TO: ALA Executive Board

RE: Conference Services

ACTION REQUESTED/INFORMATION/REPORT:
Discussion.

ACTION REQUESTED BY:
Earla Jones – Director, Conference Services

CONTACT PERSON:
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DRAFT OF MOTION:
N/A

DATE: 3/31/2020

BACKGROUND:
Midwinter 2020 Performance, Cancellation of Annual Conference 2020, Summer 2020 Virtual Event,
New January Event

ATTACHMENTS:
1. New January Event – Presentation/Recommendations

MIDWINTER 2020 PERFORMANCE

The 2020 Midwinter Meeting (Philadelphia) is currently showing a -23% revenue variance from 2019 and an 11% variance in expenses however, this is based on only a portion of each having posted to the performance report (ending January 2020). Registration revenue is expected to be $857,357 which is 80% or $206,643 less of the budgeted target. Advertising and Exhibition revenue was $1,023,961.50 slightly over the budget of $1,000,000.

There were moderate variances—both under and over budget – throughout, within normal ranges. Labor rates in Philadelphia area consistently create a struggle for groups and ALA is no exception. While diligent efforts were made to manage expenses, the reduction in registration revenue will result in a greater variance in budgeted net revenue.

CANCELLATION OF 2020 ANNUAL CONFERENCE

The following notifications been issued, initiated by the direction of our general counsel regarding the cancellation of the 2020 Annual Conference as a result of the COVID-19 pandemic:

- Insurance Underwriters
- Hotels
- Choose Chicago/McCormick Place
- ALA membership
- Registered Attendees
- Exhibitors
- Notification of Policies (Registered Attendees/Exhibitors)

SUMMER 2020 VIRTUAL EVENT

A Virtual Event is being planned to engage the ALA community over the dates of June 24-26, 2020. The event will not be designed to replace the programmatic, financial scale, impact of the in-person event. The purpose is to provide:

- education and networking for library staff, vendors, stakeholders
- an opportunity to come together in an unprecedented time
- an opportunity to keep the June "ALA conference time" front and center for our members and stakeholders
- an opportunity to showcase ALA's wealth of resources and content
- opportunity to experiment, innovate, and test new delivery platform, scheduling, and assessment processes that can be used going forward
- revenue; self-sustaining at minimum; profitability an ideal

The planning group met on 3/31/2020 and is working on assumptions and next steps to include but not limited to:

- Timeline
- Platform (technology; accessibility considerations)
- Schedule (capacity) and program (speaker availability)
- Keynote addresses (equivalent to opening and closing sessions and president's program)
- Vendor, sponsor and other stakeholder opportunities
- Potential of other "special event" activities that might be incorporated (poster sessions)
- Registration fees and budget
- Marketing
- Planning subgroups

NEW JANUARY EVENT

The following was presentation and recommendations was made to the Conference Committee and internal ALA stakeholders on March 13, 2020.

AMERICAN LIBRARY ASSOCIATION

New January Event

Recommendations for the ALA January event redesign.

Presentation 3/13/2020

Executive Summary

Over the past 2.5 years, ALA has been focused on changing the landscape of the Midwinter (January Event) Meeting. The motivation for this examination was the noticeable downward trends in member attendance and exhibitor participation and resulting declines in revenue generated by the event.

