't stay on the site for a significant amount of time or visit many other pages, the high volume of interest is worth noting.

These are the pageviews for stories created during the relevant period.

- [President Barack Obama calls libraries "citadels of knowledge and empathy"](#) 779 pageviews
- [Check out these librarian-approved digital experiences to keep your kids learning](#) 417 pageviews
- [Love a librarian? Nominate them for an I Love My Librarian Award!](#) 387 pageviews
- [This is the way to Check Out Books](#) 320 pageviews
- [Innovative library program gets kids active and fine-free in Buffalo, NY](#) 288 pageviews
- [Fresh librarian-approved kids' reads for summer 2021](#) 267 pageviews
- [Book Award Season Is in Full Swing for Librarians: Find Out How to WFH \(Watch from Home\)](#) 205 pageviews
- [Librarian swims to raise money for diversity initiatives](#) 137 pageviews
- [Librarian with early-stage dementia wins national award for facing adversity with integrity](#) 122 pageviews
- [Looking for great LGBTQIA+ books to read this summer?](#) 112 pageviews

ALA and I Love Libraries social media posts garnered 4,712,495 impressions, 89,483 engagements, and 42,053 link clicks.

Social media posts for ALA Annual garnered 2,783,077 impressions, 48,690 engagements, and 20,632 link clicks.

Digital marketing for ALA Annual

Feathr digital ads produced 851 conversions.

Ads reached 21,398 with more than 6,000 clicks.

CPA: \$9.90 with all costs (Feathr calculates at \$1.67 using only the cost of the ad buy)

ROI: \$143,904.00 if every conversion was \$179 (the advance rate). We could not capture granularity of admission types, for example students.

How that was calculated: $\$152,329$ (851 conversions x \$179) - $\$8424.96$ (platform access \$3000; implementation of first campaign \$4000; cost of ads \$1424.96)

Overall Media Snapshot for this Reporting Period

4,329 Articles/Mentions

4.6 Billion in Circulation

\$6.3 Million in Publicity value

Prominent Terms found in Media Coverage from June 1 – Aug. 31, 2021

Prominent Terms



Coverage Highlights

- **ALA Annual Conference**

During this reporting period CMO secured more than 1,114 Annual Conference mentions that reached more than 1.2 billion listeners, readers, and viewers across the globe, resulting in a publicity value of \$2.4 million.

The most covered Annual Conference event was the closing session featuring President Barack Obama with more than 600 clips, with a circulation rate of more than 1 billion and a publicity value of \$2.2 million.

CMO pitched the event to hundreds of media targets within print, radio, television, and library trade media resulting in earned coverage from MSNBC, CNN, ABC News, CBS Radio Network, and hundreds of news websites. A full analysis is available at https://bit.ly/ALA_ObamaCoverage, Password: ObamaSession.

- **Library Card Sign-up Month (September)**

During this reporting period, June 1 – August 31, more than 920 Library Card Sign-up Month clips were recovered. Thus far coverage has produced a circulation rate of more than 285 million and publicity value of and more than \$215 million.

CMO developed several media assets including a web press kit, member publicity tools and press materials. Thus far most Library Card Sign-up Month coverage has occurred at the local level and reflects messaging available within ALA member press release templates and other promotional materials.

Audio Public Service Announcements (PSAs) were recorded and edited by CMO. Media outreach efforts resulted in significantly earned placements, including Westwood One radio network, which picked up ALA's Library Card Sign-up Month audio PSAs featuring Phil Morehart, host of *American Libraries* podcast Call Number.

Westwood One radio network reaches 250 million people each week through 434 owned-and-operated stations in 89 US media markets (including eight of the Top 10), more than 7,300 broadcast radio affiliates and numerous digital channels! A complete analysis of Library Card Sign-up Month PSAs and other earned media will be included within the next Executive Board report.

Upcoming Events

- Library Card Sign-up Month, (September)
- 2020 Public Library Technology Survey, Sept. 1, 2021
- Banned Books Week, Sept. 26 – Oct. 2, 2021
- Carnegie Medals Short List Announcement, November 8, 2021
- I Love My Librarian Awards Event, Jan. 22, 2022
- Youth Media Award Announcements, Jan. 24, 2022
- LibLearnX, Jan. 21 – 24, 2022

CONFERENCE SERVICES

Unit Manager: Earla Jones

Budget Amount (Overall Revenue/Expense): \$1,064,878

of Staff: 5

Revenue Stream or Division:

- Conference Services

Status Report on Pivot Strategy, Aligned Unit Goals:

Goal 1: Meet revenue targets for Annual Conference FY21 and FY22 through expense management, sound budgeting, stronger communications and controls, goal setting and performance management. The areas of focus this quarter include:

- Enhanced marketing and engagement strategy
- Cross collaborations with CMO, Publishing and Membership
- Successful execution of the 2021 Virtual Annual Conference
- Securing facility contractual terms that protect ALA in the post-Covid landscape

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

- Activation of the LibLearnX Subcommittee of the ALA Conference Committee
- Collaborations with local constituents in San Antonio community for the kickoff year of LLX that highlight ALA values of diversity and inclusion
- Gathering data for the ALA leadership to re-evaluate hosting an in-person event in San Antonio, TX
- Securing future dates and locations for 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:

The 2021 Virtual Annual Conference Virtual closed with an attendance rate that met the target 100% and a financial performance that was 80% of the overall budget goal. While exhibit/sponsorship goals were exceeded, the overall gap

was not filled. Where students and non-members exceed projected participation numbers, member registrations are consistently below budget expectations.

of Members/non-members/other stakeholders reached during quarter (for all Units): *see Annual Conference metrics in section below*

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

The marketing and promotion strategy to engage the ALA member-public and constituents, continued this quarter, for the upcoming LibLearnX. CS and CMO worked to develop a series of talking points for both members and non-members. The promotion will be amplified around key dates which include, and not limited the Call for Presentations Closing, Education Sessions Announced, Theater Speaker Announcements, Registration Opening, and Advance Rate Ending.

Hashtag: #LibLearnX

Top reasons to attend 2022 LibLearnX:

- An ALA Member-based event, premiering January 2022
- Experience-based learning, to include engaging discussions, hands-on workshops, forum, idea exchanges, “bite-size” learning, and other specific formats to match your learning styles and objectives
- A conference designed to motivate, inspire, and engage in discussions that will shape the future of libraries and your library communities.
- Keynote speakers will consist of authors, thought leaders and celebrity speakers who can inspire action within the library professional community and expand on the central event theme and topical areas.
- Programming ideas and tips that will reflect field best practices, have clear learning objectives, and focus on applicable content, instructional design, and diverse audiences. Attendees can build schedules around varied subject areas, including Equity, Diversity & Inclusion, the Future of Libraries, Readers Advisory, Professional Development, and Human Resources.
- Connection, support, and high-impact learning for all library workers, in all types of libraries, at all career points.
- Education designed by library professionals for library professionals, focusing on similar needs, goals, and challenges.
- Participation in the event is guaranteed to strengthen your connections and knowledge, while also supporting the association that advocates for your industry and advances our shared mission.

Describe the Most Impactful Unit Activities this Quarter

1. ALA 2021 Annual Conference – Virtual -- <https://2021.alaannual.org/>

In June, Conference Services the ALA 2021 Annual Conference Virtual. The official dates were June 23-29, 2021. The conference program included:

- 130 On Demand Programs
 - 70 Discussion Groups
 - 5 On Demand Sessions
 - 9 Chair Programs
 - 17 President Programs
 - 16 News You Can Use
 - 14 Live Education Programs
 - 183 Other Live Events (including committee meetings, author events, networking, and social events)
-
- Accessibility Services included 663 captioned sessions, 33 of which included American Sign Language. Conference Services required staff to provide captioning for every session or meeting they submitted for the

Annual Conference. A guide of different resources to caption meetings was provided, whether it be auto captioning or live captioning.

- Event metrics captured by the event platform illustrated the following for featured sessions and daily views.

Featured Sessions

- **Exhibits Opening** – Amanda Gorman and Loren Long: 2,014 livestream, 1,003 on-demand views
- **Opening General Session** - Nikole Hannah-Jones: 2,492 livestream, 448 on-demand views
- **President's Program** – Isabel Wilkerson: 707 livestream, 238 on-demand views
- **Closing Session** – President Barack Obama: 3,326 livestream, 397 on-demand views

Daily Highlights

- **Wednesday:** Livestream: 3,647 unique participants; Livestream Peak Time: 3:00 PM CT – 2,493 participants (Vashti Harrison – Featured Speaker)
- **Thursday:** Livestream: 3,849 participants; Livestream Peak Time: 4:30 PM CT – 2,781 participants (Melissa de la Cruz – Featured Speaker)
- **Friday:** Livestream: 2,940 participants; Livestream Peak Time: 3:40 PM CT – 2,213 participants (Billie Jean King – Featured Speaker)
- **Saturday:** Livestream: 1,641 participants; Livestream Peak Time: 2:50 PM CT – 1,237 participants (Savala Nolan – Featured Speaker)
- **Sunday:** Livestream: 897 participants; Livestream Peak Time: 12:45 PM CT – 707 participants (President's Program – Isabel Wilkerson)
- **Monday:** Livestream: 1,029 participants; Livestream Peak Time: 2:24 PM CT – 681 participants (ENCORE Program: Managing Change: How to Lead in an Ever-changing World)
- **Tuesday:** Livestream: 3,579 participants; Livestream Peak Time: 12:45 PM CT – 3,326 participants (Closing Session – President Barack Obama)

Engagement Statistics

- User Accounts: 7,815 attendees have logged in 92,400 times
- Ribbons: 19,187 ribbons (4,927 attendees used 114 unique ribbon designs)
- Message Board: 166 messages (98 attendees received messages in 75 conversations)
- Schedule: 663 records (452,413 views and 186,583 favorites)
- Expo: 308 booths (179,054 views from 3,344 users and 15,188 favorites)
- Posters: 98 posters (10,156 views and 2,497 favorites)
- ARS Discussions: 11,946 comments (2,521 attendees)
- ARS Q&A: 124 questions (89 attendees asked questions and received 55 answers)
- Video Chats: 61 total video chats (56 attendees had video chat experiences totaling 86 hours of engagement)
- Live Streams: 6,137 attendees had live stream experiences totaling 70,578 hours of engagement

2. On June 15 – Conference Services, in conjunction with the LibLearnX Subcommittee, launched the call for presentations for the first LibLearnX: Library Learning Experience. The call was open until August 15. The event is scheduled for January of 2022.
3. On August 23 – Conference Services, in conjunction with the ALA Conference Committee, launched the call for presentations for the 2022 ALA Annual Conference. The call will be open until October 1. The event is scheduled for June of 2022.

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

In October 2021, Conference Services, with the support of CMO, will launch registration, marketing, and promotion for the new ALA event LibLearnX: The Library Learning Experience. The official dates are January 21-24, 2022 and will feature innovative and participatory education programs and highlights such as ALA Gives Back, Book & Media Awards, I Love My Librarian Award, LLX Marketplace: Exhibits and Ideas Xchange, LLX Studio, and the Youth Media Awards.

CORE

Division Executive Director: Kerry Ward

Budget Amount: \$1M

of Staff: 6

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

Core Board approved the following strategic goals to tie directly to the pivot strategy:

ALA Pivot Strategy Impact Stream: MEMBERSHIP

Core Strategy Area: Membership and Engagement

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

Core Values: Transparency; Sustainability; Inclusion

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

Core Values: Diversity; Inclusion; Collaboration

ALA Pivot Strategy Impact Stream: CONTINUING EDUCATION

Core Strategy Area: Continuing Education

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

Core Values: Knowledge Sharing; Innovation; Collaboration

Impact Stream(s): Membership, Continuing Education, Contributed Revenue

Community Impact: Equity, Diversity and Inclusion in Libraries and the LIS Workforce

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

Core is concluded its first strategic planning process at Annual. The [Strategic Action Plan: Members First](#) is based largely on the ALA Pivot Strategy. Our Leadership Team and Board, section leaders and volunteers, and member focus groups have all contributed to the plan. Related to the Pivot Strategy, Core will focus on providing member value and fulfilling the commitments we made to members when we asked them to vote for innovation, career development, and community in a new division.

The biggest unit concern is membership. Based on estimates, Core April membership is 5,210, in June. ALA estimated membership is below 50k, down 11% from this point in FY20. As with Core, it appears the membership decline is accelerating into fiscal year-end.

Core leaders recognized the need to reorganize their own divisions in order to create more value for members. We now strongly support that kind of innovation across ALA, via Forward Together (governance/organizational restructuring), the Pivot Plan (operational/goal alignment) and early discussions for a new operating agreement (financial alignment). These three projects are the blueprint for a more member-engaged, financially sound ALA. We view them as interlocking, so the failure of any one piece will doom transformational organizational change. In that event, ALA will likely lurch back into financial crisis, relying on endowment transfers, short term borrowing, disinvestment in IT, and staff cuts to finance the final decade of the association.

of Members: 5,210 estimate as of June 2021

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

Produced:

- 12 courses
- 16 webinars (a number were free as a service to the profession)
- 4 classrooms

Reaching approximately 2,000:

- 490 individuals
- 90 groups (representing many hundreds more participants)
- 1,395 students

We note that we are reaching a wide audience but are seeing lower than budgeted webinar revenue, and near budget revenue for courses

Describe the Most Impactful Unit Activities this Quarter:

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

1. Migrated **50 interest groups** that are up and running;
2. Implemented **6 sections**, any of which you can join, and put leadership teams for them in place;
3. Set up **31 committees at the division level** and are taking volunteers for both the current year and coming year that starts July 1;
4. Created the Core Involatron 3000 to **help you find your home and get involved in Core**;
5. Took nominations for **4 awards and 1 scholarship**, and those juries will be selecting recipients over the next 2 months;
6. Ran 13 courses and 20 webinars, including 2 free ones;
7. Implemented e-Forums (2-day, email-based discussion on specific topics) and ran **6 discussions**;
8. Started a **new education format called "classrooms"** that feature hands-on, interactive learning over 2-4 sessions;
9. Unified all our **events into a single calendar** and all of our **publications into a single catalog**;
10. Began selling some great **CoreWear that supports memberships for library workers in need**;
11. Expanded **the jobs site** to include more types of positions in collections, management, technical services, and technology.

Select Future Activities and Events Through End of Quarter:

External:

In response to the spread of the Delta variant, Core made the difficult decision to cancel our first planned face to face event, the Core Forum in Baltimore October 7-9, 2021.

DEVELOPMENT

Unit Manager: Tracie Hall/Anne Manly

Budget Goal: \$3.085M

of Staff: 3

Revenue Stream or Division:

- Contributed Revenue

Status Report on Pivot Strategy, Aligned Unit Goals:

Development strives to meet expectations pursuant to the Pivot Strategy through the following:

- Corporate and Foundation Giving;
- Individual Giving and Major Gifts;
- Support of other Pivot Strategy revenue streams, specifically Membership;
- Streamlined Gift Processing;
- Support of other ALA Unit's contributed income efforts;
- Campaigns such as the Annual Fund and long-standing programs such as Library Champions;
- Close involvement with ALA's Philanthropic Advisory Group;
- Corporate and Foundation giving remains Development's greatest area of strength. Executive Director Hall is working closely with Development to identify prospects, develop strategy, and codify Corporate and Foundation giving going forward through the coming fiscal year;
- Strengthening the Individual Giving and Major Gifts program is a major initiative of Development, and the office has adopted a "cost/benefit" strategy whereby the office seeks to identify initiatives which will produce the biggest benefit commiserate with available time and talent. ALA's purchase of the FreeWill software is an example of this approach. FreeWill is a software program which guides people through estate planning with build-in features that encourage participants to leave a bequest for ALA. FreeWill cost \$10,000 with one payment in FY21 and a second in FY22. ALA has already been named as a beneficiary of \$17,300 planned gifts, surpassing the cost of the program. In addition, Development is assisting, ALA President Wong, Executive Director Hall, and the Philanthropic Advisory Group in hosting a fall gathering to recognize and celebrate donors and community.

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

National trends relevant to the work of the Development Office include:

Rate of nonprofit sector jobs recovery slowed in August. After two consecutive months of robust gains, the recovery of nonprofit sector jobs slowed in August. The impact of COVID-19's delta variant was apparent in the August data, which showed a month-over-month increase of just forty-two thousand nonprofit sector jobs, or 6.9 percent of the jobs still lost as of July. The analysis also estimates that 65.2 percent of the 1.64 million nonprofit-sector jobs estimated to have been lost during the first three months of the pandemic had been recovered as of the end of August, but the rate of recovery has slowed.

Vanguard Charitable donors awarded \$1.7 billion in fiscal year 2021. Vanguard Charitable awarded grants totaling \$1.7 billion to more than fifty thousand charities through its donor-advised funds during the fiscal year that ended on June 30, a 9 percent year-over-year increase in giving. The increase was fueled in part by responses to racial injustice and inequality, pandemic and natural disaster relief and recovery, and giving in support of nonprofits impacted by a

contracting economy. To address pandemic relief and recovery, the organization's DAF account holders awarded more than 43,000 grants to human service organizations, including more than 13,000 to groups focused on homelessness relief. Other significant focus areas for donors included support for religious groups (nearly 33,000 grants), education (nearly 25,000 grants), and health (nearly 22,000 grants).

Gates Foundation report finds stark disparities in COVID-19 impacts. The COVID-19 pandemic has disproportionately impacted the most vulnerable populations. According to the report, the pandemic has exacerbated educational disparities, with early evidence suggesting that learning losses will be greatest among marginalized groups. Even in wealthy countries such as the United States, learning loss among Black and Latinx third-grade students was, on average, double that of white and Asian-American students, and learning loss among third graders in high-poverty schools was triple that of their peers in low-poverty schools. Women's employment globally is expected to remain thirteen million jobs below 2019 figures, while men's employment is largely expected to recover to pre-pandemic levels. With poverty reduction efforts stalled, nearly seven hundred million people are projected to be living in extreme poverty in 2030.

Nonprofit voter engagement boosted turnout for underrepresented voters. Nonprofit organizations' voter engagement efforts played a significant role in increasing turnout among underrepresented voters in the 2020 elections. Based on data from about twenty-five thousand of the seventy thousand eligible voters the effort reached in seven states, turnout rates were measurably higher among those historically underrepresented voters who were engaged by nonprofits than among comparable voters, including Asian-American and Pacific Islander (80 percent vs. 74 percent), Hispanic/Latinx (66 percent vs. 61 percent), young (63 percent vs. 58 percent), low-income (58 percent vs. 51 percent), and non-college-educated (72 percent vs. 68 percent) voters.

The study also found that nonprofit engagement among underrepresented voters helped close voter turnout gaps between and within racial/ethnic groups. Nonprofit-engaged Black voters with low-propensity voting histories had a 34 percent turnout rate, compared with 23 percent for other low-propensity Black voters and 33 percent for low-propensity white voters; low-income Latinx voters saw a 55 percent turnout rate, compared with 45 percent among other low-income Latinx voters and 55 percent among low-income white voters; and non-college-educated AAPI voters had a 75 percent turnout rate, compared with 68 percent among other non-college-educated AAPI voters and 79 percent among college-educated AAPI voters.

of Members/non-members/other stakeholders reached during quarter (for all Units): 350

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

The Development Office supported ALA President Patty Wong, ALA Executive Director Tracie Hall and ALA's Philanthropic Advisory Group in hosting a celebration of ALA's donors and stakeholders which attracted over 50 attendees. Donors, members of the Legacy Society, the 1876 Club, ALA's Executive Board, ALA's Endowment Trustees, ALA Unit Managers, and high Interest individuals received the following invitation:

Please join ALA President Patty Wong and ALA Executive Director Tracie Hall
and the ALA Community for our Fall Stewardship Gathering



The program surfaced greater interest in planned giving opportunities for supporting ALA's endowment and special programs.

Describe the Most Impactful Unit Activities this Quarter:

- During the final months of FY21, the Development Office worked closely with the Carnegie Corporation to secure funding for the Carnegie Medals for Excellence in Fiction and Non-Fiction, and the I Love My Librarian award. We are pleased to report that Carnegie funded the Medals program for FY22 and FY23. This was especially gratifying because Carnegie had not supported the Medals in FY21 and not only re-engaged their support of the Medals program but increased support to \$50,000 annually, a significant increase over past years. Similarly, Carnegie Corporation pledged its support for the I Love My Librarian until 2024 and increased its overall support to \$100,000 per year for FY23 and FY24. Development appreciates the work of Publishing, CMO and RUSA in helping to secure these funds.
- In August, the Development Office submitted its Interim Report to the Andrew W. Mellon Foundation concerning the \$2.5 million grant Mellon provided ALA in support of general operations. This grant supports the activities of 13 separate units across ALA. We were pleased that Mellon accepted the report without requesting further clarification or information.
- In June, the Development Office secured a donation of \$150,000 from Acton Family Giving.
- In addition, the Development Office submitted grant applications to Mazda Corporation and the NEA and supported other units in their efforts to secure support from funders such as Pokémon, Dollar General, IBM, Comcast, and AT&T.
- The Development Office also assisted the Chapter Relations Office in its administration of \$750,000 re-grant funds made available to libraries in need through the support of Mellon Foundation and Acton Family Giving.

- ALA Executive Director Tracie Hall lead negotiations with FreeWill to purchase their product, which guides individuals through estate planning. Executive Director Hall successfully negotiated the cost the of the product down from \$24,000 to \$10,000. To date, although not yet full launched across the association, ALA has received over \$50k in promised donations.
- The Development Office continues its work to unify Contributed Revenue efforts across the association, chiefly through its work as a “co-business owner” of the Contributed Income Pivot Strategy Revenue Stream, its work on the Cross Functional Grants and External Relations team and working with PPO to coordinate grants processes.
- In June, the Development Office hosted an appreciation event for the Library Champion cohort, featuring ALA President Julius Jefferson. We are pleased to report that the event was well attended and that despite the pandemic, the Library Champion program remains robust.
- Development continues to work closely with the Philanthropic Advisory Group to promote a culture of philanthropy across the association.
- In an effort to learn how to better increase donations from Donor Advised Funds, Development met with a fund manager and is working to upgrade its GuideStar rating.
- Finally, the Development Office continued its gift processing efforts, working closely with Finance and Accounting to close months and trouble shoot where necessary.

