Overview
Currently, the board receives updates on the accomplishments of appointed member groups in several ways:

- Monthly and Annual Reports from the President
- Committee Chair Quarterly Reports
- Informal feedback through conversations and email

Although YALSA has taken great strides to change how we do the work of the organization and creating more access to volunteer opportunities for members, we have not changed how and when we track the outputs of these volunteer groups or gain feedback from members. Current measurements do not allow the Board to:

- see if member work is ahead, on track or behind schedule
- easily spot trends
- identify rock star member leaders to celebrate their accomplishments or identify members struggling with committee work to provide support
- clearly measure accomplishments toward strategic plan goals and projects
- capture year end reports that would help the next committee chair
- track work that is accomplished in new micro-volunteering opportunities or outside the traditional year-long committee model
- gain feedback on effective chairs

Suggested Changes to Quarterly Chair Report Form
To understand how we can best leverage YALSA resources to achieve our organizational goals, Board members need to have a good grasp on our capacity and accomplishments. As one of our most valuable commodities, volunteer accomplishments and outputs is one of the least
understood. A new reporting method is key to providing the board with a holistic view of recent efforts and accomplishments as well as a tool to track trends over time.

**What you measure is what you value:** As we have adopted a new paradigm, mission and vision for YALSA we have not drastically changed what we measure in quarterly reports from chairs. It is time for us to consider what is important for us to measure and how often we need to measure it.

For a suggested new Quarterly Chair Report see Appendix B.

**Dashboards encourage critical thinking and board engagement:** Board Source recommends creating dashboards as a way of creating easily digestible data for board members to measure the health of the organization. Adding a dashboard to quarterly reports to the board will provide an at-a-glance tool for board members to:

- Track progress toward goals
- Maintain a governance perspective
- Spot potential problems
- Identify patterns and anomalies

For a view of what this might look like as a cover sheet to current Quarterly Chair Reports see Appendix C.

**Questions to Consider**

- What does YALSA value and what are we currently measuring from our Quarterly Chair Reports? Do those match up?
- Does the current schedule of Quarterly Chair Reports serve the boards needs to provide a holistic view of the organization while not overburdening staff?
- What measurements would best help the board assess our progress toward fulfilling the goals of the Organizational Plan?
- What data trends would it be helpful to see analyzed in a dashboard? How would the board act on those trends?

**End-of-Term Report**

An end-of-term report has been suggested by several member leaders and with new volunteer opportunities that do not fall into traditional committee timelines, the time is ripe to implement a new measurement tool to capture this information.

An End-of-Term Report could act as a close out tool for traditional committee terms as well as a tool to capture short-term and micro-volunteering outputs. A successful end-of-term report would:

- capture overall accomplishments
- receive feedback that can be passed on to another group (if work is recurring)
- identify YALSA rockstars that can be encouraged to become YALSA leaders in the future.
- Collect stories that can be used for volunteer recruitment
● Identify issues that might have been reported in a Quarterly Chair Report
To limit staff time spent gathering end-of-term reports, these could be compiled twice a year and reported to the board.
For a suggested End-of-Term Report see Appendix E.

Questions to Consider
● What metrics does YALSA need to track to accurately measure the outputs of micro and short-term volunteering opportunities?
● How often would the Board need to review end-of-term reports to gain an understanding of volunteer outputs while not overburdening staff?
● What measurements would best help the board assess our progress toward fulfilling the goals of the Organizational Plan?
● What data trends would it be helpful to see analyzed in a dashboard? How would the board act on those trends?

Reporting Schedule and Board Accountability
Reports are only useful if they supply the Board with the information they need to better understand the accomplishments of volunteer efforts and hold Board members accountable to act on the insights that provide.

The report schedule can be large and complex to see at a glance, another part of this process that might require an overhaul. For a suggested reporting schedule see Appendix F.

Please note this schedule may include inaccuracies and was taken from YALSA list of volunteer groups listed on the website in May 2018.

At each conference, a YALSA staff person should be tasked synthesizing insights with Chair Reports and End-of-Term reports submitted in the last 6 months and report to the board on trends. This will provide the board with a more holistic view of member outputs and the long-term perspective of a staff member will provide much needed context to identify patterns and anomalies.