As part of this process, ALA engaged the University of Central Oklahoma to facilitate the strategy and design process. The goal of this engagement is to deliver a high-level strategic plan for guiding the direction of the new January Event.
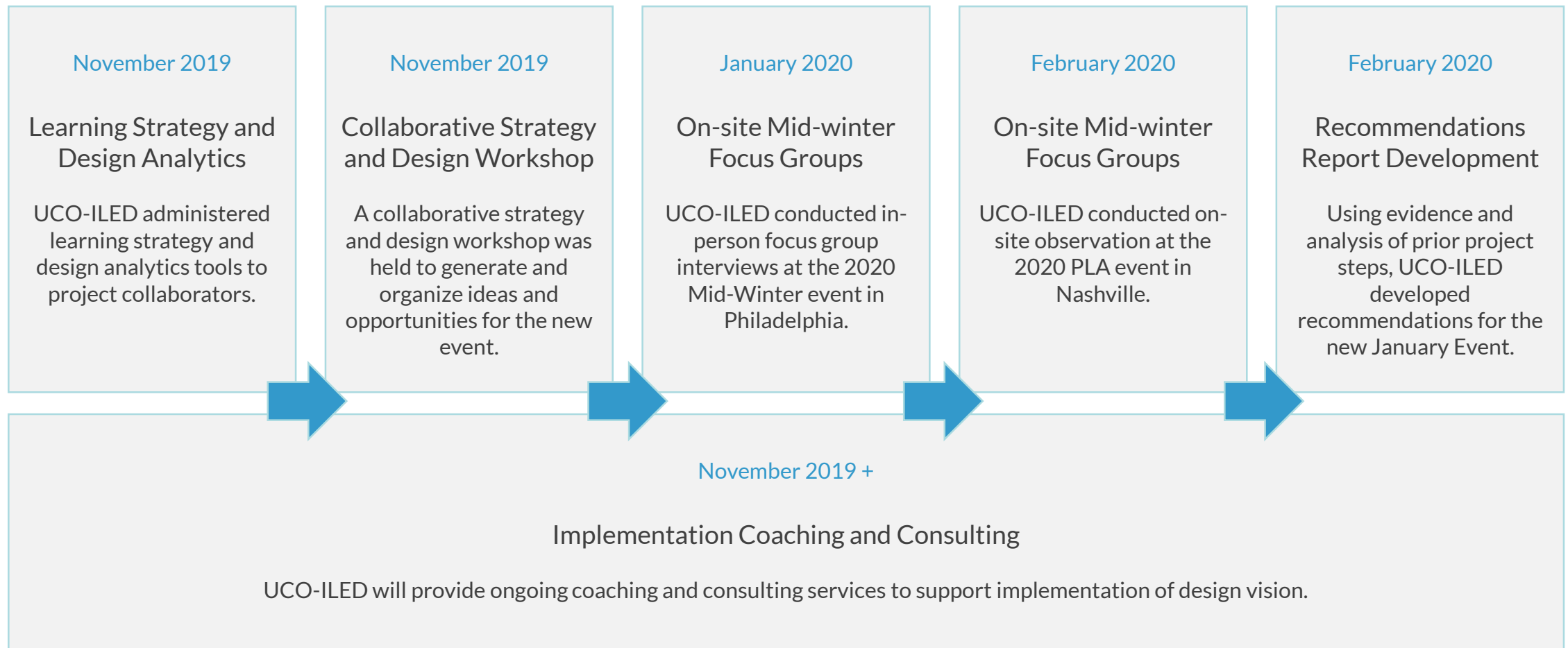
This report presents recommendations developed through in-person strategy workshops, focus group interviews with key stakeholders, and learning design processes. The findings and strategy recommendations contained in this report are intended to guide final decision-making and implementation processes.

This report is intentionally presented in focused segments to promote continued planning and implementation of each design consideration.

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Strategy and Design Method

The following diagram illustrates the strategy and design processes used by UCO-ILED to develop recommendations for the re-designed January Event.

November 2019
Learning Strategy and Design Analytics

UCO-ILED administered learning strategy and design analytics tools to project collaborators.

November 2019
Collaborative Strategy and Design Workshop

A collaborative strategy and design workshop was held to generate and organize ideas and opportunities for the new event.

January 2020
On-site Mid-winter Focus Groups

UCO-ILED conducted in-person focus group interviews at the 2020 Mid-Winter event in Philadelphia.

February 2020
On-site Mid-winter Focus Groups

UCO-ILED conducted on-site observation at the 2020 PLA event in Nashville.

February 2020
Recommendations Report Development

Using evidence and analysis of prior project steps, UCO-ILED developed recommendations for the new January Event.

November 2019 +

Implementation Coaching and Consulting

UCO-ILED will provide ongoing coaching and consulting services to support implementation of design vision.

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General Event Vision

The new January Event should emphasize active and applied learning, networking opportunities for library professionals, and celebrate the positive impact libraries have on society. The following profile outlines key recommended factors for the new January Event.