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

In the coming months, Development will:

- launch association-wide Annual Giving campaign;
- work with CMO to complete ALA’s Impact Report;
- improve ALA’s GuideStar rating;
- work with IT to implement the one-click donation site;
- begin renewal discussions with major funders;
- support PAG in its efforts to add new members;
- take part in the search for the new Director of Development;
- prospect and approach existing and new corporate and foundation funders;
- continue management of the Library Champions program;
- continue to lay the foundation for any future comprehensive fundraising efforts;
- improve Individual Giving and Major Gifts efforts; and
- continue to diligently process gifts.

FINANCE AND ACCOUNTING

Unit Manager: Denise Moritz

Budget Amount (Overall Expense): \$1,483,474

of Staff: 6

Revenue Stream(s) the Unit Supports:

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

Status Report on Pivot Strategy, Aligned Unit Goals:

- Streamline the close process: Beginning in FY 2021, the department moved to a quarterly reporting schedule. This will provide more efficiency in the close process. The quarterly reporting is also being adopted by the Membership Department for consistent practice across ALA.
- Cross-training: Due to our limited success with cross-training, we have hired a consultant for an Accounts Receivable project to accomplish the following objectives:

Phase 1 – Prepare detailed procedural documentation of each revenue stream, from initiation to recording in the general ledger and provide revisions to make the process more efficient and summarize in an Accounts Receivable Manual.

Phase 2 – Process transactions utilizing the procedural documentation prepared in Phase 1. Provide hands-on training for ALA staff, so that they understand the process and can then train other ALA Staff.

We continue to explore new ways of working to find a solution. Even through the remote work environment has proven to be a challenging training landscape, cross-training is critical for the full functioning of the department to reduce bottlenecks and make sure the work continues. This will also provide for continuous workflow when there is turnover amongst staff members and when there are unanticipated absences.

Our salary ranges for attracting talented staff are low and unfortunately, we have lost a proven valued temporary staff due to our inability to compete in the Chicagoland marketplace.

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

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

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

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

- Approximately 300

Describe the Most Impactful Unit Activities this Quarter

The department worked with the Small Business Administration to provide documentation to support forgiveness of the \$4,213,035 Paycheck Protection Program loan. The loan was forgiven in its entirety on July 2, 2021.

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

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

Select Future Activities and Events Through End of Next Fiscal Quarter

- Rebuilding the Finance and Accounting team

GOVERNANCE OFFICE

Unit Manager: Sheryl Reyes

Budget Amount: \$1.6M

of Staff: 4 Governance Staff; 3 Executive Office Staff

Revenue Stream(s) the Unit Supports:

- Membership

Status Report on Pivot Strategy, Aligned Unit Goals:

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

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

The next step is to brainstorm with the Affiliates on how we can facilitate a reciprocal relationship. The goal is to create stronger relationships, which in turn will help increase membership. President-elect Wong agreed to support this initiative and champion this effort. The first discussion with the Affiliates will occur sometime in the Fall 2021.

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

Preparations for the inaugural Virtual Volunteer Fair are underway and scheduled for Tuesday, September 14, 2021. Approximately 225 members registered for the event as of August 2021. The immediate goal is to bring awareness and visibility for members to have a fuller picture of the volunteer opportunities available at ALA. The long-term goal (via the pivot strategy) is to increase the member-leader pipeline by improving member identification, cultivation, engagement, recruitment, appointment, and volunteer life cycle. The next project is to improve the volunteer web presence on ALA.org and update the staff liaison handbook.

Goal #3: Evaluate and streamline programs managed by the Governance Office (Awards, Leadership Institute, etc.) to increase membership and/or revenue generation in FY22.

Program Assessment for the Governance Office is currently underway. For more than 5 years, the Leadership Institute has been a program managed by the Governance Office, as it originated from a presidential initiative. Internally, we have started transitioning the program to a more appropriate unit more aligned with the goals of the program – Core: Leadership, Infrastructure, Futures. Due to the pandemic, the 2021 in-person Leadership Institute was cancelled; and 2022 plans are currently in progress through Core.

The ALA General Awards are administered by the Governance Office and commonly referred to as [Recognition Awards](#). There are [hundreds of other Awards](#) offered through various [divisions](#), [offices](#) and [roundtables](#) throughout the organization. The development of an internal awards inventory survey for staff to complete is underway; shortly thereafter a cross functional team will convene to create a more manageable and sustainable awards program.

Another service the Governance Office manages is the ALA national elections. During the month of July, election vendors submitted proposals to partner with ALA to conduct the national election. A subgroup was formed to review the RFPs, assess functionality and price. The goal is to streamline processes and the member user experience.

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

- The start of a new committee term (2021-2022) began July 1, 2021, and board liaison assignments were finalized shortly thereafter. Staff liaisons are working on onboarding activities during this quarter of the fiscal year. More clarity and expectations were requested around the Board liaison role, which will be worked on as we continue to improve the program.
- The ALA Governance Office received feedback on communication and promotion of the Virtual Volunteer Fair. The Office is committed to improve communication of new initiatives and engagement opportunities. The communication plan will be reviewed and revised as we work on incorporating new membership-wide events.

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

Virtual Information Session and Membership Meeting, June 27, 2021

The joint session provided the opportunity for members to hear first-hand updates from ALA leaders and learn more about the governance of ALA. There were 321 unique viewers with an overall rating of 3.5 (out of 5.0 scale).

Virtual Council Meetings, June 28-29, 2021

ALA Council met virtually during Annual Conference 2021. There were 345 average unique viewers with an overall rating of 4.19 (out of 5.0 scale).

Other governance program evaluation ratings during Annual Conference:

- Joint BARC/F&A Meeting - 4.86 (out of 5.0 scale)
- ALA Executive Board Meetings - 4.8 (out of 5.0 scale)
- PBA/Division Leadership Meeting - 4.63 (out of 5.0 scale)

Virtual Inaugural Celebration, June 29, 2021

President Patricia “Patty” Wong began her term as the first Asian American to serve as president of the American Library Association (ALA). She shared her plans for leading the association and introduced the theme of her presidential year, “Libraries Connect”. The ALA Governance Office played an important role in planning and executing this event with 736 unique viewers. Special thanks to her advisory members, family, and friends for playing a critical role in this event.

Describe the Most Impactful Unit Activities this Quarter:

July/Annual Conference Governance Meetings

The Annual Conference meetings were held, which led to the following action from the two governing bodies, ALA Executive Board and ALA Council.

The ALA Executive Board Voted to:

- Approve the full list of companies from which ALA units can prospect for corporate partners, sponsors, and donors as listed on the December 31, 2020, Domini and TIAA CREF portfolios of “socially responsible” companies. EBD 6.2
- Extend the Operating Agreement Work Group charge through ALA Annual Conference 2022.
- Adopt the ALA Online Code of Conduct, which will apply to all online platforms used by ALA in a consistent and transparent manner as amended. The Amendment is to remove the following clause "Don't spam the community with paid products, events, services, or job posts. If you'd like to reach all ALA members and others in the profession with your career-related opportunities, you can use JobLIST career center or Core Jobs Service."
- Fund and support per (OIF/PPA CD #27)
- Direct Conference Services to deliver a report on implementation of the “Final Report of ALA’s conference accessibility task force 2017 CD#37.1” by October 2021. This report should include any implementation of the task force recommendations to date and present an action plan for continued implementation and review.
- Approve the Preliminary FY2020 Audit Reports as issued by Mueller & Co., LLP (CBD#29, 30, and 31).
- Approve the Philanthropy Advisory Group (PAG) appointments as recommended by the Finance and Audit Subcommittee (CBD#33).
- Approve that the Libraries Transform public awareness campaign will continue through at least August 31, 2022.
- Thank the Accreditation Working Group for their work and to not extend the timeline and direct Executive Director Hall to come back to the Executive Board with an interim update/recommendation by the Fall Board Meeting October 2021.
- Approve a two-year pilot on the updated ALA Election Timeline for the 2023 Spring Election as amended to keep the Nominating Committee timeline as is. Approve the Revised Campaigning Guidelines as amended to add meeting space for candidates during the January event.

ALA Council Voted to,

- APPROVED, that, with the exception of Items#1 (ALA Core Values) and #2 (Round Tables), all remaining items in the FTRWG report (ALA CD#46.1) be referred to a taskforce of a size, composition, mandate and reporting schedule to be determined by ALA’s President and subsequently confirmed by the ALA Executive Board.
- APPROVED, ALA CD#46.1, Item#1(ALA Core Values), the resolution on the ALA Core Values of Librarianship
- APPROVED, ALA CD#46.1, Item#2 (Roundtables), the resolution on the ALA Roundtables
- APPROVED, ALA CD#27.1, Motion #1-5, ALA Committee on Organization
 - expansion of the membership on the ALA Policy Monitoring Committee
 - expansion of the membership on the ALA Council Orientation Committee
 - creation of the ALA Code of Conduct Committee
 - disband the Committee on Membership Meetings.
 - add to the charge of the ALA Membership Committee.
- ADOPTED, ALA CD#53, the Resolution to Achieve Carbon Neutrality for ALA Conferences
- ADOPTED, the Memorials and Tributes by Council
- APPROVED, ALA CD 13.3, ALA Treasurer’s Report, the Annual Estimates of Income for FY 2022

- APPROVED, ALA CD #25, Constitution and Bylaws, adding language to the Constitution which clarifies that both Council and membership meetings may be held electronically and that voting through electronic means may take place at those meetings.
- ADOPTED, ALA CD#24.2, ALA Code of Ethics Ninth Principle
- ADOPTED, ALA CD#19.4 Resolution on U.S. Enterprises' Abridgement of Free Speech
- ADOPTED, ALA CD#19.7 Resolution in Support of Open Educational Resources
- DEFEATED, ALA CD#55 Resolution on Greater Transparency in the Library of Congress Subject Headings Revision Process
- REFERRED, ALA CD#56 Resolution on Replacing the Library of Congress Subject Heading Illegal Aliens Without Further Delay to the ALA Committee on Legislation for further analysis and report back to Council with recommendations at the January 2022 Council meeting.

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

Virtual Volunteer Fair

The inaugural Virtual Volunteer Fair was scheduled for September 14, 2021. This first-time engagement opportunity offered ALA members the opportunity to learn more about the different ALA volunteer opportunities.

Volunteer Application and Appointments

The deadline for members to submit their ALA and Council Committee volunteer applications was September 30, 2021. President-elect Pelayo-Lozada worked with committees and Governance staff in making appointments for the 2021-2022 committee year.

Fall Executive Board Meeting – October 29-31, 2021

The ALA Governance Staff is working on hosting the first in-person ALA Executive Board Fall Meeting in the new ALA headquarters, 225 N Michigan Chicago, IL. Staff is working on hotel, catering and meeting room accommodations while adhering to COVID related guidance.

Transforming ALA Governance Task Force (TAG)

The work of this task force will ramp up in the Fall as this group is scheduled to present during the January Council Meeting.

Election Vendor

A subgroup of Staff Election Administrators and Information Technology (IT) requested election vendor proposals to conduct ALA's national election. ALA plans to select the election vendor that best fits the needs of ALA.

Virtual Governance Schedules

The ALA Governance Office has recommended dates with member leaders for the upcoming Governance meetings for LibLearnX (January 2021 event) and Annual Conference (June 2022).

OFFICE FOR HUMAN RESOURCE DEVELOPMENT & RECRUITMENT (HRDR)

Unit Manager: Lorelle Swader, AED
Budget Amount: \$185,362
of Staff: 2 (1.5 FTE) (shared .40 staff with the ALA-APA)

Revenue Stream(s) the Unit Supports:

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

Status Report on Pivot Strategy, Aligned Unit Goals:

Unit Goal to increase Membership by 5%

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

Increase Revenue by 10% over Expenses

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

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

- Revenue for the JobLIST Placement Center is down due to not having a face-to-face conference for both Midwinter and Annual. This severely impairs the unit's ability to get the majority of its revenue.

of Members: NMRT (1,833)

of Members/non-members/other stakeholders reached during quarter (for all Units): Approximately 5,000 individuals.

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

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

- Emerging Leaders Program - The application for the Emerging Leaders program has closed. Sponsors are now reviewing applications. Once names are submitted, the general jury will complete the selection process to ensure a full cohort of participants. Program planning for the next cohort will begin soon.
- ALA-Wide Scholarship Clearinghouse – The application for this year's scholarships recently went live.
- ALA & Council Incoming Chair Strategic Leadership Meeting – On September 9, 2021, Eli Mina, ALA Parliamentarian conducted training for incoming chairs to discuss core principles of debate and decision-making tools to make meetings well focused, well-paced, and equally inclusive, and tips on how to address tough situations and controversies during meetings. He also demystified key issues with rules of order and to help them use them intelligently. (Sponsored by TOLD)
- ALA & Council Committee Chairs Orientation – On September 20, 2021, President Patty Wong met with incoming chairs to share her vision for the year. During this session, chairs received helpful information and reference materials to use during their year of service. (Sponsored by TOLD)
- Online Courses Offered June – October 2021

- **Budget & Finance**

To familiarize the student with the basic principles of library financial administration, including budgeting and planning within the mission and goals of the organization. Upon completion of the course the student will understand and be able to construct program, line item and capital budgets, understand the methodology involved in cost/benefit analysis, and be able to read/decipher library financial and auditing documents, and work with library accounting personnel. Topics include line item, program, and capital budgets, cost benefit analysis, capital projects, and fiduciary responsibilities of individuals and entities having responsibilities for financial administration in the library.

○ **Current Issues**

To familiarize participants about international, national, state, and local issues, trends, legislation, and demographics affecting their community and their staff. Featuring discussions on current library management issues, case studies, and assignments, in which students will apply what they have learned to their own library. By the end of the course, students will be able to identify and effectively respond to current issues or trends and those coming down the road that may affect public library management.

○ **Library Marketing**

To provide students with an introduction to basic marketing management and how these principles apply in a public library setting. Topics included are understanding marketing management, internal and external audits, analyzing marketing opportunities, developing marketing strategies, shaping the marketing product, and managing and delivering marketing programs. Upon completion of the course the individual is expected to know the key components of strategic marketing plans. The individual will be familiar with defining markets, adapting markets, building customer satisfaction, mission and vision statements, marketing research methodologies, environmental scanning, defining target markets and diverse patron populations, segmentation, implementation of services, public relations tools, and evaluating marketing and service results.

○ **Politics and Partnerships**

To provide students with the ability to identify social/political/economic issues that may affect the library, the populations it services, or its services. Students will be able to develop relationships with people who can exercise influence in federal, state, or local decisions. Understand the role of and work effectively with key constituents, the library board and library friends and/or foundation. Work effectively with the media. Lobby for federal, state, and local initiatives that support the library's vision, mission, and goals.

○ **Serving Diverse Communities**

The purpose of this course is to create a heightened awareness of the various segments of library populations and their diverse needs. The course engages demographics and needs assessments to develop skills to analyze, plan and implement services to meet the library community's diverse needs. With particular attention to multiculturalism, topics explored include programming, facilities, marketing, technology, collection development, and staffing and recruitment.

Describe the Most Impactful Unit Activities this Quarter

- Emerging Leaders Program Selections
- ALA-Wide Scholarship Clearinghouse application launch
- Support for NMRT online programs
- ALA & Council Committee Chair Orientation workshops
- Continuing Education Courses
- Co-supported the development of the monthly *Library Worklife E-Newsletter* (with ALA-APA)

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

Training of incoming ALA & Council Committee Associates

- Selection of the new class of Emerging Leaders
- Surveying all of the stakeholders (sponsors, participants, project hosts, member guides and staff liaisons) of the Emerging Leaders Program.
- Working with the Committee on Education (COE) to finalize the Core Competencies recommendations for Council.

INTERNATIONAL RELATIONS OFFICE

Unit Manager: Michael Dowling

Budget Amount: \$264,335

of Staff: 1.5

Revenue Stream(s) the Unit Supports:

- Conference Services
- Continuing Education
- Contributed Revenue
- Membership

Status Report on Pivot Strategy, Aligned Unit Goals

Conference Services

This June, 367 international librarians from and library workers from 47 countries registered for the Virtual Annual Conference, which was 4% of overall registration. Of that total, 55% were from Canada. The next largest group of attendees was from Singapore with 15%. The revenue from international registrations was \$58,360, which was 5.7% of the registration total. Pre-pandemic in-person conferences averaged around 500 international registrations with revenue about double what was brought in with the Virtual Conference. The Virtual Conference was advantageous for some international attendees, but many prefer to attend in-person if possible. Providing a hybrid option in 2022 would benefit international librarians who can't attend in-person. A number of international focused programs were held during conference with IRO managing the video development, including "African Libraries Resources: Access and Equity During Covid-19;" "Central American Library Successes in the Face of a Humanitarian Crisis;" and "Arab-American Writers: Great Reads to Diversify Your Collection."

Continuing Education

IRO hosted nine webinars during the last quarter of FY21, with a focus on sustainability and managing during the pandemic. ALA Task Force on United Nations 2030 Sustainable Development Goals presented, "Libraries Helping communities achieve development through the United Nations Sustainable Development Goals" in June. A three-part series on *Linked Data* was promoted to international librarians. This was followed post Annual with a IRRT series on responding in times of COVID. Presentations included "Libraries Adapting to the COVID World"; "Opening a digital door to our campus users and libraries' community during global COVID-19 epidemiology outbreak"; and "Insta-Library: Connecting to Youth Through Instagram during COVID Times." Webinars averaged 140 registrants.

Contributed Revenue

Changes in staffing at the State Department's American Spaces program during the summer did not allow for continued conversation. IRO and Development will reconnect in the fall with new staff and await announcement of grant opportunity to train librarians around the world who staff American Spaces.

Membership

International membership continued to dip at a similar rate to overall membership during the quarter. At the end of August there were 1,489 members from 90 countries outside the United States. Membership engagement and recruitment will be a key focus of the new International 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

- Declining international memberships continues to be a major concern.
- Continued debrief and looking at strategies for election success under the new IFLA governance structure
- New North American Regional Division of IFLA with Immediate Past President Julius C. Jefferson, Jr. as Chair
- Setting up the programming for the 8th Sharjah International Library Conference and first National Libraries Summit

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

- 1,623 international members and non-members attended Annual conference and nine webinars.
- 2,500 members and non-members reached in promotion of Sharjah International Library Conference and Guadalajara Book Fair.

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

- Annual Conference allowed international members to engage in largest library event of the year, while webinars provided insight from ALA on major issues facing libraries today, libraries and librarian response to Covid and how to create sustainable activities.
- ALA's efforts in Sharjah and the Guadalajara Book Fair show that ALA is providing opportunities for librarians and ALA experience outside the U.S. and reinforces ALA's commitment to diversity of collections.

Describe the Most Impactful Unit Activities this Quarter:

- International registration at Annual came close to stretch goal of 400 and revenue just about reached target of \$60,000
- Creation and announcement of National Libraries Summit to be addition to Sharjah International Library Conference
- Providing support for all international programming that took place as part of Annual

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

- Organizing and hosting the Sharjah International Library Conference and the National Libraries Summit
- Standing up International Cross Functional Team
- ALA-FIL Free Pass to Guadalajara Book Fair
- Supporting new North American Regional Division of IFLA

INFORMATION TECHNOLOGY

Unit Manager: Sherri Vanyek

Budget Amount: \$3,162,709

of Staff: 7 (1 vacancy)

Revenue Stream(s) the Unit Supports:

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

Status Report on Pivot Strategy, Aligned Unit Goals:

Update on Goal 1: Upgrading Shibboleth (Single Sign-On software) to the latest version. In order for the two main ala.org websites to be configured for https we needed a Shibboleth upgrade to be performed by our Shibboleth consultants. I'm happy to report we have an upgraded version running in our production environment and have successfully upgraded ALA Connect and the new Continuing Education software to use the upgraded version of the Shibboleth Single Sign-On software. We are now upgrading the remaining sites with each unit's software implementation.

Background Information:

Description: Upgrade Shibboleth Single Sign-On software to latest version

Deliverables:

Completed - Remove blocker on turning https on the main ala.org website servers

Completed - Work with ALA Connect vendor to update Single Sign-on

Completed - Work with Continuing Education vendor to add Single Sign-on

Not Completed - Work with the Election vendor to add Single Sign-on

Not Completed - Work with Booklist vendor to add Single Sign-on

Not Completed – Work is underway to remove a blocker from the iMIS upgrade project set to begin in October 2021

Update on Goal 2: Install https on the main ala.org website servers.

Completed in June 2021

Update on Goal 3: Monitor revenue and membership goals.

No further progress has been made on this goal. We are waiting on cross functional teams to meet this fall to help define the requirements for more dashboards to be created.

Background Information:

Description:

Build dashboards to monitor major Association-wide goals in the Pivot Plan and associated key performance indicators.

Deliverables:

Identify baseline dates and numbers

Create dashboards to be able to monitor progress

Update on Goal 4: Assist with the new Continuing Education (CE) Learning Management/eCommerce System Implementations. This project is on schedule to launch in September 2021 due to needed testing and extra time needed by the content creators for training and creating the actual content in the new system.

Background Information:

Description:

Implement and integrate a new CE Learning Management/eCommerce System in conjunction with a cross functional team.

Deliverables:

Completed - Assist with the selection of a new system

Ongoing - Assist with the implementation

Completed - Set up and test integrations

Ongoing - Provide training

Update on Goal 5: Implement the eStore/eCommerce shopping cart integration to the new fulfillment vendor.

The eStore/eCommerce shopping cart integration was completed on July 1, 2021.

Background Information:

Description: Work with the new fulfillment vendor to set up the integration to the eStore/eCommerce System

Deliverables:

Completed - Fulfillment vendor is able to process orders from the eStore/eCommerce system

Update on Goal 6: Update Technology to Advance Membership Communications. The migration of the blogs to the cloud is underway. The Sympa list serve has been retired and replaced with ALA Connect. The Informz email marketing account merger has taken place and IT is working with the Informz stakeholders to use the newly merged account. The remaining projects are scheduled to be completed in the fall of 2021.

Background Information:

Description: Improve Membership communications by updating the technology

Deliverables:

Ongoing by unit - Complete Blogs Migration to the Cloud

Completed - Sympa list serve migration to ALA Connect

Ongoing Training by unit - Informz (Marketing Automation Service) merger is complete.

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

- Our current IT staff of seven is focused on keeping operations going and project execution as time allows based on priority. Given the resource constraints, the IT department is working diligently to decrease our technology debt. Replacing outdated technology will require investment, time, and additional resources. To address this, IT has requested additional investment dollars in FY2022 to hire a Chief Information Technology Officer and to

fund project work to reduce the technology debt. IT is still searching for a Systems Software Specialist to support project execution. These resources are needed to meet the association's major goals for FY2022.

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

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

Describe the Most Impactful Unit Activities this Quarter:

- Completed the eStore shopping cart integration with the new fulfillment company.
- Assisted with the integration and launch of the new Continuing Education website at <https://elearning.ala.org>.
- Implemented Multi-factor Authentication on O365 applications to improve our security posture and save money on Cyber Security Insurance.

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

IT has been working on the following projects:

- Upgrading the Shibboleth Single Sign-on Service Providers on the remaining twelve websites (ALA Connect and the Continuing Education websites have been upgraded).
- Monitoring revenue and membership goals.
- Assisting with the new Continuing Education (CE) learning management/eCommerce implementations.
- Improving communication technologies (i.e., migrating all blogs to the cloud and providing stakeholder training on the email marketing automation services).
- Begin work on the iMIS Association Management System upgrade (membership database) in October 2021.
- Begin work on the iMIS database cleanup project in November 2021.
- IT will continue to work on the projects outlined above and complete the roll out of new VPN software. The VPN software will be used by staff for accessing many of our systems remotely.

MEMBER RELATIONS & SERVICES

Revenue Stream/Division Manager: Melissa Walling

Budget Amount (Overall Revenue/Expense): Revenue - \$3,750,268, Expense (\$689,386) and Net Revenue \$3,060,882

of Staff: 8.5

Revenue Streams Supported:

- Conference Services
- Membership

Status Report on Pivot Strategy, Aligned Unit Goals:

The MRS unit has three goals that support the pivot strategy:

- Increase membership to 56,000
- Increase student membership to 9,000
- Increase ALA membership in coordination with ALA Chapters and National Associations of Librarians of Color

Membership has remained at a decline when compared to previous years and dipped below 50,000 this quarter. The final numbers for ALA membership for FY21 are projected to be 48,000-49,000.

Activity this quarter focused primarily on membership engagement and building our plan to activate for growth starting in September. We focused on foundational activities that will prepare us for growth such as the activating the membership onboarding project, continuing the membership model work, working to ensure our members have functioning dues receipts (ongoing), and updating our membership renewal communications. These projects are essential to a quality member experience.

After the conclusion of Annual Conference, we shifted our focus to building our plan for FY22 and achieving the expected membership growth in the pivot plan. This included the following key activities:

- Onboarding our newest MRS employees including Judy Czarnik and Donna Mangrum who are focused on key membership areas including recruitment and growth, member journeys and reconciliation of member accounts.
- Reviewing data and trends to distill our key growth areas for FY22 to focus our resources towards the areas of biggest impact.
- Engaging key stakeholders in conversations about membership growth including division and round table staff.

MRS staff is actively involved in the Learning Management System launch and has worked extensively this quarter to support the new CE unit and internal stakeholders during this transition.

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

The Marketing General Inc, annual Membership Marketing Benchmarking Report reported that a total of 47% of membership associations reported a decline in membership this past year. This decline however was coupled with innovation as many associations found ways to engage their community in new ways. In the membership area, we activated the ALA Connect Live series and virtual member meet ups which are two examples of this type of innovation. At ALA this engagement was generated through virtual programs across the entire association which likely created relationships with new customers and potential members.

As mentioned in my January 2021 report, the pandemic created opportunities for membership and many associations pivoted, as we did, to providing information to the entire industry – not only members. This “Open Garden” approach instead of a “Walled Garden” approach resulted in high number of individuals engaging with our online learning, our content and our COVID recovery website. This was a great way to build affinity for the organization without requiring a financial investment on behalf of the attendee/customer. **The challenge facing ALA now is - how do we convert all these individuals within the “Open Garden” into members and ultimately drive revenue for the association.**

ALA and the membership team will work to drive membership growth through engaging with some of these new individuals. The engagement curve (January 2021 report) gives us a model to consider as we work to foster relationships with these individuals and push them to take the next step in their relationship with us. Encouraging them to attend, purchase, donate, advocate – and ultimately become a member. Operationalizing membership recruitment is a key focus area.

Membership Turnaround:

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

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

In reviewing data from recent years only, our reinstatement numbers are down significantly. That is likely a result of virtual conferences with lower participation than in person conferences. We will prioritize a win back and a reinstatement campaign to lapsed members over the last 3 years.

Accounting Downstream Impact:

Continuing from last quarter, the impact of the escalated accounting closes had a significant impact on the MRS team. In addition to the volume of the work required, the quick turnaround times and expectations significantly increased our overtime expenses this quarter and resulted in the MRS falling behind in our ongoing responsibilities to members and customers. The team remained focused and understood the important of this work to our members and to our fellow staff. While this was a challenge, we remained in regular conversations with our staff partners across the organization and our internal customers and I'm proud of the work the entire ALA team accomplished in getting our processes back on track.

of Members/non-members/other stakeholders reached during quarter (for all Units): All 50,000 members and all ALA Annual Conference Attendees

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

Based on June official statistics, ALA's membership decreased 0.5% to 49,660. This is a 10% decline from 2020 and an 12% decline when compared to the same time in 2019. This time of year, our membership counts typically decline so we are going to face additional decline until early Fall.

This quarter remained challenging for membership as our efforts remained focused on accounting deadlines and payment application and staff was taking the furlough and their well-earned vacation. We resumed monthly e-renewals but only mailed one print notification this quarter. We have a strong plan for renewals starting in FY22 and will be activating our new renewal messaging in FY22 as well.

Division memberships currently total 40,343 which is a slight decrease from last month and in alignment with our ALA membership trend. With some divisions resuming in-person conferences, and with Fall virtual programming we expect these numbers to rebound per usual trends.

Round table memberships currently total 17,735 which is a slight decrease from last month and in alignment with our ALA membership trend.

Describe the Most Impactful Unit Activities this Quarter:

Membership Engagement

A virtual Annual Conference created an opportunity for our unit to host virtual member meet ups. The Committee on Membership hosted an all member meet up and the Student Chapters hosted a student member meet up. The virtual ALA Lounge had 1,622 views and our Showcase items had 336 views and 42 clicks. We featured 20 resources, campaigns, and tools in our Showcase from across the association – most viewed: Baby Yoda Library Cards (65), Conference At Home (36), JobLIST (25) / Jason Reynolds, BBW 2021 Chair (25).

The [Conference At Home](#) was a new engagement initiative and anecdotally it was well received. This featured President Jefferson's playlist, downloadable conference ribbons and a social media pet parade.

MRS also coordinated ALA's virtual booth at the 11th National Conference of African American Libraries hosted by BCALA.

Membership Onboarding

An exciting project we concluded work on this quarter is the membership onboarding project. This is project we are working on in conjunction with CMO and was launched in August 2021. As noted in the annual Marketing General Membership Marketing Benchmarking Report, “78% of associations that have seen a renewal rate increase in the past year have also had a tactical plan to increase engagement.” Without a successful onboarding strategy for new members, it is difficult to secure a members’ affinity for the organization and ensure a membership renewal. This work is being done through an investment by OverDrive.

The campaign is a year-long series of 13 messages each highlighting a key benefit of ALA membership. The goal is to introduce ALA in digestible amounts and greater detail to promote participation and engagement. The campaign will be reviewed monthly to assess member response and revise communication if appropriate. In addition to the emails, we created a **New Member Center**: <http://www.ala.org/membership/new-member-center>

Membership Staff

MRS is an area of the organization that has been impacted by efforts to contain association spending; however, we are so appreciative of being included in the Mellon Grant. We have hired a Membership Marketing & Engagement Manager, Judy Czarnik, and selected a Membership AR Specialist, Donna Mangrum, in the third quarter and both staff have completed their onboarding and training program. Each staff member has shown great potential to positively impact this work during this important time for ALA membership.

Learning Management System

MRS not only provides service to external customers, but also provides service internally. One of these areas is supporting e-learning events hosted by divisions and offices by providing registration services and customer support. The CE unit has worked very closely with MRS staff to ensure that the new LMS will be able to support events across the organization. We have participated in testing and training and are looking forward to the launch. We also supported the ALA e-learning events when the contract with PBD ceased and the LMS was not ready to launch.

RDA Billing Support

As part of our internal services, MRS also supports billing of subscription products including RDA. Processing of RDA payments made through Digital River is a highly manual process as the system is not integrated with iMiS and requires product look ups and offers purchases followed by refunds. This work fell behind early in the pandemic and the team focused on getting this caught up for FY21. We have also brainstormed with RDA staff about potential improvements to the payment processor that would minimize manual efforts on behalf of our team.

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

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

- **Membership Model** – A simplified personal membership model will be presented to the board this October for implementation in FY24. A pricing survey was distributed this week to help inform the price of the Professional membership.
- **Lapsed Member Win Back Campaign** – Membership renewals have not been following a normal pattern during the pandemic and our members have sometimes been working in disparate locations. We are activating both a lapsed member and a win back campaign to reclaim members who did not renew their membership. This will be primarily a digital campaign, but we hope to include a print tactic as well.
- **Conferences** – MRS will coordinate ALA’s presence at AASL, and we have worked to integrate this with the AASL membership experience. This will be a significant step forward for us to present a unified ALA brand and our first in-person conference in some time. We will also be working closely to support messages to non-members to join ALA to attend LLX, a member only event.

- **Member Renewals** – We will finally be activating our new member renewal messaging focused on both the ROI messaging as well as the impact of ALA’s work through membership dollars. This messaging will address the question of “What’s In It For Me” with my ALA membership.

OFFICE FOR ACCREDITATION

Unit Manager: Karen O’Brien

Budget Amount: \$149,726

of Staff: 2

Revenue Stream(s) the Unit Supports:

- Continuing Education

Status Report on Pivot Strategy, Aligned Unit Goals:

- Ensure manageable expansion of available ALA-accredited degree programs:

Managing fee revenue generating programs in Candidacy for Initial ALA accredited status Old Dominion (visit this fall) and University College London (UK) with a visit in Spring 2024 and in Precandidacy status: University of Central Missouri and Middle Tennessee State.

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

School librarian preparation programs, like Middle Tennessee State and Old Dominion, have built out curriculum offerings and applied for ALA accreditation (a revenue source) to bypass CAEP accreditation.

- Report trends and statistical data including enrollment, completions, and student diversity.
- Published [report](#) [Excel] and collecting latest data for CoA inspection at its April Meeting.
- Increased annual fee by 5% in FY22 to support ALA’s goals of managing expenses and increasing overall revenue.
- Revising [Standards](#) [PDF] to reflect the state of the expanding field, ALAs core values, and the urgency. to broaden equity, diversity, and inclusion in LIS education and libraries. The CoA Subcommittee on Standards Review has developed a Standards review plan.
- Working in collaboration with the ALA Council Committee on Education on its revision of the Core Competencies.

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

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

of Members/non-members/other stakeholders reached during quarter (for all Units): 415

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

Sixty individuals attended the annual general reviewer training that included members, non-member (archivists, etc.), and LIS program representatives.

Describe the Most Impactful Unit Activities this Quarter:

The training as above and closure of the virtual review of the program at the University of Pittsburgh

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

PITTSBURGH, UNIVERSITY OF

Degree program(s) accredited by the American Library Association

Master of Library and Information Science (Next Review: 2028)

Accreditation granted June 25, 2021, with follow-up reporting due on March 1, 2022, on Standards I.1 (program’s mission and goals pursued through implementation of an ongoing, broad-based, systematic planning process), I.1.1 (continuous review and revision of the program’s vision, mission, goals, objectives, and student learning outcomes), I.1.2 (assessment of attainment of program goals, program objectives, and student learning outcomes), I.1.3 (improvements to the program based on analysis of assessment data), I.1.4 (communication of planning policies and processes to program constituents), I.5 (program has explicit, documented evidence of its ongoing decision-making processes and the data to substantiate the evaluation of the program’s success in achieving its mission, goals and objectives), I.6 (program demonstrates how the results of the evaluation are systematically used to improve the program and to plan for the future), II.6 (documented evidence to substantiate evaluation of curriculum), III.1 (faculty capable of accomplishing program objectives), III.3 (policies to recruit and retain faculty from diverse backgrounds), III.6 (faculty with diversity of backgrounds and skills and an intellectual environment that enhances the accomplishment of program objectives), III.7 (faculty assignments relate to the needs of the program and to the competencies of individual faculty members), and IV.2 (current, accurate, and easily accessible information about the program is available to students and the general public).

Web: <http://www.sci.pitt.edu/academics/masters/mlis/>

Student Achievement data: [Click here to view Achievement](#)

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

- November edition of the semi-annual Office newsletter *Prism*.
- Committee on Accreditation Fall Meeting for orienting new members, reviewing Special Reports, and planning.

OFFICE FOR DIVERSITY, LITERACY AND OUTREACH SERVICES (ODLOS)

Unit Manager: Kevin Strowder

Budget Amount (Overall Revenue/Expense): (-\$415,646) Net Revenue Over Expenses

of Staff: 5

Revenue Stream(s) the Unit Supports:

- Conference Services – Primarily through our work with ALA member groups and with the NALCos and outreach affiliates, ABOS and ARSL, leading up to and during conference
- Continuing Education – Reflected in operating budget
- Contributed Revenue – Reflected in operating and project budgets, primarily Spectrum

- Membership – Our work with member groups and the profession at large supports both member recruitment and retention
- Publishing - ODLOS staff drafted language for the August Publishing promotion, highlighting select titles that centered on equity, diversity, and inclusion topics. ODLOS staff also consulted with Publishing staff on upcoming book titles and content.

Status Report on Pivot Strategy, Aligned Unit Goals:

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

ALA and the National Associations of Librarians of Color (NALCos) started meeting quarterly in September 2020 and, after a break over the summer, are scheduled to meet September 21, 2021. The NALCos are involved in the groundwork for the study and will have representation on the Advisory Committee.

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

In working toward this goal, we are both meeting the demand for equity, diversity and inclusion trainings for library audiences and continuing to identify key impact stories from those trainings. In June and July, Kristin Lahurd (ODLOS) and Mariel Colbert (CRO) facilitated seven trainings for four library systems or institutions.

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

This goal is in its early stages. ODLOS staff met with MRS Director Melissa Walling and CRO Director Michael Dowling in August to discuss the pilot project. We have also contributed to a summary to be shared with prospective partners.

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

September 2021:

In the last quarter, ODLOS responded to the need for developing professional EDISJ resources. Our Committee on Diversity and the Committee on Education supported this action. The Committee on Diversity created the [Diversity, Equity, and Inclusion \(DEI\) Scorecard for Library and Information Organizations](#). The DEI Scorecard promotes accountability and transparency in gauging institutional performance on five measures of DEI: Embeddedness of DEI into the Culture and Climate of the Organization; Training and Education; Recruitment, Hiring, Retention, and Promotion; Budget Priorities for DEI; and Data Practices. This Scorecard was informed by ALA’s Core Values of Librarianship, ACRL Diversity Standards: Cultural Competency for Academic Libraries, and other report card/scorecard measures of DEI performance.

The Committee on Education worked to [update ALA’s Core Competences](#) of Librarianship (ALACCs) This iteration incorporates concepts of social justice, equity, diversity, and inclusion throughout all aspects. It includes essential knowledge and skills for library professionals to create and support library collections, services, personnel, facilities, and programs that foster equitable access and engagement with its resources. Embedding social justice throughout the competences demonstrates collaboration, while having a separate social justice competence also recognizes that it contains unique attributes over and above the other competences.

Additionally, ODLOS is responding to the desire for greater reach, visibility, and independence among our member groups.

[CSK Round Table Process Update](#)

The Coretta Scott King Book Awards began the process to become a Round Table during the ALA Midwinter Conference. This is in response to CSK leadership and Community members voting to create a task force between CSK and EMIERT representation to work on the overall process. After 52 years of operating under SRRT and EMIERT, CSK is ready to move forward with cementing itself as an independent group in the ALA Book Awards Community.

During FY21, the Task Force discussed CSK history, their relationship with EMIERT, and the vision of CSK Round Table status. The result of the task force was for CSK to move toward becoming a Round Table with support of EMIERT leadership.

Next steps include:

- Recommendations from the Task Force Leader shared with CSK Executive Board in the September 2021 Meeting
- CSK Executive to discuss the E-petition in late September - early October
- CSK Executive Board to vote on final version of the E-Petition in October 2021 Meeting
- Task Force to submit the E-petition along with signatures to move forward with the Round Table status process before December
- CSK celebrates (if approved) new status as a Round Table at their Annual Breakfast at ALA Annual in Washington D.C. in June 2022

Bridging Deaf Cultures

In June, Alice Hagemeyer assumed responsibility as a leader of Bridge Deaf Cultures (BDC), an interest group of ODLOS. She requested support from the National Association of the Deaf (NAD), and affiliates of the nation for her planned agenda for the year 2021/2022. BDC has 120 active ALA members who have a special interest in deaf issues.

The plan is to grow BDC membership by the end of 2022. ODLOS intends to connect with participants of the first DEAF FORUM, last January 24, 2020, co-hosted by ASGCLA (now defunct) and FOLDA. This is in addition to those who don't have access, like library associates and authors of deaf cultural books. We hope NAD and its affiliates spread the word about the BDC agenda between July 2021 and June 2022.

- Creating the ALA Toolkit tentatively called Deaf Culture: Libraries Connect
- "Deaf Forum" activities at the next ALA annual conference 2022 (suggested program topics, speakers, items for the toolkit, presenters, resources, publicity, etc.)

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

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

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

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

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

- Monica Chapman attended BCALA's National Conference for African American Librarians. She networked and shared information about the Office's work as well as how to get involved with the Coretta Scott King Book Awards.
- The Social Responsibilities Round Table (SRRT) celebrated its second annual "Afternoon of Social Justice" virtually on July 8th, 2021. There were three panels in total for the event: "Racial Justice/Social Responsibilities", "Focusing on Youth Homelessness: Lived Experiences and Insights" and an encore showing of the Chair's program at ALA Annual "Martin Luther King, Jr. Holiday Multi-Cultural Idea Exchange".
- ODLOS facilitated virtual equity, diversity, and inclusion trainings for library institutions across the country.

- In partnership with the International Relations Office and the Mortensen Center at the University of Illinois Urbana-Champaign Library, ODLOS marked [World Refugee Day](#) with a [webinar](#) on June 18 on “Library Services to Refugees during the COVID-19 Pandemic.”
- At ALA Annual Virtual ODLOS coordinated several events, including:
 - The [Coretta Scott King Book Awards 52nd annual awards ceremony](#)
 - The [Stonewall Book Awards Ceremony](#)
 - The 2021 Jean E. Coleman Library Lecture, “[Mirroring Community in the Library: Growing Momentum for Tribal Libraries and Tribal Librarianship](#),” presented by Aaron LaFromboise
 - Discussion Groups hosted by the [Committee on Literacy](#), the [Library Services for Dementia/Alzheimer’s Interest Group](#) and the [Library Services to the Justice-Involved Interest Group](#)
 - Forums hosted by the [Committee on Education](#), [EDI Assembly](#), and [Cultural Proficiencies for Racial Equity Task Force](#)

Describe the Most Impactful Unit Activities this Quarter:

In partnership with Chapter Relations, ODLOS continues to respond to the demand for equity, diversity and inclusion trainings for library systems and organizations. We facilitated the following virtual trainings, reaching more than 300 participants:

- “Uncovering Privilege and Addressing Microaggressions” - Whatcom County Library System (WA)
- “Cultural Competence”, part of virtual institute “Developing Responsive Library Leaders” - University of Oklahoma School of Library and Information Studies
- “Implicit Bias” and “Privilege” - Dorchester County Library System (MD)
- “EDI Elements” series of three trainings on “Cultural Competence,” “Implicit Bias,” and “Microaggressions” - Northeast Library District (PA)

In June, ODLOS coordinated two sessions with the Council Orientation Committee on Microaggressions. For over 100 ALA Councilors, facilitator Alanna Aiko Moore presented on microaggressions, their impact and strategies for intervening. Participants engaged in breakout conversations using scenarios prompts, followed by a group debrief.

Aaron LaFromboise was selected as the 2021 Jean E. Coleman Library Outreach Lecturer. Dr. Jean E. Coleman was the first director of the Office for Literacy and Outreach Services (OLOS), now the Office for Diversity, Literacy and Outreach Services (ODLOS). This lecture series is tribute to her work to ensure all citizens, particularly Native Americans and adult learners, have access to quality library services. The lecture series teaches library professionals about their role in providing equity of access. Aaron was chosen due to her impressive work with the Blackfeet Tribal community. During her lecture, Aaron outlined her professional journey and the negative effect of white librarians in a tribal community. Aaron challenged folks to acknowledge the needs of tribal people while advocating for tribal library workers to serve their communities.

The 2021 Spectrum Scholarship Program received four times as many applications as scholarships available, with majority of the applicants deemed highly fundable. A committee of 28 jurors selected Scholars based on their commitment to community building, leadership potential, and planned contributions to making social justice part of the LIS field. [This year, 60 Scholars were selected for the 2021-2022 academic year](#). Finally, in July ODLOS received notification from IMLS of funding for the four-year project, Spectrum Doctoral Fellowship Program: Catalysts for Change. With co-Project Director Dr. Nicole A. Cooke, ODLOS will recruit 8-10 racially and ethnically diverse doctoral students focused on advancing racial equity and social justice in LIS curricula. The project will build capacity and cooperation amongst partnering LIS degree programs to expand social justice curricula and increase support for BIPOC doctoral students and faculty in LIS.

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

The Spectrum Advisory Committee is meeting in late September to discuss upcoming virtual opportunities for the 2021 cohort. Planned activities include Twitter chats and a recruitment webinar for the next cycle of applications.

The Spectrum Virtual Institute is currently scheduled for September 29th. Since the eighty (80) 2020-2021 Scholars didn't meet in person at the ALA Annual conference in Chicago, ODLOS staff is hosting a virtual event including a happy hour social with Spectrum alumni.

ALA's Serving Refugees, Immigrants, and Displaced Persons (SRIDP) subcommittee plans to release a new toolkit centered on libraries serving multicultural populations.

Amber Hayes will be attending the Association of Bookmobile and Outreach Services (ABOS) virtual conference in October. She will exhibit and network with outreach library workers and attend sessions to further the Office's relationship with ABOS.

Kristin Lahurd (ODLOS) and Mariel Colbert (CRO) will continue to facilitate virtual equity, diversity, and inclusion trainings for library systems, including a consortium of seven academic libraries in Rhode Island and Massachusetts.