Name: LibLearnX – The Library Learning Experience

Logline: The premier library learning, networking, and collaboration experience. (Learn. Network. Collaborate.)

Hashtag: #LibLearnX

Length: ~3 Days

Target Audiences:
- Early-Career Library Professionals
- Mid-Career Library Professionals
- Library Vendor Community

Optimal Event Size: 3,000 – 5,000 attendees

Market Price Range: $300 - $400

Unique Value Proposition: ALA and specifically the new January Event has the unique ability to convene library professionals from across different library fields for useful, memorable, and meaningful learning, networking, and collaboration experiences.

Design Notes

The name, description, target audiences, optimal event size, market price range, and value proposition was developed from analyzing focus group responses as well as results from the in-person strategy and design workshop.

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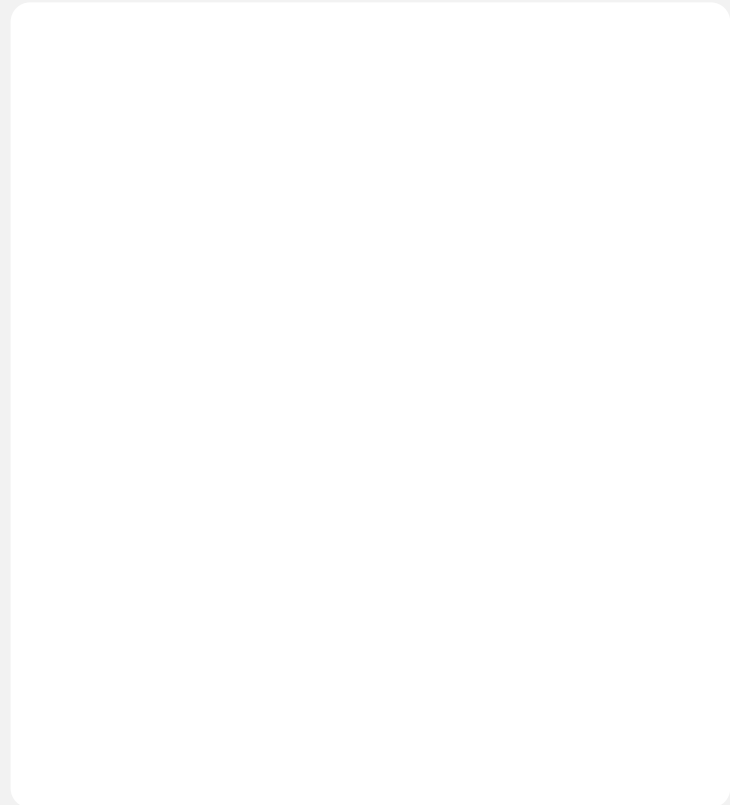
Target Audience Persona Summaries

While the library community is comprised of many different fields and areas of focus, the new January Event should specifically address the needs of the following key audience personas.

Early-Career Library Professionals
- What we heard from focus groups:
  - *Desire to understand how ALA "works"*
  - *Requires an approachable and easy-to-navigate event*
  - *Seeking opportunities and offerings to enhance career*

Mid-Career / ALA Member Library Professionals
- What we heard from focus groups:
  - *Want to apply what they learn to their job – immediately*
  - *Networking with other library professionals in their field is a major driver and benefit of ALA events*
  - *Many require a strong justification to travel or are self-funding travel to ALA events*

Library Vendor Community
- What we heard from focus groups:
  - *Primary goals in attending event are to general sales leads, engage with prospective and current customers, and promote new offerings*
  - *Committed to serving the needs of the ALA community*
  - *Main desire is for specific "no compete" time to engage with attendees*
  - *Desire to engage early and mid-career library professionals*

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General Engagement Strategies for Personas

Each target audience persona will require specialized learning and engagement strategies. The following information summarizes strategies for consideration.

Early-Career Library Professionals
- Provide "new-to-ALA" events and programing that allows attendees to learn more about ALA and the benefits it can offer early-career library professionals.
- Provide simple and easy-to-use conference materials and schedules.
- Encourage opportunities for early-career professionals to learn from and be coached from more senior library professionals.