OFFICE FOR INTELLECTUAL FREEDOM (OIF)

Unit Manager: Deborah Caldwell-Stone

Budget Amount: \$359,538

Of Staff: 2, with 2 vacant positions

Revenue Stream(s) the Unit Supports:

- Continuing Education
- Contributed Revenue
- Membership
- Publishing

Status Report on Pivot Strategy Aligned Unit Goals

The Office for Intellectual Freedom continues to evaluate its ongoing initiatives for effectiveness and value, seeking to improve or eliminate existing initiatives and identify opportunities for new initiatives that will better serve member needs.

For some time, OIF has maintained a separate WordPress site for its Choose Privacy project, a legacy grant initiative intended to educate library workers and library users about the importance of privacy rights and to provide a home base for advocacy and activities associated with Choose Privacy Week. Due to low member engagement and public interest, OIF staff concluded that it should end active support for Choose Privacy Week and the website itself. OIF staff are now working with member leaders on the IFC Privacy Subcommittee to incorporate the resources housed on the Choose Privacy website into the issues and advocacy area of the ALA website so that all resources addressing user privacy can be found in one location. This closure will allow OIF staff to save money and redirect resources other initiatives that better serve member needs and interests.

OIF also worked cooperatively with Production Services to identify production cost savings for the *Journal of Intellectual Freedom and Privacy*, which serves ALA members and libraries by providing crucial information and detailed reports about contemporary censorship challenges in libraries while providing a venue for commentary and research related to intellectual freedom, privacy, and social justice.

Opportunities and Challenges

The Office for Intellectual Freedom continues to address an unprecedented number of challenges and controversies arising from the ongoing campaign by conservative advocacy groups to suppress and censor books and resources that

are anti-racist, address the United States' history of racism and slavery, or reflect the lived experiences of Black, Indigenous, and persons of color. Some challenges verge on the ludicrous, such as the Katy, TX school district's decision to "pause" a presentation by author Jerry Craft because a group of parents believe that his Newbery Award winning middle-grade book *New Kid* promotes "critical race theory." Other efforts are specifically targeting works associated with Nicole Hannah-Jones' *1619 Project* and a range of works by Dr. Ibrahim X. Kendi.

A parallel effort by some of the same organizations targets books and resources reflecting the experiences and concerns of LGBTQIA+ persons or non-fiction works addressing human reproduction and sex education, such as Robie Harris' *It's Perfectly Normal*. The effort to ban and remove LGBTQIA+ materials from public libraries' youth collections has adopted extreme tactics, such as targeting library staff for social media harassment. In Campbell County, Wyoming, a group seeking to remove LGBTQIA books from the library have filed a criminal complaint with the local sheriff, claiming that the challenged books are obscene.

The Office for Intellectual Freedom is shifting time and resources to support the library workers, educators, authors, and others fighting these censorship attempts, and continues to work with other offices and divisions to leverage ALA resources to provide additional aid. OIF staff is also using these challenges as an opportunity to amplify ALA's messaging in support of intellectual freedom, social justice, and equity, diversity, and inclusion.

Member Outreach and Engagement (07/01/21 – 09/30/21):

- Intellectual Freedom News: 2,398 primary subscribers reached weekly
- Intellectual Freedom Blog: 819 subscribers; 47 posts; total views: 81,920
- Committees, Roundtable, and Working Group Meetings: 260 members
- Challenge Support: 138 emails, phone calls and Zoom consultations

- Intellectual Freedom Round Table (IFRT) Activities
 - Problematic Titles and You: Inclusive Collections, Hot Topics, and Intellectual Freedom - Chair's program at Annual Conference 2021
 - Challenges & Crises: Preparing Your Board of Trustees - Co-sponsored with United for Libraries at Annual Conference 2021
 - Intellectual Freedom Awards Celebration on June 24, 2021

- Public Challenges (6/1/21 – 09/30/21)
 - 155 Cases
 - Direct support provided in 120 cases
 - 90 Books, 11 Programs, 30 Other Challenges (Displays, Reading Lists, First Amendment Audits)
 - Notable Challenges:
 - Central York School District (PA): Year-long "freeze" on 300 books, articles and documentaries created by primarily BIPOC authors recommended for use as part of the schools' diversity curriculum.
 - The Elmbrook School District (WI): The district administration suspended the books "Queer" and "This Book Is Gay" from its middle school libraries and Sora app after receiving a demand for removal from a conservative legal organization.
 - Campbell County Public Library, WY: A local church's pastor filed a criminal complaint against the library and its staff, claiming that several books in the library's young adult and children's collection addressing LGBTQIA themes and sexual health are obscene and inappropriate for minors.

- Social Media
 - Twitter: From June 1 - September 30, tweets from the ALA Office for Intellectual Freedom Twitter profiles garnered 324,394 impressions, 5,761 engagements and 1,209 post links, with a gain of

171 net followers. The top three tweets during this period were focused on the popular and national Banned Books Week event, with the top post being OIF's [kickoff tweet](#) for the week.

- Facebook: From June 1 through September 30, OIF's Facebook pages attracted 987,949 impressions, 56,403 engagements and 13,972 post link clicks, with significant growth in engagement over the past quarter. The increased engagement reflects social media activities associated with Banned Books Week, including multiple livestreams of author events.

Additional Advocacy, Education and Outreach:

- Director Deborah Caldwell-Stone
 - "Freedom of the Press, Assembly, and Speech: First Amendment Issues Today," ALA Virtual Annual Conference, 6/25/21 (Sponsored by the Intellectual Freedom Committee)
 - Collection Development Policy Training, Staff and Trustee In-Service, Grand Marais Public Library, 7/28/21
 - "Banned: How Censorship Impacts the First Amendment," Carnegie-Pittsburgh Public Library, 8/19/21
 - "Advocating in Advance: Keeping Ahead of Legislation and Local Initiatives," with PPA's Megan Cusick, United for Libraries 2021 Virtual Conference, August 2021
- Assistant Director Kristin Pekoll
 - "2020 Censorship by the Numbers," on-demand "News You Can Use" session, ALA's Virtual Annual Conference
 - Long Island Library Pride Alliance 9/14/21
 - AASL Affinity Group 9/15/21
- Summer E-course "The First Amendment and Library Service," taught by Theresa Chmara, general counsel for the Freedom to Read Foundation, August 2 – 28, 2021 (co-sponsored by Continuing Education unit and the Freedom to Read Foundation.)
- Banned Books Twitter Chat with author, Jason Reynolds, August 2, 2021
- Publication of *A History of ALA Policy on Intellectual Freedom, A Supplement to the 10th Edition of the Intellectual Freedom Manual*, September 14, 2021

OIF's Most Impactful Unit Activities this Quarter

The Office for Intellectual Freedom worked with representatives from the Intellectual Freedom Committee, Public Policy and Advocacy, and the Office for Diversity, Literacy and Outreach Services to draft a position statement addressing ongoing efforts to censor books and materials addressing racism, Black American History, and diversity. The ALA Executive Board approved the [ALA Statement on Censorship of Information Addressing Racial Injustice, Black American History, and Diversity Education](#) on August 18, 2021.

ALA's and OIF's 2021 observance of Banned Books Week created several opportunities for OIF staff to advocate against the ongoing campaign to censor and suppress books and resources addressing racism, the history of slavery in the United States, and books written by authors who are Black, Indigenous, or persons of color and promote ALA's commitment to protecting the freedom to read. Highlights include an article about student efforts to fight a school board ban on diverse resources in York, Pennsylvania that included commentary by Deborah Caldwell-Stone and featured ALA's statement on critical race theory, as well as extended print and audio coverage of ALA's intellectual freedom initiatives by National Public Radio and NPR local affiliates.

- [High school activists get controversial book ban reversed in Pennsylvania: 'They are heroes'](#) Yahoo Life
- [During Banned Books Week, Readers Explore What It Means to Challenge Texts](#), NPR National
- [Libraries: Strongholds of the First Amendment](#), South Dakota Public Radio
- [Calls to Ban Books by Black Authors Are Increasing Amid Critical Race Theory Debates](#), Education Week

Future Activities and Events

- Director Deborah Caldwell-Stone and Assistant Director Kristin Pekoll will attend and present at the AASL Conference in Salt Lake City, Utah.

PUBLIC LIBRARY ASSOCIATION (PLA)

Division Executive Director: Mary Davis Fournier

Budget Amount (Overall Revenue/Expense): FY 21 Budget: \$771,600 revenue/\$1,280,002 expense.
May 21 Actuals: \$592,329/\$660,960

of Staff: 13

Status Report on Pivot Strategy, Aligned Unit Goals:

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

Goal 1: Increase PLA Membership by 2%

Goal 2: Increase PLA CE revenue by 2%

As of the May 3rd quarter financial report, PLA membership dues continued to trend ahead of budget. For Q3, PLA is 36% over budget, realizing dues revenue of \$395,762, against budget of \$387,200. We do continue to see year-over-year declines, likely due to the pandemic. We anticipate a clearer picture by end of FY21, as membership processing catches up from the MRS March-May pause on renewals.

PLA continues to see positive financial results from its ongoing webinars and Family Engagement virtual training.

PLA's CE revenue is generated through paid webinars and virtual learning series:

- Paid Webinars have generated \$55,621 in revenue against budgeted revenue of \$37,500.
- Live professional development activities were optimistically budgeted for FY21, and they will not be held. These include space planning, Equity Starts with Us, and Project Outcome trainings. Since these events are not being held, expenses have been minimal, and two virtual programs have helped generate missing revenue for PLA:
 - The new EDISJ Leadership Lab series, offered virtually, generated about \$42,765 in revenue, nearly hitting the revenue target for the live EDISJ trainings, which was \$50,000. Due to lower expenses, however, the net stands at \$30,219, which is double the budgeted net of \$15,172.
 - The Advancing Family Engagement virtual classroom series is exactly on target for FY21, with \$18,600 in revenue from its second cohort.

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

PLA continues to focus on how the field is responding to two main trends: re-opening and recovering as the pandemic situation improves; and the increased opportunity for federal dollars.

1. As libraries expand re-opening and figure out how to operate going forward, PLA is paying close attention to activity on the ground. Right now, libraries are in various states of openness, with some fully re-opened and others observing limited in-building service. PLA will continue to listen to the advice of member-leaders as we work to offer the most relevant and timely support. In anticipation of questions around re-opening policies and procedures, PLA hosted a legal issues forum at ALA Annual Conference. PLA also launched a free webinar series:

Public Libraries: Partners in Workforce Development, which showcases the work public libraries are doing to meet the needs of job seekers.

2. PLA is also closely monitoring the impact of COVID on local budgets. Some libraries are seeing cuts, particularly to professional development and travel lines. This impacts members' ability to engage with PLA. To continue to meet members where they are, PLA is working to expand online learning opportunities, including an enhanced virtual conference experience for PLA2022.
3. Challenges to library collections and programs are on the rise in response to unfounded concerns about Critical Race Theory. PLA is providing background support to the good work of our colleagues in OIF and PPA in countering these challenges.

of Members (for Divisions): 7,524 (as of May 2021)

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

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

PLA membership declined slightly again but is still trending ahead of budgeted membership revenues. The PLA conference website just went live, and we anticipate seeing an uptick in membership when registration opens early in FY22.

The Inclusive Internship Initiative ran a fourth cohort over this summer. 44 high school interns from diverse backgrounds completed paid, mentored internships in their local libraries. Each mentor-intern pair attended a virtual kick-off hosted by PLA, completed a community-facing project over the summer, and met as a group for a virtual wrap-up in September. Although the program was a bit different this year due to the ongoing pandemic, it was still a great success. III is funded by a LB21 grant from IMLS.

In September, PLA launched the third cohort of the Advancing Family Engagement virtual classroom series, attracting 99 registrants for a gross of \$27,800. PLA plans to run a fourth cohort of this popular series in mid-2022.

Additional engagements include:

- 3 paid webinars, totaling \$15,480 in revenue
- 5 free webinars, including the first three of a six-part series focusing on work force development
- Participation in ALA's Volunteer Fair

Describe the Most Impactful Unit Activities this Quarter:

The [2020 PLA Library Technology Survey](#) report was released, detailing how libraries are further extending their technology services and resources in the face of pandemic limitations. The report provides the most current and complete picture of how public libraries serve as digital equity hubs

Ninety-nine session proposals were selected by the PLA Conference Programs subcommittee for the [PLA 2022 National Conference](#) from a highly competitive pool of nearly 500 submissions. Registration for our March in-person conference in Portland, Oregon opened during the last week in September. is live and open until June 21, 2022.

Onboarded three new board members and successfully transitioned Mary Davis Fournier into her role as PLA ED.

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

During the next fiscal quarter, PLA will

- Launch registration and promotions for the 2022 PLA National Conference: plan for our in-person conference and myriad contingencies.

- Offer two additional [paid webinars](#)
- Promote the new release of PLA's latest title, "Strategic Planning for Public Libraries," which addresses the key areas of strategic planning that public library professionals care about most. This instructional publication provides a framework that libraries of all sizes can use as a basis for their strategic planning. The content is supported by research conducted across more than 200 public library professionals and in-depth interviews with more than 20 library directors and leaders throughout the country.
- Orient new committee, task force and advisory members.

PUBLIC POLICY AND ADVOCACY (PPA)

Unit Manager: Kathi Kromer

Budget Amount: \$2,572,405

of Staff: 12 FTE, 2 part-time

Revenue Stream(s) the Unit Supports:

- Membership

Status Report on Pivot Strategy, Aligned Unit Goals:

The Public Policy and Advocacy office (PPA) continues to contribute to ALA's membership goal. In addition to mobilizing library advocates to gain congressional support for the Build America's Libraries Act (BALA), PPA has produced and promoted resources that will enable ALA members to access billions of dollars in non-IMLS funding through the Emergency Connectivity Fund.

Also, in alignment with the ALA pivot strategy for increasing meaningful membership engagement opportunities, PPA has created new resources, provided professional development opportunities, and expanded communication with ALA members and divisions to broaden their advocacy skills. ALA members are also increasing their policy and advocacy engagement on social media, particularly related to the Build America's Libraries Act.

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

A major focus of PPA has been on the FCC's new programs to provide broadband access, Emergency Connectivity Fund (ECF) program for libraries and schools, which was authorized by ARPA in March 2021. While PPA is in the process of rolling out resources to facilitate library use of the new FCC programs, we will monitor, provide input and advocate for several additional legislative vehicles and opportunities related to access to information.

Congressional negotiations on an infrastructure package failed to include funding for library facilities as envisioned in the [Build America's Libraries Act](#). ALA has mounted an aggressive PR and advocacy campaign to generate support for libraries as critical national infrastructure and will continue efforts to gain cosponsors for the Build America's Libraries Act through the month of September, when the budget reconciliation bill is expected to be finalized by the Senate.

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 social media, advocacy alerts and emails
- In mid-June, Megan Cusick conducted Advocacy Academy for the leadership of the Library and Information Association of Jamaica.
- Libraries Build Business Instagram Live series of interviews with program director Megan Janicke and staff from three grantee libraries: Ferguson Municipal Public Library (Sept.), Independence Public Library (Aug.) and Richland Public Library (July).
- In July, Megan Cusick met with member leaders of the Arkansas Library Association to explore opportunities for a newly launched member community of interest.
- In July, Kevin Maher, Deputy Director of Government Relations, and Jil Staszewski, Assistant Director of Advocacy Communications, participated in the Committee for Education Funding's (CEF) virtual Hill day. Along with other members of the committee, PPA staff met with the offices of several congressional leaders in support of increases in federal education funding.
- In July, Shawnda Hines presented ALA's legislative agenda alongside other library advocacy groups for the National Archives and Records Administration.
- Megan Cusick presented "*National Issues, Local Impact*" at the National Conference of African American Librarians.
- Alan Inouye spoke the Maryland Library Association's [MLA Conversations Series](#) in July, "Episode 54 on Ebooks and Public Policy."
- Marijke Visser led a [Q/A session](#) on applying for the Emergency Connectivity Fund (ECF), which featured five library professionals and special remarks by acting FCC Chair Jessica Rosenworcel.
- Marijke Visser presented on the ECF to Association of Educational Services Agencies at their annual conference in Washington, D.C.
- In August, Alan Inouye moderated a panel at [Digipalooza 21](#), "Digital Access for All: How Government Investments for Libraries and Schools in 2021 are Succeeding."
- In collaboration with the Office for Intellectual Freedom, Megan Cusick presented [Advocating in Advance: Keeping Ahead of Legislation and Local Initiatives](#) at the United for Libraries conference in August.
 - In August, Shawnda Hines presented on a Public Affairs Council webinar [Coordinating Government Relations and Communications](#).
 - In September, Shawnda Hines presented to the COSLA PR Marketing and Communications Interest Group on ALA resources and partnership opportunities.
 - Monthly presentations by Kathi Kromer for ALA Connect Live.
 - Scores of posts on PPA (@LibraryPolicy), ALA and ALA division (incl. AASL, ACRL, PLA, UFL, ILL) social media accounts and blogs.
- Library advocates (distinct from ALA members) via emails through ALA's advocacy center and multiple daily posts on social media
- Media via press releases and direct outreach resulting in interviews with library trade and other media (in addition to dozens of op-eds described below), as well as a virtual press briefing in July on the Build America's Libraries Act featuring Rep. Andy Levin (D-MI-09), ALA President Patty Wong and COL member Ed Garcia
- Scores of virtual meetings by PPA staff and advocates with Members of Congress and congressional staff

Describe the Most Impactful Unit Activities this Quarter:

- Developed and heavily promoted new resources to assist ALA chapters and local libraries in accessing funding for through the [Emergency Connectivity Fund](#), established as part of [the American Rescue Plan Act](#). Led an Instagram Live [Q/A session](#) on applying for the Emergency Connectivity Fund, which featured five library professionals and special remarks by acting FCC Chair Jessica Rosenworcel.
- Coordinated closely with advocates around the country to generate and place dozens of Tweets aimed at members of Congress and [op-eds on the Build America's Libraries Act](#)

- [Launched *Connectivity Corner*, a series of conversations on Instagram Live with library practitioners and ALA President Patty Wong on libraries, broadband and digital equity. The first in the series featured Chris Martinez, IT Director for Harris County \(Texas\) Public Library.](#)
- Partnered with [Communities for Immunity](#), a collaboration among libraries and museums to boost COVID-19 information and vaccine confidence in communities across the nation. The [partnership](#) provides dedicated funding for library applicants to develop evidence-driven materials, resources, programs, and approaches specifically designed to help engage diverse audiences in vaccine confidence. PPA has encouraged libraries to review the partnership’s website, eligibility requirements and apply for funding. The first application window was open from August 5 through September 2, 2021.

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

- **Build America’s Libraries Act (BALA):** PPA will continue advocacy highlighting libraries as national infrastructure and gaining cosponsors for BALA, as congressional negotiations on a budget reconciliation package are expected to continue into the summer.
- **#FundLibraries FY 2022:** PPA will focus advocacy efforts on appropriations committees to ensure robust funding for IMLS will benefit library services and maintain level funding for the Innovative Approaches to Literacy program. On July 15, the appropriations bill was approved by the House Appropriations Committee. The Library Services and Technology Act (LSTA), administered by the Institute of Museum and Library Services, saw an increase of \$9 million, \$1 million above President Biden’s request and raising a total of \$206.5 million for the nation’s primary source of federal funding for libraries. The increase for LSTA, if it holds in the final bill, would be the eighth-consecutive increase for libraries. Innovative Approaches to Literacy (IAL), a program designed to support effective school library literacy initiatives, saw a \$3 million increase, making for a total \$31 million for the Department of Education program.
- **Emergency Connectivity Fund (ECF):** PPA, along with the E-rate Task Force, will continue to support libraries that choose to apply for funding for the Emergency Connectivity Fund when the second 15-day application window opens later in September. These resources are housed on ALA’s website and updated regularly as additional information becomes available.
- **eBook support for states:** PPA will continue to provide policy advice, [legal counsel](#), and communications advocacy assistance as appropriate to chapters working toward state legislation on library access to digital content, such as in Maryland (legislation went into law), New York (legislation passed), Rhode Island (legislation introduced) and Massachusetts (legislation introduced)
- **Communities for Immunity:** PPA will continue to promote the funding opportunity as the second application window (October 4-29, 2021) approaches.

PUBLIC PROGRAMS OFFICE (PPO)

Interim Unit Manager: Melanie Welch/Formerly -- Deb Robertson (Retired 10/8/2021)

Budget Amount: \$289,271

of Staff: 8 (6.5 of whom are supported by grant projects)

Revenue Stream or Division:

- Contributed Revenue

Status Report on Pivot Strategy, Aligned Unit Goals:

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

GOAL #1: Support ALA revenue goals in FY22 by developing new/strengthening existing strategies to monetize PPO's position as ALA's main grantmaking unit

GOAL #2: Increase PPO earned and grant revenue in FY22 by 10%.

PPO has been awarded four grants in recent months, providing more than \$200,000 in overhead to ALA's General Funds over the lives of the projects.

- NEH awarded \$2.2 million in American Rescue Plan: Humanities Grantmaking funding for post-pandemic support of libraries of all types. PPO will distribute 200 grants of \$10,000 to support libraries' humanities efforts. The 14-month budget includes \$41,030 in overhead (the \$2 million in pass-through grants are not eligible for overhead), and also budgets for the purchase of 200 copies of the ALA Editions book *"Going Virtual: Programs and Insights from a Time of Crisis,"* which will be sent to grant recipients.
- NEH awarded PPO \$500,000 in staff salary through the American Rescue Plan: Humanities Organizations funding opportunity, a federal rescue grant designed to fund organizations impacted by the coronavirus pandemic. The funds will pay 44% for all PPO staff salaries, including General Fund positions, for 12 months, and includes \$93,758 in overhead.
- IMLS awarded \$498,805 for the second phase of ALA's National Impact of Library Public Programs Assessment (NILPPA), a multiphase effort to conduct foundational research documenting and illuminating the potential of library public programs to fortify libraries, strengthen communities, and improve lives. Phase 2 seeks to advance the library field's understanding of library programming by exploring program impact and partnerships. The 36-month budget includes \$57,245 in overhead.
- The Library of Congress awarded \$84,028 to fund the development of library programming resources based on the LOC's digital women's suffrage collections. The 12-month budget includes \$10,960 in overhead.

At the Q3 close for FY21, PPO is better than budget in the General Fund due to NEH CARES funding; we project a \$50,000+ savings in General Fund salaries by the close of the fiscal year. PPO grants revenue and indirect cost recovery are behind budget due to timing; we expect to be on-budget by year end.

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

- The greatest challenge facing PPO at this moment is staffing. However, there is a plan to address this underway. As described above, PPO has seen an influx of new grant-funded work recently, in addition to the nine other grant programs and exhibitions already in progress at libraries throughout the country. This workload is becoming increasingly challenging as we are short two FTEs due to the departure of two longtime PPO staff members earlier this year. In early September, HR approved a search process for two additional PPO program coordinators (both grant-funded), which will significantly ease the staffing burden. We look forward to hiring and onboarding those individuals in the coming months.

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

As of Sept. 10, PPO is managing 724 library grants nationwide.

PPO's [ProgrammingLibrarian.org](https://www.programminglibrarian.org) website had 24,662 unique users in August, 21,106 in July, and 20,571 in June. This is roughly on par with previous months.

Membership in the [Programming Librarian Facebook group](#) has grown to 21,420 members on September 7, up from 20,851 in June. (This is a private group; members submit request and answer the brief membership questions to join.)

Describe the Most Impactful Unit Activities this Quarter:

- PPO announced a new grant for libraries designed to spark conversations about American history and culture through an examination of the women’s suffrage movement. Through [Let’s Talk About It \(LTAI\): Women’s Suffrage](#), participants will read a series of books curated by humanities scholars and discuss the people and events from this often under-taught part of U.S. history. Twenty-five libraries will be selected to receive a \$1,000 stipend to support programming costs, ten copies of five themed books, access to programming guides and support materials, virtual training on the LTAI model, a suite of online resources, and more. Applications will be accepted from September 1 to December 1. Library workers can apply online at [ala.org/ltai](#).
- PPO invited library workers to apply for the [Libraries Transforming Communities \(LTC\): Focus on Small and Rural Libraries grant](#). Up to 100 libraries will be awarded in this round of grantmaking, part of ALA’s longtime community engagement initiative. Library workers may apply online for grant funding by September 16 at [ala.org/LTC](#). Participating libraries will receive training in how to lead conversations, a skill vital to 21st-century librarianship. Library workers will complete a [free ALA e-course](#) on basic facilitation skills; host at least one conversation with community members on a chosen topic; and receive \$3,000 to support community engagement efforts. Grant funds may cover a range of expenses, including staff time and collections and technology purchases. Over 500 public, academic, school, and tribal libraries representing 48 U.S. states have been awarded in the past year. [View the full list](#).

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

- Announce recipients of Round 3, Libraries Transforming Communities: Focus on Small and Rural Libraries (100 libraries)
- Announce recipients of NASA @ My Library (60 libraries)
- Accept applications for Let’s Talk About It: Women’s Suffrage (25 libraries)
- Begin research as part of the National Impact of Library Public Programs Assessment (NILPPA) Phase 2
- Prepare for upcoming application periods for the Peggy Barber Tribute Grant and Libraries Transform Communities Engagement Grant, both opening December 1

ALA PUBLISHING (ALA GRAPHICS, ALA EDITIONS/ALA NEAL SCHUMAN, AMERICAN LIBRARIES, BOOKLIST, ELEARNING SOLUTIONS, DIGITAL REFERENCE-RDA, PRODUCTION SERVICES)

Department Manager: Mary Mackay

Budget Amount: \$10,072,632/ Overhead: \$2,669,246/ Net \$416,153

of Staff: 50

Revenue Stream Supported:

- Publishing

Status Report on Pivot Strategy Aligned Work:

Effective 9/1/21, the department is renamed ALA Publishing & Media, reflecting general trends and areas of work as well as Pivot Strategy imperatives.

ALA Publishing's individual units continued to lay groundwork for the FY22 goals shared with all staff in March 2021, focusing in Q4 both on striving to close gaps in FY21 revenue goals while containing expenses, and also on ensuring that published content and initiatives support the imperative of increasing EDI engagement and amplifying "Let Our Legacy Be Justice." All are preparing for FY22 priorities and investments with implementation of the ALA Pivot Strategy and cross-functional teams in mind. Key performance indicators for ALA Publishing units related to the Pivot Strategy will reflect what we have traditionally measured—revenue/ expenses/ overhead/ net revenue—with KPIs expanded accordingly in FY22.

Describe the major issues, trends, opportunities, or concerns that your unit has or is responding to at the closing of this fiscal quarter Q4 FY21:

Effective 9/1/21, the department is renamed ALA Publishing & Media, reflecting general trends and areas of work as well as Pivot Strategy imperatives. The ALA Pivot Strategy continues to offer a framework to help us respond to trends and market conditions. The demand for content that supports library workers, LIS instructors, and organizations in making progress in EDI initiatives continues to grow. Units across the department are responding to this imperative according to the type of product their unit produces, and the specific markets served, as ALA's recent EDISJ inventory highlights.

The post-pandemic environment is showing signs of stabilizing, if more slowly than projected, with ongoing budget and funding uncertainties among our customers and the unexpected surge of the Delta variant resulting in some continuation in unpredictable market and sales trends. Print advertising, subscriptions, and product sales are especially impacted. Renewals to print subscriptions slowed as libraries trim them from their budgets; they have adapted to using digital resources and also became accustomed to free content opened up as a service during the pandemic. Recapturing subscribers remains an important focus.

Booklist and *American Libraries* are working with advertisers on delivering custom content, now a value-added expectation. This new normal has become an increasingly resource-intensive requirement, given the very specific and targeted interests of the advertisers that include white papers and new digital products. Editors and production staff have had to become more engaged in an area that used to be more limited to marketing, which requires careful rethinking of editorial content to free up the necessary resources. Products such as the new *Booklist Reader* and podcasts offer related opportunities going forward.

The move from PBD in Atlanta to ALA's new vendor(s) for product fulfillment, warehousing, and distribution, Chicago Distribution Center, and the intake of stock spilled from Q4 into Q1 of FY22. Operations there started on July 1, and the stock is now all received, and we look forward to new opportunities afforded by the move. The move resulted in lower product sales (books, posters, bookmarks) sales for longer than anticipated, due especially to an ongoing shopping cart integration issue uncovered only after the move, and slow truck shipments that delayed receiving in Chicago. The team is working with IT on the integration as a high priority. The move overall has demanded significant staff time and focus in Q4. The release of backorders will have a positive impact in Q1 FY22.

A global shortage of paper pulp is causing major disruption to the publishing industry with delays of up to 12 weeks in getting paper from suppliers; these supply-and-demand disruptions are resulting in longer-than-usual print times, likely to continue affecting all units except RDA and Graphics in Q1/Q2 of FY22.

In Q4, *Publishers Weekly* hosted their virtual US Book Show, taking the place of Book Expo. This and other *Library Journal* and PW virtual events create intense competition for ALA. *Booklist* is competitive in the readers' advisory and collection development space and partners with several publishers on related webinar events.

In addition to seeking new licensing opportunities, across the department we must review the contracts that include ALA Publishing content (and other units where included in these legacy contracts) to ensure they are appropriate for licensing in the current digital environment and that they maximize revenue opportunities for specific types of content. (Many of *Booklist's* reviews are accessed through third-party platforms and products, representing a baseline average of \$850,000 in revenue per year, for example.)

Translation partners for RDA: Resource Description and Access increasingly want a revenue share for their work as the impact of COVID is felt across library budgets internationally. We must reevaluate the business model to accommodate these international partner needs.

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

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

The magazines and elearning have more measurable direct engagement than products such as books, posters etc. One of our clearest measures of member/ non-member activity and engagement would be percentage of transactions with member discounts. A high percentage of our sales do not have linked member information because they go through distributors (Amazon, Baker & Taylor, EBSCO, etc.) that use proprietary ordering systems and don't share customer data. Some orders are placed by accounting/ administrative departments of institutions that may be ordering for members but don't use member numbers to apply for discounts.

Booklist Q4

- 7,821 print subscribers (+491 from Q3)
- 61 institutional digital subscriptions (-4 from Q3)
- 373,558 Booklist newsletter subscriptions (overlapping addresses—top single newsletter is around 96K) (+11,772 from Q3)
- 4,952 active profiles, Booklist Online (+92 from Q3)
- 43,000 Twitter followers (+500 from Q3)
- 16,313 Facebook page follows; 14,784 Facebook page likes
- YouTube channel subscribers 401 (+40 from Q3)
- 448 LinkedIn followers (+81 from Q3)
- Q4 Podcasts: 4,254 listens for 8 podcasts. FY21 YTD cumulative: 18,287 for 47podcasts
- Q4 webinars: 23,988 registrants for 22 webinars (FY21 cumulative = 97,210 for 73 webinars)

American Libraries and AL Direct Q4

- 46,822 recipients AL print (June) (+1,619 from Q3)
- 31,729 average recipients weekly AL Direct (-1,560 from Q3)
- 12,742 podcast listens (FY21 cumulative = 56,672 listens)
- 96,352 Twitter followers (+4,095 from Q3); 17,504 Facebook page followers (+96 from Q3)

Digital Reference/RDA Q4

- 2,468 Toolkit subscribers (+ 89 from Q3)
- 9,937 users (+ 43 from Q3)
- 19,030 newsletter recipients; 1,478 RDA-L email subscribers

- 1,304 subscribers to RDA Toolkit YouTube Channel (+94 from Q3)

eLearning Solutions Q4

- 416 registrants, 40 events
- FY21 cumulative: 3,820 registrants, 166 events

ALA Graphics Q4

- 1,209 orders, 5,881 products purchased, 60,000 printed catalogs mailed
- FY21 YTD cumulative: 6,737 orders, 33,211 products purchased, 180,000 printed catalogs mailed

ALA Editions/ ALA Neal Schuman Q4

- 1,360 orders, 6,332 units purchased (after returns)
- FY21 YTD cumulative: 8,678 orders, 47,260 units purchased (after returns), 136,779 print catalogs mailed

ALA Store Q4

- 118,949 visits (-16,051 from Q3) Note: Unique visitor stats not available in Google Analytics
- 460,727 unique pageviews
- Users typically spend about 2 minutes per visit to the store
- 42% of users find the store via organic search (+5% from Q3); 32% of users find the store via direct links; 19% of users find the store via referrals from other sites (mostly ala.org); 5% of users find the store via social media

Note: The move to CDC had a bigger impact than predicted on Q4, due to slow shipments from the previous vendor. Few orders were fulfilled in July, and we entered FY22 with a high number of back orders. As of 9/15/21, Editions/ Neal-Schuman and ALA TechSource have 176 back orders for 1,273 items, totaling just over \$60,000. Lightning Source sales were not booked in July and August, but will be booked in September, accrued to FY21.

Describe the Most Impactful Unit Activities this Quarter, Q4 FY21:

General department work included the move to CDC and sending a bid out to printers for magazines, catalogs, and journals. A new contract is due January 2022.

Booklist Q4:

- Production, editorial, and marketing planned for *Booklist's* new monthly patron-facing product, *Booklist Reader* to prepare for the September FY22 launch. Currently, *Booklist Reader* is a digital only, monthly publication.
- Closed the best year ever for *Booklist* webinars—number of webinars, revenue, registration, and sponsorship.
- Secured \$68,000 for the year-long VOICES promotion, which highlights diverse authors and EDI.
- Closed a very successful first year of *Booklist's* new Advisory Board, where the Board approved a new mission statement and partnered with *Booklist* staff to launch a new patron-facing product. Terry Hong, who agreed to serve as Chair for one year, has closed out her term and a new Board Chair has been selected.
- Virtual ALA Annual Conference in June included two collaborative sessions with United for Libraries, a *Booklist* Read & Rave, and the Carnegie Medals for Excellence in Fiction and Nonfiction awards celebration.

ALA Editions/ALA Neal-Schuman Q4:

- Published a total of 8 book projects. The cumulative total of books to be published in FY21 was 36 ALA titles and 12-14 Facet titles.
- A two-page spread spotlighting a wide selection of essential resources for libraries to further the core values of equity, diversity, inclusion, literacy, and outreach launched in the Fall/Winter 2022 Catalog. The spread included a message from ODLOS reaffirming the importance of EDI resources alongside a link to a new EDI landing page on the ALA Store.

- Revenue from translations and Sourcebooks exceeded our expectations in FY21.
- Marketing efforts slowed in Q4 during the vendor change but normal activity has resumed with three targeted catalogs (including textbook/course materials and academic titles) arriving in mailboxes for the start of FY22 Q1.
- CDC saved transportation costs by subsidizing the transfer of inventory from the previous fulfillment vendor.

American Libraries Q4:

- Produced [six issues of the Daily Scoop](#) e-newsletter and [35 blog posts](#) covering the 2021 Annual Conference in June
- Concluded its months-long planning of the magazine's 20th anniversary editorial package on 9/11 and its impact on the library world.
- With *Booklist's* adult books editor, coordinated an interview with Pulitzer Prize-winning author Colson Whitehead for the September/October issue.
- Commissioned and published coverage of three virtual conferences: [Association of Jewish Libraries](#), [United for Libraries](#), and [IFLA](#) virtual conferences
- Worked with partners ACRL to implement JobLIST eyebrow navigation on the ALA homepage with IT's help
- Published the work of ALA units such as [RDA](#), [UFL](#), the [Office for Intellectual Freedom](#), and the [International Relations Office](#) in the [July/August digital issue](#)

Digital Reference, RDA Q4:

- The server migration of RDA Toolkit started in Q4 FY21 and continues into Q1 FY22
- Free monthly webinars were introduced that have routinely attracted well over 500 registrants

eLearning Solutions Q4:

- Continued work with Web Courseworks on the new eLearning website and with CE stakeholders across ALA to develop standards and practices around the site. As FY21 wrapped up, the work within Publishing transitioned increasingly to the Continuing Education Unit, which officially launched in FY22.
- Encouraging sales from Q3 continued, with FY21 budget goals achieved. In addition to continued strong sales from the RDA Lab Series, we saw strong sales for several "evergreen" events on cataloging, programming, and reference. The workshop *Creating Anti-Racist Storytimes: Activism, Belonging, and Change* had over 120 registrants.
- Sales in bulk purchases included over \$5,000 in purchases from the Delaware and Kentucky library systems booked in Q4. Over \$1,500 was booked in group sales for webinars.

ALA Graphics Q4:

- Published 9 print products and offered 6 new designs on 46 products in the virtual shop. Print-on-demand highlights include Newbery 100 Anniversary products created through a new partnership with ALSC.
- ALA Graphics mailed its fall catalog in Q4 featuring celebrity Channing Tatum on a READ poster and other items by award-winning illustrators including Jon Klassen and Jerry Craft.
- ALA Graphics launched the Baby Yoda library card licenses in the catalog and completed sales to 9 libraries.
- Licensing models continue to show promise; setting up some of the new approaches is time-consuming and requires coordination with and support from Finance & Accounting.

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

In Q1, in concert with cross-functional team activities, we will develop specific KPIs that reflect the Pivot Strategy priorities and will focus on setting up FY22 individual and unit goals.

Extensive staff time and attention will continue to be dedicated to the transition to the Chicago Distribution Center. The release of delayed backorders will have a positive impact in Q1 FY22. With CDC, work has started to look at umbrella agreements for reprinting, along with moving into BiblioVault, which will provide for a consolidated, streamlined reprint

process as well as anticipated savings for print copies. BiblioVault also offers increased marketing potential for both print and digital product (including ebooks).

Books published in Q1 will cover a wide range of topics including library services and incarceration; books for children and teens that center the lived experience of generational poverty; information policy; disaster planning; fundable grant proposals; copyright guidance for common scenarios; AASL's Shared Foundations Include and Explore; and scholarly research for undergraduates. In addition to digital mailers and eblasts, books will be promoted in three targeted catalogs—new and noteworthy titles for a general library audience, textbook and course resources, and academic library titles (including ACRL titles).

In Q2 in collaboration with Sourcebooks, 3 one-year reading journals featuring titles recommended by editors from the association and *Booklist* will be available to the public.

Promotion for *Booklist's* new digital-only patron-facing product, Booklist Reader, will be ongoing to encourage use and help boost subscriptions while also expanding reach to the public in all communities.

ALA Graphics and ALA Editions/Neal-Schuman will partner on running the conference store at the AASL national conference in October, with a focus on AASL titles and authors on the books side.

Digital Reference continues to work on the server migration, on the free webinar series, and with ALA Finance staff to create efficient subscription payment management processes and to implement more accurate pursuit of unpaid subscriptions.

As continuing education transitions to being a stand-alone unit in FY22, acquisitions of new content focused on EDI and social justice-themed events will be one of the centerpieces of the future acquisitions strategy, as well as the work of the CE cross-functional team. Related events have attracted strong registration, highlighting this need.

The Publishing & Media cross-functional team's work and outcomes in FY22 will be a focus for many in the department.

REFERENCE AND USER SERVICES ASSOCIATION (RUSA)

Division Executive Director: Bill Ladewski

Budget Amount (Overall Revenue/Expense): \$334,783, Expense - \$378,717

of Staff: 3.1 (Staff divides time between RUSA, ASGCLA (As it sunsets at end of FY22) and ODLOS)

Status Report on Pivot Strategy, Aligned Unit Goals:

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

With the most recent membership numbers provided through June, RUSA had 2,555 members. This represented a decrease from April's membership figure of 2,709. In a continuing effort to expand RUSA's reach and share the benefits of RUSA with audiences that may not be familiar, RUSA's current president has arranged for RUSA representatives to be present at 4 upcoming state and regional library conferences. RUSA representatives at these programs will have either formal speaking roles on the agenda or be able to act as RUSA 'ambassadors' during the program. Through these efforts at upcoming state and regional conferences we're hopeful more individuals are made aware of the benefits available through RUSA and choose to learn

more about membership. Another recent effort to support membership growth for RUSA was the development of a Membership Recruitment and Retention Task Force. This task force will investigate library workers' reasons for joining or not joining RUSA, as well as why they choose to remain members or leave the organization.

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

RUSA plans to introduce its CE-focused RUSA essentials bundle shortly after the new Learning Management System launches. Through August, RUSA's CE revenue continues to outperform budget, informally reporting a total revenue figure of \$124,190 for FY21. This would represent an approximately \$40,000 positive variance to budget (+47%). Planning of a RUSA Virtual Forum continues to move forward. Expectations remain for holding a Virtual Forum in either March or April 2022. This timeframe was considered preferred as it would occupy the time between January LibLearnX and June Annual Conference where any potential conflict hopefully would not occur. An initial budget has been drafted and focus will be on keeping controllable costs at a minimum. If the program proves successful, we hope this will bring in additional revenue to our CE revenue line helping us achieve 2% growth in FY22 or higher.

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

- Finalizing FY22 Budget: RUSA accomplished a major goal of delivering an FY22 budget that did not come in at a deficit. RUSA submitted a budget for FY22 with a positive net of \$5,775. RUSA was able to find new staff sharing partners for FY22 since sharing staff with ASGCLA was no longer an option. Those new partners are the Office of Intellectual Freedom (OIF), ODLOS, and the ALA Division YALSA. Each partner is sharing a percentage of time with a separate RUSA staff member. These three partnerships have all gotten off to a very good start with both staff and operating units feeling very positive about working together.
- Definition of Reference: The ongoing work towards updating the Definition of Reference continues as we are now requesting final public comment. The Professional Resources Committee is currently seeking public comment on the revised Definition of Reference. The document has been presented for public comment at multiple town halls and is in the final stage of review before being presented to the RUSA Board. This survey is an opportunity for all to submit feedback before final review.

of Members (for Divisions): 2,555 as of June 2021

of Members/non-members/other stakeholders reached during quarter (for all Units): Approximately 40,000 through association wide sharing of our ongoing Definition of Reference work.

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

RUSA has continued to maintain a full [CE calendar](#), exceeding the growth we achieved in this area last fiscal year. Our membership has slightly declined this fiscal year, mirroring the decline felt throughout the association. RUSA Town Halls were a popular addition to this fiscal year's event calendar. Our June Town Hall was a celebration of this year's RUSA Achievement Award Winners. The RUSA Futures Task Force determined the route to sustainability for RUSA will be dependent on growing membership and overall revenue along with managing internal resources so that they properly align with and support the goals of the pivot strategy (5% membership growth, 10% revenue growth).

- Through the 4Q of FY21, RUSA CE has presented 15 e-courses and 12 webinars totaling 1149 participants. Additional confirmed upcoming CE programming consist of 6 e-courses and 5 webinars. As stated earlier, RUSA CE in FY21 will likely exceed budget by nearly \$40,000.

- Our [RUSA Town Hall](#) programs continued to be a popular attraction. RUSA held its final Town Hall in FY21 in [June](#). In total, 9 Town Halls were held over the last year. RUSA hopes to continue with this popular member benefit as we begin the new fiscal year.
- The work of the RUSA Futures Task Force concluded in June 2021. Final recommendations brought forward by the Task Force were the creation of a Member Recruitment and Retention Task Force to develop a plan for increasing membership, and for the Award Coordinating Committee to review and suggest recommendations for reducing costs associated with the many RUSA Awards.

Describe the Most Impactful Unit Activities this Quarter:

- Decolonizing the Catalog webinar. In this webinar held July 7th, a panel of experts explored recent efforts to draw attention to and amend harmful language in library records related to the African American experience in the United States. The 90-minute webinar was divided into three parts:

First, Elizabeth Hobart discussed the inadequacy of current subject headings related to anti-racism and the difficulties that patrons face in locating anti-racism books in the library catalog. She drew from her recently published article in C&RL Antiracism in the Catalog: An Analysis of Records. Hobart's discussion was followed by a presentation that explores one effort to update subject authorities related to African American Studies in conjunction with the Library of Congress.

Staci Ross and Michelle Cronquist, then detailed their work as Co-Chairs of the African American Subject Funnel Project. They described the process that they go through to update subject headings and assess the successes and challenges that they've faced in getting revisions approved.

Lastly, a final discussion focused on local efforts by the Triangle Research Libraries Network (TRLN) to remap problematic, outdated, and offensive LC Subject Headings by "replacing" these terms in their public catalog/discovery layer. Kelly Farrell a Program Officer at TRLN presented on this collaborative effort.

The webinar had a total of 309 participant, which was by far the largest webinar audience for a RUSA program this year.