Mid-Career / ALA Member Library Professionals
- Provide programming based on relevant and "job-ready" topics.
- Provide networking opportunities based on library focus areas.
- Provide a template justification letter and resources prospective attendees can use to gain approval to attend event.
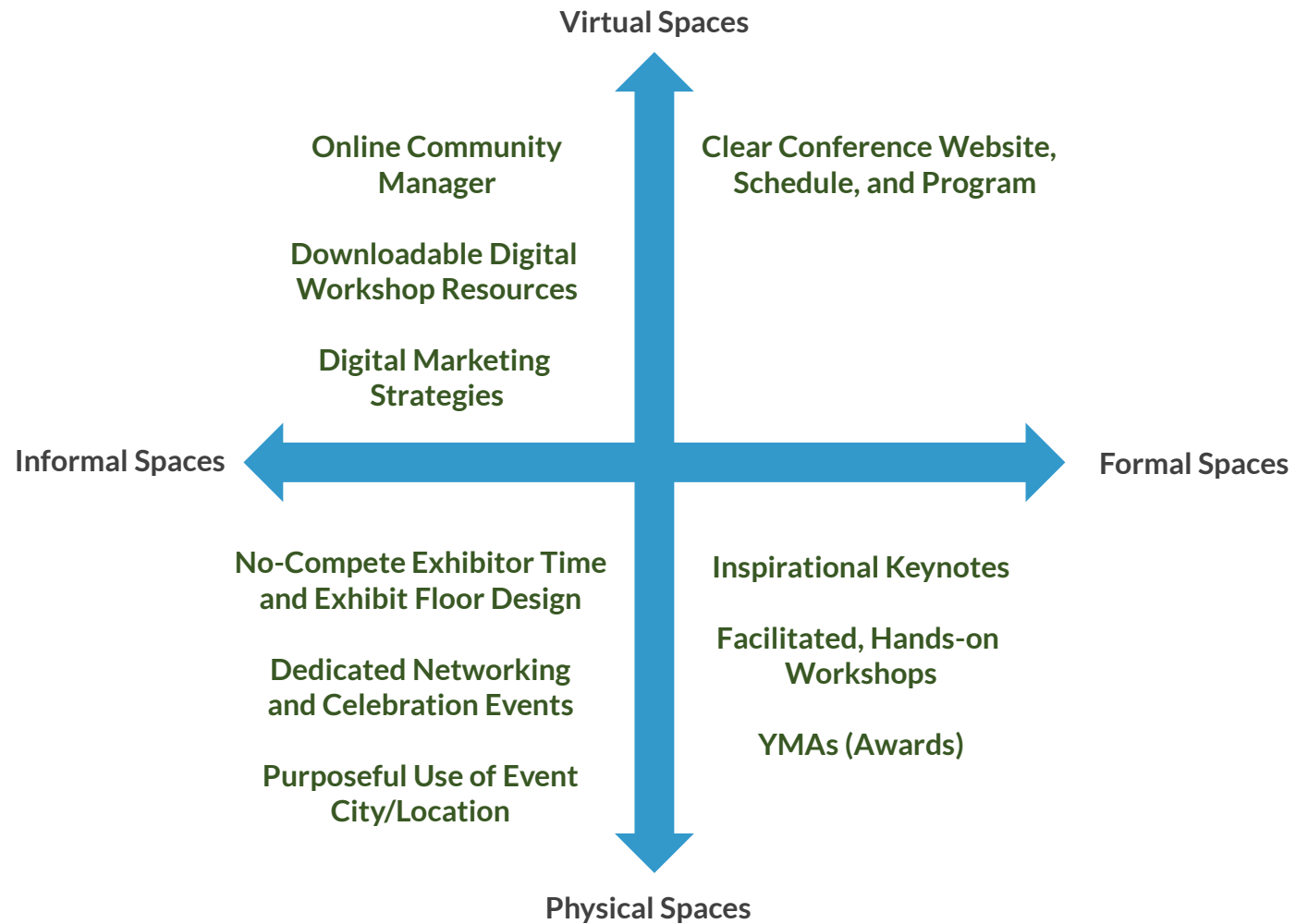
Library Vendor Community
- Offer no-compete time and incentives such as food to bring attendees to the exhibit floor.
- Provide opportunities for vendors to showcase their offerings along side library professionals on exhibit floor learning stages.
- Provide opportunities for vendors to sponsor networking and special events.