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

- RUSA Section BRASS fall program: The first ever [BRASS Fall Thing](#), a new virtual event open to all will be held October 19 - 21. The theme is business information literacy and will be most relevant to academic libraries. The event includes a combination of live programming and access to vaulted programming. The 7 hours of live programming includes workshops and lightning talks focused on business information literacy, the Framework, and teaching students how to find, use, and evaluate business resources and information.

The BRASS Vault includes access to:

- Previous BRASS Webinars
 - Libraries Build Business (March 2021)
 - 2020 AACSB Accreditation Standards: What They Mean for Business Librarians (December 2020)
 - The New Competencies Smell: Taking the RUSA Business Research Competencies for a Drive (August 2020)
- Data in Libraries Webinar Series (Spring 2020) has four parts:

- Data Basics & The Reference Interview
- Open Data
- Data Processing and Visualization
- Understanding and Work with APIs
- BRASS On-Demand Programs from ALA Annual 2021
 - Follow the money: Help watchdogs, whistleblowers, and our communities find and understand financial trails and organizational relationships
 - Business Reference in Public Libraries Made Easy

UNITED FOR LIBRARIES (UFL)

Division Executive Director: Beth Nawalinski

Budget Amount (Overall Revenue/Expense): \$346,093 (Revenue)/\$341,452 (Expense)

of Staff: 2.8

Status Report on Pivot Strategy, Aligned Unit Goals:

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

Statewide relationships focus on live and on-demand training for Trustees, Friends, Foundations, and the staff who work with these volunteers. Work is underway on a communications and marketing plan focused on the value proposition of membership to individuals and libraries engaging with United through statewide training partnerships. Reconfiguring "group members" continues with a projected timeline of implementation for the start of FY23 on 9/1/22.

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

The second annual [United for Libraries Virtual: Trustees, Friends, and Foundations](#) was held August 17-19, 2021. Total revenue reached \$27,000 with \$11,100 in sponsorship and \$16,000 in registration. The event featured ten (10) programs, roundtable discussions, and a free open to all Gala Author Tea in partnership with publishing sponsors and Data Axle Reference Solutions. The most popular session was *How to Be an Inclusive Leader: Your Role in Creating Cultures of Belonging Where Everyone Can Thrive* with author Jennifer Brown in conversation with Christopher Platt, Library Director, Mono County Library System. On-demand access is available for purchase.

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

In the fourth quarter, United renewed one state contract (NJ), upgraded two state contracts (OR, VA), and welcomed one new state contract (NH). United now has statewide group membership *or* statewide training contracts with AL, MA, MD, MI, MT, NE, NV, NH, NJ, SC, SD, and TX, and regional contracts in CO and MN. Contract discussion is underway with additional states.

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

- The second video in the new Making the Case for Your Library: Creating Board & Community Champions training series is complete featuring Anne Arundel County Public Library Board of Trustees Chairman

Will Shorter, recipient of the 2021 ALA/United for Libraries Trustee Citation. The series will be available for sale in the new Learning Management System (LMS) this fall.

- [Challenges & Crises: Preparing Your Board of Trustees](#), the United for Libraries President's Program during the 2021 ALA Annual Conference, featured speakers from two libraries in conversation with 2020-2021 President David Paige about challenges and crises experienced by the Anne Arundel County (Md.) Public Library and Fairfax County (Va.) Public Library. Topics covered included how to be proactive in developing a well-prepared board, and what best practices, policies, and procedures need to be developed or revisited. The [on-demand recording](#) is accessible at <https://elearning.ala.org>.
- United for Libraries is launching its blog and e-newsletter, which replaces a bi-monthly print newsletter. The change saves more than \$25,000 per year. The blog and e-newsletter will feature curated content from a partnership with [Boardsource](#).
- During the fourth quarter of FY21 and first quarter of FY22, United is transitioning statewide partnership access from [Teachable](#) to the new ALA Learning Management System (LMS) at <https://elearning.ala.org>. In addition to moving the courses between platforms, United is hosting live webinars for each statewide partner state to help the approximately 17,000 users navigate the platform change.

of Members (for Divisions): 4,205 (from July Membership Report)

of Members/non-members/other stakeholders reached during quarter (for all Units): 30,000+

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

- Approximately 17,000 individuals are registered to access United live and on-demand training.
- Learning Live registration counts:
 - June: 203
 - July: 110
- Library of Virginia Friends Workshop presented by United for Libraries: 120
- ALA Annual Conference:
 - Challenges & Crises: Preparing Your Board of Trustees: 182
 - Ask the Experts: Boards of Trustees: 123
 - Gift Acceptance Policies Part 1: When "Free" Isn't Free (United for Libraries Learning Live): 203
 - Book Clubs Strengthen Community and Celebrate Diversity (on-demand): 528
 - Governing a Crisis: Tips for Boards during Emergencies and Disasters (on-demand): 134
 - Library Budgeting: Working with What You Have and Advocating for What You Need (on-demand): 423
 - Reads Like Fiction: Nonfiction You Can't Put Down*: 903
 - It's a Mystery to Me*: 521
 - Isn't it Romantic*: 390
 - First Author, First Book: 525
 - Gala Author Tea Sponsored by Data Axle Reference Solutions*: 2,406

*United invited Booklist staff and advisory board members to moderate three author panels. 2022-23 ALA President Lessa Pelayo-Lozada moderated the Gala Author Tea. Booklist's new patron-facing product Booklist Reader was promoted during each of these programs.

Describe the Most Impactful Unit Activities this Quarter:

[United for Libraries Virtual: Trustees, Friends, and Foundations](#) was held August 17-19, 2021. Total revenue reached \$27,000 with \$11,100 in sponsorship and \$16,000 in registration. The event featured ten (10) programs, roundtable

discussions, and a free open to all Gala Author Tea in partnership with publishing sponsors and Data Axle Reference Solutions. The most popular session was *How to Be an Inclusive Leader: Your Role in Creating Cultures of Belonging Where Everyone Can Thrive* with author Jennifer Brown in conversation with Christopher Platt, Library Director, Mono County Library System. On-demand access is available for purchase.

Educational sessions included:

- Life Cycle of a Board Member: How to Build a Powerhouse Board
- Tips, Tricks & Tools: Building a Better Budget
- Auditing Diversity in Library Collections
- Book Buzz: Book Club Picks - Sourcebooks, Mariner Books, Penguin Random House
- How to Be an Inclusive Leader: Your Role in Creating Cultures of Belonging Where Everyone Can Thrive
- PGCMLS Vaccine Hunter Hotline: A Case Study in Advancing Equity with Library Foundation and Corporate Philanthropy
- Every Volunteer an Advocate: Empowering Boards and Friends for Action
- Advocating in Advance: Keeping Ahead of Legislation and Local Initiatives (Speakers: ALA staff Megan Cusick, Deborah Caldwell-Stone)
- What's More Punk than the Public Library? Fundraising as a Friends Group
- Policies and Practices for LGBTQIA+ Inclusive Libraries: What Trustees Need to Know

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

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

- September 14, 2021, 2:00 pm ET: Celebrating National Friends of Libraries Week
 - October 12, 2021, 2:00 pm ET: Making the Ask for End-of-Year Giving
 - November 9, 2021, 2:00 pm ET: Virtual Fundraisers
 - December 14, 2021, 2:00 pm ET: Annual Board Self-Evaluation
- [National Friends of Libraries Week](#): October 17-23, 2021
Friends of Libraries groups have their very own national week of celebration! United for Libraries will coordinate the 16th annual National Friends of Libraries Week Oct. 17-31, 2021. The celebration offers a two-fold opportunity to celebrate Friends. Use the time to creatively promote your group in the community, to raise awareness, and to promote membership. This is also an excellent opportunity for your library and Board of Trustees to recognize the Friends for their help and support of the library. A compilation of ideas and sample publicity materials available on the United for Libraries [website](#). See also the event posted on [Facebook](#).

In conjunction with National Friends of Libraries Week, two awards of \$250 will be given to Friends of the Library groups for activities held during the celebration. Applicants will be judged on creativity and innovation; involvement of Friends, library staff, Trustees, and/or advisory committee; recognition of Friends group; and promotion of Friends group to the community, school, students, and/or faculty. Full application criteria can be found at https://www.ala.org/united/grants_awards/friends/friendsweek.

YOUNG ADULT LIBRARY SERVICES ASSOCIATION (YALSA)

Division Executive Director: Tammy Dillard-Steels

Budget Amount: \$641,162

of Staff: 4.5

Status Report on Pivot Strategy Aligned Unit Goals:

YALSA Board of Directors has approved a new three-Year strategic plan and revised the mission.

Revised Mission:

Through networking, advocacy, and professional development, the Young Adult Library Services Association empowers all those involved in the profession to provide equitable, diverse, and inclusive teen services.

Objectives:

- Strengthen engagement efforts with all those involved in teen library services by cultivating member connections and increasing membership.
- Achieve financial stability and support growth by attracting and building alternative revenue sources.
- Provide and promote programs and resources that speak to the diversity of our members and maximize membership value.
- Implement advocacy initiatives to promote the importance of teen library services to key internal and external stakeholders.

of Members (for Divisions): YALSA Membership 3,438, a 12.18% decrease from 2020.

of Members/non-members/other stakeholders reached during quarter (for all Units): Weekly, over 3,000 members receives YALSA's E-News with an average open rate of 30%. Additional campaigns were sent to promote and advertise YALSA's Symposium.

Narrative Description Members/non-members/other stakeholder engagement

As of September 20th, YALSA's monthly webinars registration garnered over 1,951 registrants for FY21 and 95 for FY22.

April 2021: **Teen Mental Health - In Their Own Words** - [Buy this Recording](#)

May 2021: **Serving on a YALSA Selection List Committee** - [Buy this Recording](#)

June 2021: **Spring Showcase - Champions of Change** - [Buy this Recording](#)

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

Past and Upcoming Meetings Webinars and Celebrations:

- **Snack & Chat: YALSA New Strategic Plan and Mission Discussion**
September 30, 2021: Thursday, 2PM Eastern

Learn more about the future of YALSA and where this organization plans to go in the coming 3 years. Join YALSA's Board on September 30 as they discuss YALSA's new strategic plan and mission and see where you can fit in to help YALSA reach those goals.

- **Webinar: Connecting Teens with Technology at the Library!**
October 14, 2021: Thursday, 2PM Eastern

Marie Harris and Kelly Czarnecki will be discussing their recent publication, *Connecting Teens with Technology at the Library*. (Rowman and Littlefield). They will discuss how to host a technology program in your library that you may not have tried before. You will also gain ideas for how to set up technology. They will also discuss the benefits and worked involved to sustain a makerspace in the library.

- **YALSA's 2021 Young Adult Services Symposium: Theme - Biggest Little Safe Spaces: Serving Teens During Times of Adversity.**
November 5-7, 2021, Reno, NV and Virtual

The Young Adult Services Symposium is open to everyone, not just YALSA members. The past year has presented teens and the libraries that serve them with numerous challenges that will continue to affect them in 2021 and beyond. What does the future hold for today's teens? Where do we as librarians go from here? What's next for our libraries? Join YALSA, librarians, and YA authors in Reno for the 2021 Symposium as we discuss strategies for serving teens during difficult times and continue to develop programs that ensure our biggest little safe spaces thrive for years to come. Please register for the [In-person](#) or [Virtual](#) Symposium by September 30th for the best pricing.

Name of Unit or Division & Contact person	Name of EDIS Initiative, Program, Activity, Service or Tool	Brief Description/Summary of EDIS Initiative, Program, Activity, Service or Tool - Please limit to no more than three sentences.	Dates (approx. start and projected end, if relevant)	Who benefits? (e.g., BIPOC LIS students; Library staff serving incarcerated or detained individuals)	How do they benefit? (e.g., scholarships or grants of \$K amount; Membership for X period; grant - free division membership or conference registration equal to \$K amount (etc.). Please name concrete benefits in terms of funds, time, access to specific offerings, etc.)	How many will benefit this year (FY22)?	How many beneficiaries since the program began?	URL where further information can be found
ASSOCIATION FOR SCHOOL LIBRARIES								
AASL	AASL National Conference	Shared AASL core values for EDI. Program submitters were asked to provide in an optional section any personal information or other information related to the school communities, learners, or parents/caregivers/guardians they served for AASL to consider during the review process when looking to meet those core values.	May 2020 to Feb 2021	School librarians				
AASL	Travel Grants to National Conference	Shared AASL commitment to EDI and in optional section asked applicants to provide information. These areas may include, but are not limited to, ethnicity, gender or sexual identities and expressions, religion, disability status, nationality, immigrant/refugee/new American, etc.			Out of 152 applications 58 (38%) chose to not self-identify, 11% identified as BIPOC with 5% specifically identifying as African American/Black, and 2% identified a disability. Comparatively to grant recipients, out of 30 grantees 8 (27%) chose to not self-identify, 27% identified as BIPOC with 10% specifically identifying as African American/Black, and 3% identified a disability.			
AASL	Knowledge Quest, the AASL association journal.	In the Mar/Apr 2021 issue five Black school librarians shared their experiences teaching in their various school libraries and bringing to bear who they are as Black women educators. Magen Rose, Adrienne Almeida, K.C. Boyd, Jean Darnell, and Erika Long refocused conversations about equity, diversity, and identity to focus on schools and school librarianship. The Mar/Apr 2022 issue will explore how school librarians are dealing with Critical Race Theory challenges and how they determine whose voices are included in their collections. Including diversity audits and weeding decisions.			Erika Long shared a video via Instagram, relating how important it was to have an issue of KQ feature Black school librarians' voices. https://www.instagram.com/BookMindsHQ/ https://tumblr.mindshomeshare.sheryll/			https://knowledgequest.aasl.org/explore-the-experiences-of-black-school-librarians-in-the-mar-apr-issue/
AASL	Developing Inclusive Learners and Citizens	To aid school librarians in nurturing inclusive learning communities, AASL tasked a 2019 ALA Emerging Leaders team with developing a guide of reflection activities and resources based on the Include Shared Foundation on the National School Library Standards.						https://standards.aasl.org/project/inclusion/
ASSOCIATION FOR COLLEGE AND RESEARCH LIBRARIES								
ACRL (Allison Payne), along with ALA's Office for Diversity, Library and Outreach Services (Kristin Labadie), the Public Library Association (Scott Allen), and the Association of Research Libraries (Johla Dool)	Building Cultural Proficiencies for Racial Equity Framework	Creating a Cultural Proficiencies Framework to help public and academic libraries build inclusive cultures, within libraries and their broader communities, through guidelines on the development and implementation of organizational policies and professional practices that support diverse libraries with a diverse workforce.	September 2019 through December 2021	Public and academic librarians and library workers, and the communities they serve.	Libraries and those who work in libraries recognize that without systematic inclusion and foster an anti-racist vision for the profession	Unable to quantify, but once the FW is finalized and approved, there may be data on downloads and implementation.	N/A. Framework is still being drafted.	https://www.libraryjournal.com/2021/05/19/librarians-announce-joint-cultural-proficiencies-task-force
Allison Payne, ACRL Program Manager for Strategic Initiatives	ACRL Membership Funding for 50 BIPOC Library Workers	The ACRL Board of Directors approved funds to support up to 50 one-year memberships for ALA and ACRL (a value of over \$200 per membership) for Black, Indigenous, and People of Color (BIPOC) library workers, especially those who serve underrepresented populations.	April 2021 to March 2022	BIPOC library workers	Free ALA and ACRL membership (up to \$200 value/person), member engagement and orientation to ACRL/ALA	48 (50 awarded, but still waiting to hear back from two recipients)	48	https://acrli.aasl.org/acrlinside/acrl-membership-funding-for-bipoc-library-workers/
Allison Payne, ACRL Program Manager for Strategic Initiatives	ACRL Diversity Alliance	The ACRL Diversity Alliance program unites academic librarians committed to increasing the hiring pipeline of qualified and talented individuals from underrepresented racial and ethnic groups. Member institutions can join the alliance by establishing a residency program for at least one individual that lasts a minimum of two years (three years preferred).	2017 to present	Residents from underrepresented racial and ethnic groups, academic libraries	By working together and thinking more broadly, ACRL Diversity Alliance institutions will help diversify and thereby enrich the profession.	58 member institutions.	77 unique institutions	https://www.ala.org/acrl/issues/diversityalliance
Allison Payne, ACRL Program Manager for Strategic Initiatives	Joint ACRL Board of Directors/Budget & Finance Committee EDI Working Group	Change: Further explore and study existing equity, diversity and inclusion (EDI) work across ACRL through a financial lens, and consider how to prioritize and fund social justice or antiracist work that will be beneficial to workforce development, training and professional development.	Fall 2020 to Fall 2021	ACRL members and library workers	The findings from the group will increase ACRL's awareness of gaps in funding for EDI activities. The group's recommendations will include concrete ideas for improvement.	Will need to wait for report and recommendations to see if this can be quantified.	n/a	n/a, report will be posted publicly in fall 2021.
Robert (Jay) Malone, ACRL Executive Director, Kara Malenfant, ACRL Senior Strategist for Special Initiatives	Short-term Priority Setting	The ACRL Board of Directors met in June 2021 to identify short-term priorities for ACRL for the next one to two years. The need for priority setting was brought about by significant changes in higher education, academic libraries, and ALA that necessitated identifying and drafting short-term priorities. In July 2021, a Board Working Group took the outcomes from the priority setting discussions, and updated the annual report/work plan template, which now includes a section on short-term priorities (i.e., Equity, Diversity and Inclusion, Communication and Engagement, and Membership). Committee leaders were asked to include their short-term goals as part of their 2021-2022 work plans.	2021-2024	ACRL committee members and academic library workers	Plans have not been implemented for 2021-2022, but could activities could include increase diversity on committees and increase in diverse committee offerings.	unknown at this time	unknown at this time	https://connect.ala.org/acrl/community/community-home/display/newsItem?MessageID=64333a-0699-43db-b046-59f5f9419a5c&communitykey=00776a01-f58b-40c4-b6c7-7c5d9f5711&noOpenNewsItems=64533a-0699-43db-b046-59f5f9419a5c
Mary Jane Petrowski, ACRL Associate Director	ACRL Value of Academic Libraries Committee Spotlight Series: Practices of Equity and Social Justice	Through this spotlight series on practices of equity and social justice, the committee is asking librarians from various corners of librarianship to discuss what it means to integrate equity and social justice into our practice and assessment as well as how they are working toward that goal.	February 17, 2021 to present	Academic and research librarians and library workers	Designed to help academic librarians participate in work that is aligned with the mission, vision, and values of their institutions, as well as providing evidence of the value they provide to these institutions.	There are Google Analytics available for each post. There are also around 1,000 people who subscribe to the RSS feed for the site, mostly via email, who would perhaps have seen it in daily digest form (these aren't included in the GA stats).	At least 1,000	<ul style="list-style-type: none"> https://acrli.aasl.org/acrlinside/val-spotlight-series-practices-of-equity-social-justice-itchburg-state-university-library/ https://acrli.aasl.org/acrlinside/val-spotlight-series-practices-of-equity-social-justice-dr-romelia-salinas/ https://acrli.aasl.org/acrlinside/val-spotlight-series-practices-of-equity-social-justice-dr-kawana-bright-and-dr-monica-colon-aguirre/ https://acrli.aasl.org/acrlinside/val-spotlight-series-practices-of-equity-social-justice-one-damascio/ https://acrli.aasl.org/acrlinside/val-spotlight-series-practices-of-equity-social-justice-maha-kumaraj/ https://acrli.aasl.org/acrlinside/val-spotlight-series-practices-of-equity-social-justice-christina-fuller-gregory/ https://acrli.aasl.org/acrlinside/val-spotlight-series-practices-of-equity-social-justice-mantra-roy/ https://acrli.aasl.org/acrlinside/val-spotlight-series-practices-of-equity-social-justice-gemnicka-piper/
ASSOCIATION FOR LIBRARY SERVICE TO CHILDREN								
ALSC - Alena Rivers	ALSC Equity Fellowship	Through the ALSC Equity Fellowship program, ALSC affirms its commitment to equity, diversity, and inclusion by engaging new generations of racially and ethnically diverse library professionals.	Fall 2019 - Summer 2022. May be ongoing if pilot project is evaluated and approved as a long-term fellowship opportunity.	American Indian/Alaska Native/First Nations, Asian, Black/African American, Hispanic/Latino, Middle Eastern, and/or Native Hawaiian/Other Pacific Islander individuals who commit to service within ALSC	Fellowship recipients will receive funding for two-year ALSC and ALA memberships and one year of conference registrations and travel expenses, if applicable, for ALA or ALSC conferences (approx. \$12,000 for five participants). Fellowship recipients also receive mentorship from members of the Equity, Diversity, and Inclusion within ALSC task force.		5	11 https://www.ala.org/alsc/awardgrants/scholarships/equity-fellowship
ALSC - Sarah Pons	Continuing Education	ALSC CE has integrated EDI questions into continuing education submissions, to ensure all CE offerings (and their instructors) are engaging with EDI concerns as they present their works and its impact on our members. The Education Committee is also consciously looking at and recruiting CE opportunities that engage with issues of EDI for our members. Further, our Program Coordinating committee, which select conference presentations, is intent on curating out specific EDI-centric programs at all ALSC conferences.	N/A	Anyone viewing/engaging with ALSC CE	By making our CE offerings intentionally conscious of EDI concerns, and requiring presenters and instructors to explicitly show how their work/presentations engage with issues of EDI, those CE experience become more meaningful for members.	1,000+ (anyone who takes an ALSC CE course/webinar or attends conference programming)	N/A	EDU question(s) on CE Presentation Proposal: https://www.ala.org/alsc/learning/online-education-proposal
ALSC - Elizabeth Serrano	ALSC BIPOC New Membership Funding	In 2021, and in alignment with the 2020-2023 ALSC Strategic Plan, ALSC funded (DO) two-year ALA and ALSC memberships to students and paraprofessionals who identify as BIPOC. Guided by ALSC's Membership Committee, this group will also receive opportunities to connect with each other and engage in ALSC work virtually.	May-June, 30, 2023	BIPOC LIS Students and Paraprofessionals.	Free two-year ALA and ALSC membership up to \$150 and guided engagement opportunities.		20	https://www.ala.org/alsc/new-membership-funding-black-indigenous-and-people-color-bipoc
ALSC - Elizabeth Serrano	ALSC BIPOC Mentoring Membership Funding	ALSC has launched the BIPOC Mentoring Membership Funding Program, which is geared towards recruiting and supporting a diverse pool of mentoring program participants. The objective is to diversify our membership, while also diversifying librarianship and new cohorts of leaders in the field of children's services.	Sept. 15-June, 30, 2022.	BIPOC children's library professionals	Free one-year ALA and ALSC membership up to \$200. Mentorship for 10 months.	Approximately 40 individuals.		https://www.ala.org/alsc/member-center/alsc-bipoc-mentoring-membership-funding
ALSC - Laurn Schulte Cooper	Children & Libraries Journal	The following statement was added to the CAL author guidelines: Our publication is dedicated to sharing content to promote the values of equity, diversity, and inclusion in all aspects of library service to children.	Jan-21	J BIPOC writers, who may be encouraged by the statement and submit an article manuscript. JI CAL readers - as the statement may attract new writers with fresh perspectives and story ideas.	N/A	N/A	N/A	https://www.ala.org/alsc/publications-resources/cal/author-guidelines
ALSC - Laura Schulte Cooper	Children & Libraries Journal	The Summer 2021 issue of CAL included an article entitled "Expanding Representation: ALSC's Equity Fellows Program."	Jun-21	This informational article was shared to raise awareness of the division's Equity Fellows program, which in turn may garner member support for the program into the future and/or generate interest and seek potential future program applicants.	N/A	N/A	N/A	https://www.ala.org/alsc/publications-resources/cal
ALSC - Angela Hubbard	Welcoming Spaces National Forum	MLSI grant focused on highlighting best practices of children's museums and libraries around serving recent immigrant and refugees.	September 2019 - August 2022	Patrons who are recent immigrants or refugees. Library and children's museum staff.	Forum participants - \$1,000 honorarium and \$80 worth of video equipment; access to a culminating best practices symposium.		24	0 N/A
ALSC - Alena Rivers	ALSC National Research Agenda for Library Service to Children (ages 0-14)	At the 2019 Annual Conference the ALSC Board approved the Research Agenda, led by the Research Agenda Task Force. The agenda includes six priority research areas, that identify relevant research questions and includes a bibliography of research done under each priority area. One of the six priority areas is Equity, Diversity and Inclusion.	Ongoing	The library community's BIPOC, LGBTQ, children and families and children with disabilities and their families.	Research in EDI continuing and developing concerns will ensure more informed programs and services that support the needs of a diverse library community.	N/A	N/A	https://www.ala.org/alsc/publications-resources/research-agenda
ALSC - Alena Rivers	Equity, Diversity & Inclusion Statement and Resource Webpage	ALSC members represent an ever-growing array of diverse backgrounds and experiences. All ALSC members are welcome to engage in ALSC activities and professional development with the expectation that their varied experiences will contribute to thoughtful interactions resulting in more informed work and a broader understanding of the communities they serve.	Ongoing	ALSC members, as well as their library communities	Providing EDI resources will ensure more informed programs and services that support the needs of a diverse library.	N/A	N/A	https://www.ala.org/alsc/about/alsc_idi_statement