Design Notes

Refer to summary report of the Midwinter Persona Focus Group Interviews for additional details on personal characteristics and themes.

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Learning and Engagement Strategies

The following diagram illustrates key recommended engagement strategies for the new January Event.

Virtual Spaces

Online Community Manager

Clear Conference Website, Schedule, and Program

Downloadable Digital Workshop Resources

Digital Marketing Strategies

Informal Spaces

Formal Spaces

No-Compete Exhibitor Time and Exhibit Floor Design

Inspirational Keynotes

Facilitated, Hands-on Workshops

Dedicated Networking and Celebration Events

YMAs (Awards)

Purposeful Use of Event City/Location

Physical Spaces

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Inspirational Keynotes

The strategic use of keynote speakers will be a central factor for success of the new January Event. The following list highlights opportunities for optimizing the use of this learning strategy:

- Select keynote speakers who are generally inspirational and inspire action within the library professional community

- Align the topic of the keynote speakers to the theme of the event

- Consider the keynote programs as opportunities to intentionally advance the goals and themes of the event. Ensure the connection to libraries and future-oriented issues are incorporated.

- Incorporate special breakout session based on Keynote presentation topic.
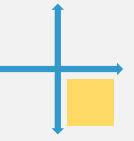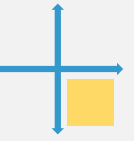
Design Notes

Focus group participants indicated a positive perception of the high-profile keynotes and the inspiration they create.

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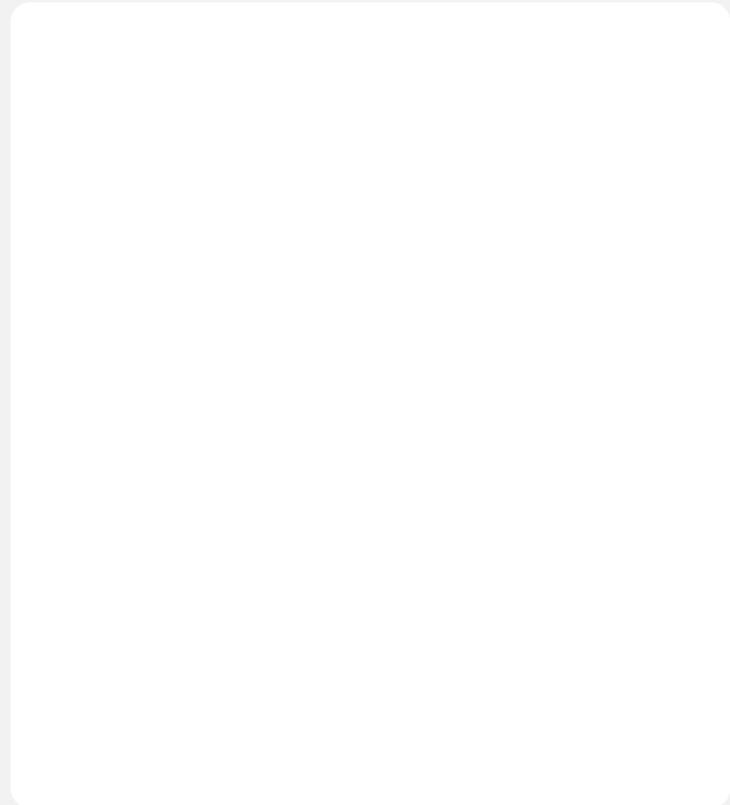
# Active and Applied Learning Workshops

Active and applied learning workshops should be considered an essential and integral part of the new January Event. Consider the following recommendations related to implementing this feature:

- The session incorporated in the new January Event should include a focus on hands-on learning and helping participants apply their skills to their job.

- Special attention should be given to selecting engaging and active facilitators that not only have compelling information to share, but also can engage an audience in effective and engaging ways.

- The session should allow time for practice, feedback, and reflection on how the content and skills can be used in applied situations.
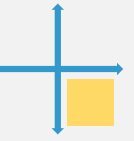
Design Notes

One of the most consistent focus group themes was a desire to use and apply what was learned right away. The degree that this was possible seemed to be directly related to the perceived value of the learning event.

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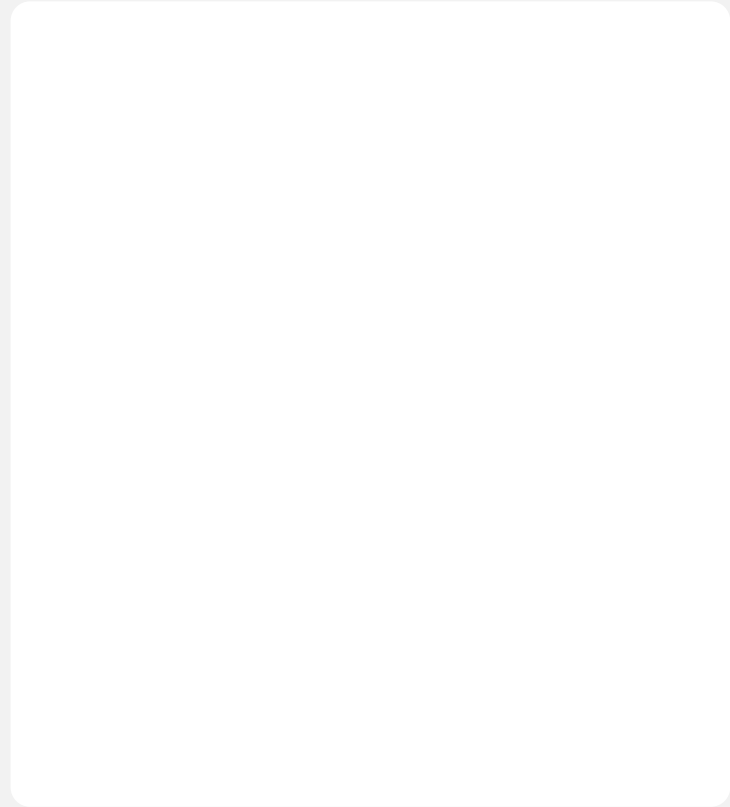
Award and Celebrations

The *Youth Media Awards* (YMAs) and the *I Love My Librarian* Awards represent truly unique and exciting opportunities for celebrating innovation and excellence. The following recommendations present opportunities for incorporating the YMAs and the I Love my Librarian Awards into the new January Event.

- Scheduling strategies should emphasize the importance of the awards and celebrations by not scheduling other events or meetings at the same time.

- Consider providing t-shirts or another type of promotional item that is branded for the award as people enter the awards space.

- Incorporate opportunities following the event for attendees to engage with publishers, authors, and other attendees. (e.g. coffee conversations about winners, etc.)

- Consider allowing local library professionals to attend this ceremony for free or a reduced price to engage a broader audience.
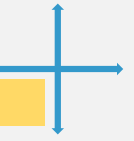
Design Notes

The YMAs and the I Love My Librarian Awards offers unique opportunities elevate the profile of the new January Event. The strategy workshop and focus groups seemed to reference the YMAs and other awards as points of pride for the ALA community.

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No Compete Exhibitor Time

The vendors/exhibitors play a vital role in the library and ALA community. The new January Event should reflect this importance by providing several "no compete" times in the schedule for attendees to engage with the exhibitor community. The following recommendations provide strategies for optimize the use of exhibitor "no compete" time.

- Ensure blocks of time are specified and communicated as for exhibitor engagement

- Encourage exhibitors to clearly communicate the "norms" for engaging with their booth. For example, an attendee should clearly know if a book is free to take or if it is for sale.

- Consider providing a description of the norms and procedures for engaging with vendors in the conference program. This should be shared with vendors ahead of time as well.

- Identify opportunities, within the guidelines of ALA, to share demographic data and information about prospective attendees with vendors ahead of the event. This will allow vendors to customize their offerings to engage attendees.

Design Notes

One of the major themes identified during the vendor focus group sessions was a desire to have no compete time with event attendees.

Observed PLA event included extended times identified for exhibitor interactions that did not complete with other content sessions.

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