Name of Unit or Division & Contact person	Name of EDJS Initiative, Program, Activity, Service or Tool	Brief Description/Summary of EDJS Initiative, Program, Activity, Service or Tool. Please limit to no more than three sentences.	Dates (approx. start and projected end, if relevant)	Who benefits? (e.g., BIPOC LIS students, Library staff serving incarcerated or detained individuals)	How do they benefit? (e.g., scholarships or grants of \$K amount, Mentorship for X period, grant... Free division membership or conference registration equal to \$K amount (etc.). Please name concrete benefits in terms of funds, time, access to specific offerings, etc.)	How many will benefit this year (FY22)?	How many beneficiaries since the program began?	URL where further information can be found
	Internal Messages	To this end, all ALSC members are expected to support a welcoming environment that is considerate of differing opinions.						
ALSC - Alena Rivers	Equity, Diversity & Inclusion Implementation Task Force	The task force's goal is to further the work of the prior Diversity Within ALSC Task Force by promoting awareness of EDI across the division as steps toward a more diverse and inclusive association. The task force's ongoing goal is to see EDI baked into the work of all the committees and on the minds of all ALSC members. Current task force work includes supporting and evaluating the Equity Fellow program. The task force has contributed to other divisional work in an advisory capacity, providing feedback on several projects.	Ongoing - until current task force charge is complete	ALSC members, as well as their library communities	Expansion of resources and understanding EDI will support the work of ALSC members and their library communities.	N/A	N/A	https://www.ala.org/alsc/about/alsc/edi-within-alsc-implementation-tf
ALSC - Alena Rivers	BIPOC Discussion Group	The BIPOC Discussion Group convenes face-to-face at each in-person conference and virtually, when conferences are unable to be held in person. The purpose of the BIPOC Discussion Group is to provide a safe, welcome, and open space for ALSC members who identify as Black, Indigenous, and/or People of Color to discuss specific experiences in the profession and the Association. The Discussion Group will benefit ALSC by 1) demonstrating ALSC's commitment to creating a welcoming, inclusive, and safe environment for all members, while acknowledging the inequity that makes a group like this necessary, and 2) supporting ALSC's ongoing work to continually adopt inclusive, equitable practices through feedback from the group's participants.	ALA Annual Conference and other related conferences	BIPOC Members of ALSC	To foster connections and help build networks among underrepresented groups within ALSC.	30-60 discussion group participants	30-60 participants per list five discussion groups	https://www.ala.org/alsc/bipoc-black-indigenous-and-people-color-discussion-group
AMERICAN LIBRARIES								
	Sandra Sinforoso, editor and publisher and Terra Dankowski, managing editor and ODOLIS liaison	Our work is reflective of efforts to embed EDJS in all stories, not just in special features or during cultural observance months. As journalists and employees living up to ALA's core values, we strive to include individuals of diverse backgrounds and viewpoints as sources, columnists, interview subjects, and contractors in our magazine, podcast, online stories, and curated content. Our commitment to EDJS means that we do run stories on timely issues related to equity as it intersects with the profession. Recent examples include coverage of people with disabilities navigating library closures during the pandemic, the increase of independent Black archives, as well as that 9/11 had on Muslim and Arab-American librarians, and inclusive programming and outreach to bridge the digital divide.	Ongoing	ALA membership and nonmembers (who have entry points via public channels like the website, podcast, webinars, etc.)	The stories we tell are relevant, informative, representative, and actionable. In sharing the experiences and expertise of others, we empower members to be EDJS stewards in their own communities by drawing from the best practices and successes that we			americanlibraries.org
Booklist	Formed new diverse Advisory Board	Formed new representative Advisory Board	Nov-20	All Booklist readers and subscribers	The new advisory board will provide guidance to all aspects of EDJS in all areas of Booklist print and digital and all derivative products	All Booklist readers and subscribers		https://www.booklistonline.com/staff
Booklist	Launched new diverse patron-facing magazine named Booklist Reader	Launched a new digital publication focused on diverse reading recommendations for all audiences	Launched September 2021 and is published monthly	All readers, library patrons, library workers, he public	Benefits include reading recommendations, interviews and other content the audiences might not otherwise discover	Library patrons and the public	All Booklist subscribers	https://booklistreader.booklistonline.com/html5/reader/production/default.aspx?pubname=&pubid=044586874033483826c66d3a6f8967
Booklist	Booklist Blog: Reading for Change: Booklist-Recommended Antiracism Titles for All Ages	The events of the past several days are fresh, but these books—and these systemic problems: white supremacy, police brutality, centuries of violence against Black people, carried out time and again by white people—have been here. And we'd be naive to believe that by reading books alone we might somehow upend that reality. We cannot rely on our magpies to do the work for us, but in the hopes they might serve as catalysts for the self-reflection and group discussion that often prove effective antiracist action, we have developed a list of our own. For those committed to this journey—the reading and the subsequent action—below is a start.	May-20	Adult, Youth, and Audio readers and listeners, library works, library patrons and the public	Educational reading, both non-fiction and fiction titles	All visitors to Booklist's blog and website and cross promoted to i Love Libraries and American Libraries	Continuing visitors per list five discussion groups	https://www.booklistonline.com/Reading-for-Change-Booklist-Recommended-Antiracism-Titles-for-All-Ages-Brian-Branzholik/pid-9731193
Booklist	Book Links: Athlete Activists by Angela Leeper	These athletes regularly demonstrate their abilities across stadiums, fields, courts, and other sporting venues, many have also taken advantage of the spotlight and used their talents, voices, and actions to break racial, ethnic, and gender barriers, promote social justice, and advocate for accessibility for future generations. The titles below feature athletes who have made their physical achievements and their personal activism.	September 2021 issue	Booklist subscribers, students and teachers who apply this into classroom curricula	Education supporting activism and social justice	Booklist subscribers	All Booklist subscribers	https://www.booklistonline.com/Classroom-Connections-Athlete-Activists/pid-9727060
Booklist	Book Links: Celebrating Banned Books Week with Something Happened in Our Town by Pat Scallan	This year's banned books week is September 28-October 4 and our keywords are national antiracism for young people's literature, it is the inaugural honorary chair. "Books Unite Us: Community Divides Us" is the theme of this year's celebration, and it is especially pertinent since 8 of the Top 10 Most Challenged Books in 2020 dealt with racial issues. The book ranked number 6 on the list is Something Happened in Our Town (2018), written by Marianne Celano, Marietta Collins, and Ann Howard, and illustrated by the author's family.	September 2021 issue	Booklist subscribers, students and teachers who apply this into classroom curricula	Education supporting activism and social justice	Booklist subscribers	All Booklist subscribers	https://www.booklistonline.com/Classroom-Connections-Celebrating-Banned-Books-Week-with-Something-Happened-in-Our-Town/pid-9732053
Booklist	Webinar: Anti-Racist Education: Building Your Inclusive Collection & Curriculum	Librarians and educators will learn how to use both nonfiction and fiction books in their anti-racism collections and classroom curriculums. Julia Torres, a teacher librarian in Denver Public Schools and a co-founder of #DiversityTeas, will lead a conversation with authors Dr. Crystal M. Fleming (Rise Up: How You Can Join the Fight Against White Supremacy), Bethany C. Morrow (So Many Beginnings: and Aminah Ma Safi (Travelers Along the Way: A Robin Hood Remix). This conversation will address how educators can create more inclusive, representative and equitable curriculums by incorporating newly published works into school and library collections. Attendees will receive a recording of the webinar.	6 Sep-21	Booklist webinar attendees	Librarians and educators will learn how to use both nonfiction and fiction books in their anti-racism collections and classroom curriculums.	Webinar attendees	Webinar attendees and those who view the archived webinar.	https://ala.sweet's.com/us/en/librar/283163d3d2m0EPL302h-3oc7Lw60wG4c6Hm027yqC6P3jllv4w4e8L4vll7H3a8W-13t4rTfme163112494800
Booklist	Booklist Audio: Listen Up: Social Justice Audio Selections for Book Groups by Heather Booth, published July 2021	The audio format increases the intimacy and impact of these books, and each offers a jumping-off point for spirited and reflective conversations.	July 2021 issue	Booklist subscribers	Educational listening, both non-fiction and fiction titles	Booklist subscribers	Booklist subscribers	https://www.booklistonline.com/Listen-Up-Social-Justice-Audio-Selections-for-Book-Groups/pid-9730991
Booklist	Adult Books: Reading Together: Recent Social Justice Choices for Book Groups by Annie Bostrom and others, published July 2021	We hope you're enjoying books that we're recommending to you. We're also recommending titles that explore such social justice issues as racism, sexism, climate change, immigration, and body image from various perspectives, whether factual or imaginative, bold or sensitive, humorous or lyrical. The nonfiction titles below are works of history and analysis, memoir, and essay collections, while the fiction titles cover a broad emotional spectrum, from heartwarming to romantic and from witty to gripping. Written by debut authors and longtime favorites, these vital and relevant books now available will engage readers and create lush and significant discussions.	July 2021 issue	Booklist subscribers	Library workers and book groups and clubs looking to share social justice titles	Booklist subscribers	Booklist subscribers	https://www.booklistonline.com/Reading-Together-Recent-Social-Justice-Choices-for-Book-Groups/pid-9730924
Booklist	Guide to East Asian and East Asian American Historical Fiction	From the time of the pandemic, the US has seen a sharp rise in the number of Asian Americans. Despite a North American presence older than the nation itself (Filipino sailors landed in California in the 18th century), and centuries of contributions that have shaped daily American life—railroads, agriculture, technology, books—Americans of Asian descent continue to be attacked for being "other." The high-profile Atlanta murders in March of eight people, including six women of Asian descent, resulted in greater awareness and growing support of Asian and Pacific American communities, but anti-Asian hate crimes continue to escalate, including thousands more attacks that remain unreported.	May 2021 issue	Booklist subscribers and AL Live readers	Educational reading, both non-fiction and fiction titles	Booklist subscribers and AL Live readers	Booklist subscribers and AL Live readers	https://americanlibrariesmagazine.org/blog/the-2020-recommended-reading-asian-pacific-american-heritage-month/
Booklist	Book Links: Indian Residential Schools: A Shameful Story by Kay Weisman	In recent years, North American Indigenous creators have begun documenting their experiences in these schools as a way of healing the personal and intergenerational trauma that persists even today. The titles below, directed at a wide range of audiences, should help readers to engage with these experiences and provide some understanding of their historical and contemporary context.	September 2021 issue	Booklist subscribers	Librarians and educators learn how to use this content in their collections and classroom curriculums.	Booklist subscribers	Booklist subscribers	https://www.booklistonline.com/Classroom-Connections-Indian-Residential-Schools-A-Shameful-Story/pid-9732086
COMMUNICATIONS & MARKETING OFFICE								
Communications and Marketing Office - Stephanie Hweah, Director	Love My Librarian Award	The Love My Librarian Award invites library users to recognize the accomplishments of exceptional public, school, college, community college, or university librarians. Each year up to 10 librarians are selected. Each winner receives a \$5,000 cash award in recognition of their outstanding service to their community.	Annual award started in 2008. Award will continue as long as funding allows.	Although this award is open to all librarians, regardless of their race, ethnicity, or disability status, the award committee makes a concerted effort to ensure each winner cohort includes a diverse representation of librarians. For example, in 2020 winners included two Asian librarians, one Latina, and one Native American. This group also included one of the first honorees with a visible disability.	Each winner receives \$5000 in prize money and \$700 travel stipend to attend the award ceremony (in years when the award has been celebrated virtually, three funds have been given as unrestricted gifts to winners' libraries).	10	130	http://www.ilovelibraries.org/lovelmylibrarian
CHOICE	Choice, Mark Cummings	Toward Inclusive Excellence explores issues of equity, diversity, and inclusion, particularly, though not exclusively, as they affect the academic library community. This web-based service incorporates weekly blog posts as well as occasional podcasts and webinars, in which contributors explore the intricacies of racial identity as they relate to academic libraries, and address issues such as academic excellence, social justice, and equity.	Ongoing. Content published weekly	Information professionals, undergraduates, and faculty seeking to understand racism from new perspectives and to promote racial justice on their campuses.	Development of a pool of knowledge and actionable resources for those seeking to understand racism from new perspectives and to promote racial justice on their campuses.	Not quantifiable	Over 5,000 site visits, inception (4/1/21) to date	https://www.choice360.org/toward-inclusive-excellence/
Core: Leadership, Infrastructure, Futures, Brooke Morris-Chott, Advocacy & EDI Program Officer	Preservation in Action (PIA)	Promotes an understanding of the importance of preservation while engaging with cultural heritage collectors in ALA conference locations.	Annually (during ALA annual)	ALA Annual attendees, the local communities served during event, and general public.	Conference attendees gain/further preservation skills and knowledge of the cultural heritage of the community where event is held; the local communities benefit from having a community collection preserved; and the general public learns about the culture and community collection being preserved and gains tools they can use on their own personal and family collections.	15 attendees and community/public at large	60 attendees and community/public at large	https://www.ala.org/con/af/program/pia
Core: Leadership, Infrastructure, Futures, Brooke Morris-Chott, Advocacy & EDI Program Officer	Preservation Week (a Core/ALA public awareness)	Promotes personal, family, and community preservation and conservation as well as cultural and community heritage.	Annually at the end of April	general public	Gain knowledge of preservation and conservation and learn more about preserving their own collections. Gain a better understanding of their communities and their community culture and heritage.	public at large	public at large	https://www.ala.org/alsc/preservationweek

Name of Unit or Division & Contact person	Name of EDIS Initiative, Program, Activity, Service or Tool	Brief Description/Summary of EDIS Initiative, Program, Activity, Service or Tool - Please limit to no more than three sentences.	Dates (approx. start and projected end, if relevant)	Who benefits? (e.g., BIPOC US students, Library staff serving incarcerated or detained individuals)	How do they benefit? (e.g., scholarships or grants of \$K amount, Mentorship for K periods, grant... free division membership or conference registration equal to \$K amount (etc.). Please name concrete benefits in terms of funds, time, access to specific offerings, etc.)	How many will benefit this year (FY23)?	How many beneficiaries since the program began?	URL where further information can be found
Core: Leadership, Infrastructure, Futures, Brooke Morris-Chott, Advocacy & EDI Program Officer	Preservation Outreach Committee	Develops, facilitates, maintains and expands preservation focused outreach and service on behalf of Core through the Preservation Week and Preservation in Action Initiatives.	N/A	Core and all ALA members and general public through programming and initiatives such as PA and Preservation Week.	ALA and Core members learn more about the preservation field of librarianship and collection management (particularly special collections). Public gains knowledge about preservation and maintaining their own personal and community collections.	N/A	N/A	https://www.ala.org/core/member-center/committees/preservation-outreach-committee
Core: Leadership, Infrastructure, Futures, Brooke Morris-Chott, Advocacy & EDI Program Officer	Advocacy Coordination Committee	Informs and advises Core members on the advocacy needs of libraries and library workers within the areas of library leadership, cataloging, metadata, technical services, library technology, archiving, and preservation and conservation; identifies, evaluates, and makes recommendations on issues, legislation, and services concerning the area of focus for Core members. Provides a forum within Core to share information and legislative analysis of current and impending federal laws and regulations to keep Core members apprised of current issues affecting libraries.	N/A	Core members, librarians, libraries, and institutions	State and local libraries are provided with advice and offered collaborations and assistance to state and local library entities when federal legislation has implications at the state and local level.	N/A	N/A	https://www.ala.org/core/member-center/committees/advocacy-coordination-committee
Core: Leadership, Infrastructure, Futures, Brooke Morris-Chott, Advocacy & EDI Program Officer	Diversity and Inclusion Committee	Establishes and maintains anti-racism, diversity, and inclusion as fundamental principles of Core; articulates the desired facets of anti-racism, diversity, and inclusion within Core; proposes appropriate goals for anti-racism, diversity, and inclusion in Core membership, participation, and programming and metrics for measuring success; advises and coordinates with other Core committees, project teams, and the governing board on strategies to meet these goals; coordinates with other groups within ALA on EDI issues in the library workplace.	N/A	Core members	Core members gain the necessary training and resources needed to practice and maintain EDI and EDI related programming and initiatives within their libraries, institutions, and museums.	N/A	N/A	https://www.ala.org/core/member-center/committees/diversity-and-inclusion-committee
Core: Leadership, Infrastructure, Futures, Brooke Morris-Chott, Advocacy & EDI Program Officer	International Relations Committee	Leads and coordinates international relations activities. Engages with counterpart groups of librarians abroad, particularly those in Core's area of interest, and encourages participation in international conferences and other activities. Reviews and recommends to the Core Board candidates for IFLA section standing committees. Reviews and awards the Online Course Scholarship for Library Professionals from Developing Countries.	N/A	Core members, library school students, international librarians	International members of Core are offered support and resources in the areas that Core focuses on; provides a state of Core candidates for IFLA section standing committees. In years the division is asked to provide them, and administers the Online Course Scholarship for Library Professionals from Developing Countries.	N/A	N/A	https://www.ala.org/core/member-center/committees/international-relations-committee
Core: Leadership, Infrastructure, Futures, Brooke Morris-Chott, Advocacy & EDI Program Officer	Access and Equity Section	Dedicated to advocacy and equity in areas such as accessibility, copyright, dismantling systemic racism, equity of access, open access, net neutrality, privacy, and representative collections in all types of libraries.	N/A	Core and ALA members	Gains support in programming and training in equity, diversity, and inclusion, both within the division and the profession.	N/A	N/A	https://www.ala.org/core/member-center/factions/access-and-equity
Core: Leadership, Infrastructure, Futures, Jenny Levine, Director of Advocacy, Connections, and Engagement	Women, Non Binary, and Trans Workers in Library Technology Interest Group	Provides a valuable place and voice for women, non-binary, and trans workers within library technology, voices that are often ignored or overlooked.	N/A	Library workers who identify as female, non-binary, and trans	Support, a safe space, and a platform for discussing issues relevant to library workers who work within library technology and identify as female, non-binary, and trans.	N/A	N/A	https://www.ala.org/core/member-center/interest-groups/women-non-binary-and-trans-workers-in-library-technology
Core: Leadership, Infrastructure, Futures, Jenny Levine, Director of Advocacy, Connections, and Engagement	Women, Non Binary, and Trans Administrators Interest Group	Provides a forum for discussion of problems of particular concern to women, non-binary, and trans people in administrative positions.	N/A	Library administrators who identify as female, non-binary, and trans	Support, a safe space, and a platform for discussing issues relevant to library administrators who work within library technology and identify as female, non-binary, and trans.	N/A	N/A	https://www.ala.org/core/member-center/interest-groups/women-non-binary-and-trans-administrators
Core: Leadership, Infrastructure, Futures, Jenny Levine, Director of Advocacy, Connections, and Engagement	Open Access Interest Group	Brings together library staff interested in open access (OA) publishing, including, but not limited to: OA and collection development; transformative agreements; library sponsored author funds; and OA library publishing. The interest group will keep members informed of new policies and practices in this area.	N/A	Library workers interested in OA publishing	Learn about new policies and practices in OA publishing.	N/A	N/A	https://www.ala.org/core/member-center/interest-groups/open-access
Core: Leadership, Infrastructure, Futures, Jenny Levine, Director of Advocacy, Connections, and Engagement and Brooke Morris-Chott, Advocacy & EDI Program Officer	Christan Larew Memorial Scholarship in Library and Information Technology	The Core/Christian (Chris) Larew Memorial Scholarship provides tuition help for library school students who want to follow a career in the library and information technology field and who demonstrate academic excellence, leadership, and a vision in this area. It provides \$3,000 for studying in an ALA Accredited Master of Library Science (MLS) program.	N/A	Library school students interested in a career in library and information technology	\$3,000 for studying in an ALA Accredited MLS program	N/A	N/A	https://www.ala.org/core/wards-scholarships/christian-larew-memorial-scholarship
Core: Leadership, Infrastructure, Futures, Jenny Levine, Director of Advocacy, Connections, and Engagement and Brooke Morris-Chott, Advocacy & EDI Program Officer	Core/DOLC Spectrum Scholarship in Library and Information Technology	Actively recruits and provides scholarships to American Indian/Alaska Native, Asian, Black/African American, Hispanic/Latino, Middle Eastern and North African, and/or Native Hawaiian/Other Pacific Islander students to assist them with obtaining a graduate degree and leadership positions within the profession and ALA. The Core/DOLC Spectrum Scholarship in Library and Information Technology is designed to address the specific issue of under-representation of racially and ethnically diverse librarians within library technology.	N/A	BIPOC graduate students who wish to pursue leadership positions within the profession	Each scholar receives \$5,000 from ALA to combat the rising cost of graduate education, as well as \$1,500 to attend the specific annual conference held during the ALA Annual Conference.	N/A	N/A	https://www.ala.org/core/wards-scholarships/spectrum-scholarship
Core: Leadership, Infrastructure, Futures, Jenny Levine, Director of Advocacy, Connections, and Engagement and Brooke Morris-Chott, Advocacy & EDI Program Officer	Online Course Scholarship for Library Professionals from Developing Countries	Helps library professionals from developing countries stay current with the latest trends and developments the Core areas of focus specified below and enhance their professional knowledge and skills in librarianship and information science.	N/A*Please note: N/A Library professionals from developing countries		One free seat per Core online continuing education course session	N/A	N/A	https://www.ala.org/core/wards-scholarships/online-course-scholarship
CHAPTER AND INTERNATIONAL RELATIONS								
RD/Delin Guerra	ALA-FLA Free Pass Program to Guadalajara Book Fair	Support 150 members each year to Guadalajara Book Fair to review and buy Spanish language materials	End of Nov Start of Dec every year	Librarians gain experience and knowledge on Spanish publishing. Spanish-speaking populations across U.S. benefit from new material	\$100 travel stipend provide by ALA to each member	150 if all slots are taken	3,000 members over 21 years. Hundreds of thousands of Spanish speaking users of libraries in U.S.	https://www.ala.org/about/offices/nr/zwarc/activities/guadalajara-book-fair-text?text=7e630de6d6e120f6e323b6c1a0e320e&PDN%20ID=653330cedd4a
RD/Michael Dowling	Sharjah International Library Conference	Yearly conference in Sharjah, UAE for members and non-members from the Middle East region (and South Asia, Africa)	November 9-11	Members and non-members able to attend an ALA event in their region	NA		2,000 members and non-members over eight years.	http://www.difa.com/
CRD/Maribel Colbert	ODLOS EDI Trainings	CRD staff part of training staff for EDI	Throughout the year	Attendees of training sessions at Chapter conferences, library in-service and CE events	NA		300 since CRD started assisting in FY20	https://www.ala.org/advocacy/diversity/continuing-education/trainings-strategic-planning
DEVELOPMENT								
Tracie Hill and Anne Manly	Let Our Legacy Be Justice Grant Initiative	Applied for and received \$2M grant from Mellon Foundation to support ODLOS administration and general programming related to reaching BIPOC library communities and staff, as well as currently incarcerated readers and learners.	Through end of FY22	BIPOC Library users, staff, and incarcerated readers and learners.	advocacy, programs and services			
EDITIONS - PUBLISHING UNIT								
Edtions, Rachel Chance	EDIS content represented across the product line	Book: <i>Libraries and Incarceration: Identifying Barriers, Strengthening Access</i> by Jeanie Austin	Due to publish 10/25/21	People who are or have been incarcerated or detained and their families; people from groups heavily impacted by or at risk of incarceration or detention: Black, Indigenous, and people of color, LGBTIQ people, and people who are in poverty; library staff serving these populations; LIS students; and people engaged in restorative justice and prison reform and abolition initiatives.	Library staff and LIS students bring a better understanding of carceral systems in the United States to their work to better support and protect the safety of incarcerated and detained populations.	The initial print run is 1,000 copies, with a little over half expected to sell in the first year. This book will also be available as an e-book through libraries.	n/a	https://www.alastore.ala.org/hai
Edtions, Rachel Chance	EDIS content represented across the product line	Book: 1) Cultural Humility (Special Report series) by David A. Hurley, Sarah R. Kostelny, and Tom Townsend and 2) <i>Let Our Legacy Be Justice</i>	1) Due to publish early 2022 and 2) published	Public, school, academic, and special library staff and the BIPOC people in the communities they serve.	The most important barrier to BIPOC library users and potential library users. <i>Let Our Legacy Be Justice</i> cultural	The initial print run is 1,800 copies, with a little over half expected to sell in the first year. One or both books available as an e-book through libraries.	n/a	https://www.alastore.ala.org/cuhum and https://www.alastore.ala.org/letourlegacy
Edtions, Rachel Chance	EDIS content represented across the product line	Book: <i>Foundations of Social Justice</i> by Nicole A. Cooke	Due to publish mid-to-late 2022	Library staff serving children, and all who present story times.	Library staff serving children will be guided in integrating anti-racism work into their professional practice through adapted story times, tools for self-reflection, and discussion starters.	The initial print run is 440 copies.	n/a	https://www.alastore.ala.org/foundations
Edtions, Jamie Santoro	EDIS content represented across the product line	Book: <i>Let's Talk About Race in Storytimes</i> by Jessica Anne Bratt	Due to publish: 1/10/22	Library staff serving children and teens in both public library and K-12 educational settings.	Library workers will be better informed and prepared to serve members of the autistic community.	Anticipated FY22 sales: 440 copies.	n/a	https://www.alastore.ala.org/letstalkaboutrace
Edtions, Jamie Santoro	EDIS content represented across the product line	Book: <i>Library Programming for Autistic Children and Teens</i> by Amelia Anderson.	Publication date: 4/22/21	Library workers	Library workers will be more prepared to serve members of the autistic community.	Anticipated FY22 sales: 440 copies.	n/a	https://www.alastore.ala.org/actoprograms2
Edtions, Jamie Santoro	EDIS content represented across the product line	Book: <i>Library Programming for Adults with Developmental Disabilities</i> by Barbara Klipper and Carrie Banks	Publication date: 6/21/21	Library workers	Library workers will be more prepared to serve members of the autistic community.	Anticipated FY22 sales: 440 copies.	n/a	https://www.alastore.ala.org/DDprograms
Edtions, Jamie Santoro	EDIS content represented across the product line	Book: <i>Asian Americans in Story</i> by Sarah Park Dahlin and Paul Lai	Due to publish: 4/9/2022	LIS instructors, educators, librarians, students, and scholars.	LIS instructors, educators, librarians, students, and scholars will better understand Asian American children's and young adult literature in a historical, sociopolitical, and cultural context.	Anticipated FY22 sales: 440 copies.	n/a	https://www.alastore.ala.org/story

Name of Unit or Division & Contact person	Name of EDISJ Initiative, Program, Activity, Service or Tool	Brief Description/Summary of EDISJ Initiative, Program, Activity, Service or Tool. Please limit to no more than three sentences.	Dates (approx. start and projected end, if relevant)	Who benefits? (e.g., BIPOC LIS students, Library staff serving incarcerated or detained individuals)	How do they benefit? (e.g., scholarships or grants of \$K amount, Membership for X period, grant - free division membership or conference registration equal to \$K amount (etc.)). Please name concrete benefits in terms of funds, time, access to specific activities, etc.	How many will benefit this year (FY22)?	How many beneficiaries since the program began?	URL where further information can be found
Editions, Jill Hillemeier and Rob Christopher	Promotion of the EDISJ content represented across the product line	31 covered in the catalog featuring EDI books and letters from COLOS 2) Landing page on ALA Store linking to EDI books and ALA Graphics products 3) eblast feature EDI books	Featured in FW22 Catalog and August 2021 eblast - ongoing	Library staff and US instructors/students who are looking for resources on EDI topics.	Provide essential resources for libraries to further the core values of equity, diversity, inclusion, literacy, and outreach.	Catalog will reach 90k+ members, potential members, and customers with this information in FY22. Eblasts will reach 120k members, potential members, and customers with this information in FY22.	N/A	https://www.alastore.ala.org/EDI https://alaeditions.org/catalog01/
Editions, Rachel Chance	EDISJ content represented across the product line	Book: <i>Foundations of Intellectual Freedom</i> by Emily J.M. Knox	His scholars, instructors, and students.				n/a	https://www.alastore.ala.org/foundations
Editions, Rachel Chance	EDISJ content represented across the product line	Book: <i>Media Literacy for Justice: Lessons for Changing the World</i> by Belinda S. De Abreu					n/a	https://www.alastore.ala.org/ml4j
Editions, Rachel Chance	EDISJ content represented across the product line	Book: <i>Serving the Underserved: Strategies for Inclusive Community Engagement</i> edited by Catherine Bonhold					n/a	https://www.alastore.ala.org/underserved
Editions, Rachel Chance	EDISJ content represented across the product line	Book co-published with the Society of American Archivists: <i>Decolonial Archival Futures</i> (Archival Futures series) by Krista McCracken and Skyler Storm Hogan			Decolonial archival practices involve thinking about and consciously changing how historical knowledge is produced, communicated, and preserved. And though it is especially critical that scholars and archivists who work with records by and about Indigenous people critically consider the implications of their work, this perspective is an essential one for all members of the profession. By examining archival practices that push against and		n/a	https://www.alastore.ala.org/decarcut
Editions, Rachel Chance		Publication of Prison Library Standards revision						
Editions, Rachel Chance	EDISJ content represented across the product line	Two-volume set of Special Reports on Black and African Americans: experiences in libraries: 1) <i>Narratives of Unsettling/Unshattering: Reckoning with the History of Libraries and the Black and African American Experience</i> by Tracy Oberler and Amanda L. Folk and 2) <i>Narratives of Dis/engagement: Exploring Black and African American Students' Experiences in Libraries</i> by Amanda L. Folk and Tracey Oberler	First Report due to publish late 2021 or early 2022.				n/a	First book in the set: https://www.alastore.ala.org/sr1/
ALA Editions/ALA Neal-Schuman, Samantha Kundert, Managing Editor	Updated Author Guide	Author guide used by potential and current authors and freelance copy editors and proofreaders was updated to include personal pronoun usage examples and OODS resources. Authors to reference while creating content that reflects the unique experiences and backgrounds of librarianship.	Ongoing	Readers, library staff				https://alaeditions.org/wp-content/uploads/ALA-Author-Guide_2020.pdf
Editions, Rachel Chance	EDISJ content represented across the product line	Book: <i>Power Lines: Connecting with Teens in Urban Communities Through Media Literacy</i> , by Jemeka Anderson and Kelly Czarnack	Due to publish early 2022.	Minoritized and economically disadvantaged youth in urban communities and the library staff who serve them.	Library staff who serve teens in urban communities will be able to provide innovative and transformative learning experiences that encourage the development of essential information and digital literacies.		n/a	https://www.alastore.ala.org/powerlines
GRAPHICS								
Rachel Johnson, ALA Graphics	EDI content represented across the product line	Posters, bookmarks, and other incentives, including those created in collaboration with units and affiliates such as ALSC, OPL, ABOJ, BCALA, and Core to ensure that all library users can see themselves and their communities in promotional materials and incentives.	Ongoing	All library users, supporters, and workers, especially in school and public libraries, and library staff who seek diverse tools for promoting reading and literacy. This includes materials for special events such as NW, Banned Books Week, Dia, and National Conference of African American Librarians and for national monthly celebrations including American Indian Heritage, Asian/Pacific American Heritage, Black History, Hispanic Heritage, and Women's History.	Diverse products. \$900 in royalties to ABOJ in FY21. \$200 in royalties to BCALA/NCAAL in FY21. \$1,155 in royalties to Core to be used for Core memberships for library workers in			Alastore.ala.org and bit.ly/GraphicGiftShop

MEMBER RELATION SERVICES - MRS

Graphic Novels & Comics Round Table & BCALA Tina Coleman - Staff Liaison	Black Lives Matter, Black Literature Matters Comics Reading List & supplemental lists	This list of 50 comics titles for Juvenile, Teen (YA), and Adult audiences is centered on Black creators, Black stories, and Black histories for all ages. The goal of this list is not to be a prescriptive spectrum of all the subject or format content out there in the landscape of Black stories or comics. Rather, this is a step, another step, towards building collections and conversations that spark hope, demand justice, address erasure, and agitate for learning - using both sides of our brains through words and pictures. Because when "Black lives and Black stories are lost"	9/23/2020 - present	Black comics creators, publishers, and other comic industry professionals, BIPOC communities, library staff serving BIPOC communities	The stated goal is to build these lists or collection development tools to highlight and raise Black voices and stories, highlight and celebrate Black creators (both within libraries and in the comics community).	unknown	unknown	https://www.ala.org/11/pnrc7000/black-lives-matter-black-literature-matters-comics-reading-list
MRS, Melissa Wasting - Staff	ALA Connect Live	Patty Wong is dedicating the November 2021 ALA Connect Live to showcasing best practices in advancing EDI efforts within library communities. The panelists will also discuss how intellectual freedom challenges can become a battleground for these issues.	November 18, 2021	This event is open to all library workers	The expected outcome is that attendees will have some best practices they can apply within their libraries.	We expect 300 attendees	N/A	https://www.ala.org/membership/ala-connect-live-series
Graphic Novels & Comics Round Table, Tina Coleman - Staff Liaison	Will Eisner Graphic Novel Grants for Libraries 3 Growth Grants & 1 Innovation Grant awarded annually	The Eisner Awards are meant to support "library programs, services, and collections that promote graphic novels to patrons and communities". Three grants are awarded annually - 2 growth grants awarded to libraries that have existing comics collections and programming that would like to "level-up" what they are doing, and 1 innovation grant awarded to a library that isn't currently offering programming or highlighting comics but wants to. Each grant provides funds for programming, professional development (travel to ALA Annual Conference), collection development, as well as collections of Will Eisner's works and a selection of the Eisner Award nominated titles for that year.	2014 - 2023 (agreement with Eisner Foundation expires in 2023, as possible renewal)	Library staff	Each grant includes: \$1,000 for graphic novel program, \$1,000 travel stipend for ALA Annual Conference, \$2,000 voucher with Diamond Comic Distribution, as well as collections of Will Eisner's works and a selection of the Eisner Award nominated titles for that year (about \$3,000 value)	Three projects will receive grants this year	19	https://www.ala.org/11/pnrc7000/eisner

OFFICE FOR DIVERSITY, LITERACY AND OUTREACH SERVICES

OODS - Kristin Lohrd	OODS - Continuing Education: EDI Trainings	The Office for Diversity, Literacy and Outreach Services (ODLOS) offers a robust continuing education portfolio, including trainings, strategic planning, and webinars in our focus areas of equity, diversity, and inclusion, literacy, and outreach. Our trainings are developed through the lens of social justice and libraries.	ongoing	Library workers in various types of library institutions	Library workers receive foundational training on equity, diversity, inclusion to improve their self-awareness and systems analysis and ultimately, their library services and policies.	Based on numbers reached during FY21, we anticipate training approximately 1500 library workers in FY22.	Thousands	https://www.ala.org/advocacy/diversity/continuing-education/trainings-strategic-planning
OODS - Kevin Strouder	OODS - EDI Assembly	The purpose of the EDI Assembly is to provide a forum for all groups within ALA and ALA-affiliated organizations working on initiatives related to equity, diversity, and inclusion to discuss their activities, identify opportunities for collaboration and coordination, and explore new initiatives related to the association's strategic direction for equity, diversity, and inclusion.	July 1, 2021 - June 30 - 2022	ALA members and affiliates	A forum for ALA members and NALICs representatives to share resources and share areas of improvement with regard to EDI at ALA.	141 members	150 as of September 13	https://www.ala.org/aboutala/edi-assembly
OODS - Kristin Lohrd	OODS - Libraries Respond	The ALA Office for Diversity, Literacy and Outreach Services has created Libraries Respond as a space for us to help keep current events in conversation with libraries! Ongoing work is and committed to equity, diversity, and inclusion. This page is a resource for the library community to share information, find resources, and connect as they serve their communities.	ongoing	Library workers who are looking to address current events.	Resources and examples on how library workers can address current events.	n/a	130,464 page views since 2017	https://www.ala.org/advocacy/diversity/libraries-respond
OODS - Amber Hayes	OODS - Rural Libraries Summit	Black Rural Native and Tribal Libraries of All Ethnicities Committee (INTL-DAM) invited rural library workers to the inaugural Rural Libraries Summit. During this virtual two-day summit, library workers had the opportunity to hear from innovative initiatives happening at libraries across the United States, share challenges and successes, and network with peers. The summit was held on 7/26.	May 25-26	Rural library workers who are looking to connect.	Networking opportunities, opportunities to hear directly from ALA leadership, new resources from other library workers	120 attendees	120 rural library workers so far.	https://www.ala.org/advocacy/diversity/2021-rural-summit
OODS - Kevin Strouder	OODS - Spectrum	The Spectrum Scholarship Program actively recruits and provides scholarships to American Indian/Alaska Native, Asian, Black/African American, Hispanic/Latino, Middle Eastern and North African, and/or Native Hawaiian/Other Pacific Islander students to assist them with obtaining a graduate degree and leadership positions within the profession and ALA.	Applications open September 1 - March 1.	BIPOC library students.	Scholarship funds and professional development opportunity at ALA Annual	60 scholars	Over 1,300 students	https://www.ala.org/advocacy/spectrum
OODS - Kristin Lohrd	OODS - Building Cultural Proficiencies for Racial Equity Task Force	The task force is charged to create a framework for cultural proficiencies in racial equity that can be used in public and academic libraries through: - Scanning the environment, including review of relevant documents to identify literature and similar statements and frameworks related to racial equity; - Drafting the framework; - Seeking comment from stakeholders and the library community on the draft, and revising as needed.	Ongoing, started January 2020	Public and academic libraries, at the individual and organizational levels	Access to aggregated survey data on racial equity and equity in libraries and a framework that libraries can use for strategic planning and assessment; hiring, retention and other practices; and building accountability for eradicating white supremacy in their services	TBD (framework has not been released, nor have survey results)	The task force currently includes 10 volunteers	https://www.ala.org/news/member-news/2020/05/act-arl-odds-and-ala-announce-joint-cultural-competencies-task-force
OODS - Jennifer Shimoda (Chair) - Kevin	OODS - Committee on Diversity DEI Scorecard	The DEI Scorecard promotes accountability and transparency in gauging institutional performance on the measures of DEI presented in rubric format along with supplemental reflection questions. Embeddedness of DEI into the Culture and Climate of the Organization; Training and Education; Recruitment, Hiring, Retention, and Promotion; Budget Priorities for DEI; and Data Practices. Development of the DEI Scorecard was informed by ALA's Core Values of Librarianship, ALA's Diversity Standards, Cultural Competency for Academic Libraries, and other report card/scorecard measures of DEI performance. The DEI Scorecard can be used as-is or adapted to accommodate local context.	n/a	Library workers have a template to evaluate their DEI efforts	n/a	n/a	n/a	https://www.ala.org/news/member-news/2021/07/ala-committee-diversity-announces-diversity-equity-and-inclusion-dei-scorecard

OFFICE OF INTELLECTUAL FREEDOM - OIF

Office for Intellectual Freedom Leroy C. Merritt Humanitarian Fund (ALA Related Organization) Deborah Caldwell-Stone	Direct grants in aid to library workers experiencing employment discrimination due to race, sex or gender identity, ethnicity, or religion OR due to defense of intellectual freedom	1973 to present	Library workers	Funding for legal fees, living expenses as needed	Estimated: 3-4 grantees	More than 30	Merrittfund.org
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Name of Unit or Division & Contact person	Name of EDISJ Initiative, Program, Activity, Service or Tool	Brief Description/Summary of EDISJ Initiative, Program, Activity, Service or Tool - Please limit to no more than three sentences.	Dates (approx. start and projected end, if relevant)	Who benefits? (e.g., BIPOC LIS students; Library staff serving incarcerated or detained individuals)	How do they benefit? (e.g., scholarships or grants of \$K amount; Mentorship for K period; grant... free division membership or conference registration equal to \$K amount (etc.). Please name concrete benefits in terms of funds, time, access to specific offerings, etc.	How many will benefit this year (FY22)?	How many beneficiaries since the program began?	URL where further information can be found
COMMITTEE ON THE STATUS OF WOMEN IN LIBRARIANSHIP								
Committee on the Status of Women in Librarianship (COSWL)	1. Harassment of Library Workers 2. Harassment of Library Workers Who are Part of Transgender Community	Series of webinars to address stated issues	Start: Nov 2021 – June 2022	Library staff, boards, etc.	Gain knowledge and skills	Unknown	NA	Not yet available
YOUNG ADULT LIBRARY SERVICES ASSOCIATION								
YALSA – Tammy Dillard-Steels	History of the four EDI Taskforce Analysis	YALSA Board is analyzing the history of the four EDI taskforce to identify action.	On-going	YALSA Membership.	These actions will lead to the culture shift needed to become a more inclusive association.	3800	Unknown	https://www.ala.org/ala/litres/ala.org.yalsa/files/content/yalitsymposium/programs/history%20of%20four%20EDI%20Taskforce%20revision%202.pdf
YALSA – Tammy Dillard-Steels	Evaluating Volunteer Resources Taskforce	This volunteer team will collaborate to evaluate and update volunteer resources for inclusion and diversity and form recommendations for continued areas for improvement.	July 1, 2021 – December 31, 2021	YALSA Membership.	These actions will lead to the culture shift needed to become a more inclusive association.	3800	Unknown	https://www.ala.org/ala/loae/2021/05/14/volunteer-ooortunitiv-6-month-commitment/
YALSA – Tammy Dillard-Steels	New Mission statement and strategic plan implementation	Equity, diversity and inclusion principles are fundamental to the values of the association and must be infused throughout the strategic work identified in this plan.	FY'22 – FY'25	YALSA Membership.	These actions will lead to the culture shift needed to become a more inclusive association.	3800	Unknown	New Mission Statement - Through networking, advocacy, and professional development, the Young Adult Library Services Association empowers all those involved in the profession to provide equitable, diverse and inclusive teen services.