Questions to Consider
● How can we best optimize the schedule for member leaders to provide feedback and updates and for the board to receive and digest that information?
● What tools are best used to track and measure these questions and answers and report them to the board?
● What processes or systems does the Board need to put in place to maintain accountability to insights found in chair and end-of-term reports.
Possible Board Action

The Board directs a standing committee or taskforce to refine suggested reports and schedules outlined in this document and return a recommendation to the Board no later than September 15, 2018.

Recommended Board Action

The Board directs the Executive Director to work with staff to implement the changes outlined in this document to go into effect no later than November 15, 2018.

Other Resources

Chair Quarterly Reporting Form
Annual Reports
Annual Reports, http://www.ala.org/yalsa/aboutyalsa/annualreports/annual_reports
Chair Quarterly Reporting Form, http://www.ala.org/yalsa/quarterlyreportingform
YALSA Board of Directors – Midwinter 2017 Topic: Measuring Volunteer Impact Item #44
The Importance of Measuring Volunteer Impact, https://trust.guidestar.org/blog/2015/06/01/the-importance-of-measuring-volunteerimpact/
Organizational Plan, http://www.ala.org/yalsa/aboutyalsa/strategicplan
Appendix A: Current Chair report
Appendix B: Suggested Quarterly Chair Report


Email __________________

Group __________________

Chair’s Name ________________

Board Liaison ________________

Committee/Jury/Taskforce Function Statement _______________________________________

Looking at your group’s tasklist is your group: (likert scale)

O-----------------------------------------------O- ------------------------------------------O

Ahead of Schedule On track Behind Schedule

What has your group achieved over the last 3 months? Specifically what from your tasklist have you accomplished?

Is there any work not on your tasklist that your group has accomplished?

How has the group shared its accomplishments over the past 3 months?

How does the committee work over this term align with YALSA’s implementation plan goals? (check all that apply)

Priority Area: Leading the Transformation of Teen Library Services

☐ Leverage YALSA programs, activities, and communications to promote the transformation of teen library services.

☐ Leverage relationships with state association to promote the transformation of teen library services.

☐ Implement ongoing curricula to build knowledge and skills required to bring about the transformation of teen library services.

☐ Institute a three-track leadership development curriculum for (1) front-line library staff, (2) managers, and (3) senior leadership for YALSA and the profession.

☐ Develop a program of training and assessment for cultural competency.

☐ Model diversity for the field through YALSA’s recruitment, membership, and governance.

Priority Area: Advocacy to Policy Makers at All Levels to Increase Support for Teen Library Services

☐ Train, empower, and support YALSA members to conduct advocacy at all levels.
☐ Conduct quarterly briefings on Capitol Hill for legislators, policymakers, and their staffs.

Priority Area: Funder and Partner Development
☐ Develop and implement an entrepreneurial funder and partner development strategy.
☐ Ensure members are capable of engaging current and potential funders and partners development at the local level.

What does your group plan to accomplish over the next three months?

Is your group facing a challenge or barrier? What can YALSA do to help?

Please list any participation concerns, including unexcused absences, and how you addressed them.

Additional Concerns or Comments:
Appendix C: Mock Chair Report

May 2018 Chair Reports
National Library Legislative Day Taskforce
E-Mail: jennifer.korn@cincinnatilibrary.org
Chair's Name: Jennifer Korn
Board Liaison: Kate McNair

Committee Jury or Task Force Function Statement:
To encourage all members to participate in NLLD by creating messages and resources and then working with YALSA’s Communication Specialist to leverage YALSA's communication channels; to provide members with tools and resources to help them educate elected officials about the need for strong library services for/with teens; and to vet the applications for the NLLD travel stipend and choose a winner(s).

Looking at your group’s tasklist is your group:

- Ahead of Schedule
- On Schedule
- Behind Schedule

What has your group achieved over the last 3 months? Specifically what from your tasklist have you accomplished?
Encouraged member participation in NLLD through blog posts, social media posts, and posts to state and regional listservs. Some updates were also made to the NLLD wiki.

Is there any work, not on your tasklist that your group has accomplished?
No.

How has the group shared their accomplishments over the past 3 months?
PR/Promotion (blog post, YALS article, e-news item, etc)
Resource Development (toolkit, wiki page, etc)

How does the committee work over this term align with YALSA’s implementation plan goals?
LTTS: Leverage relationships with state association to promote the transformation of teen library services.
Advocacy: Train, empower, and support YALSA members to conduct advocacy at all levels.

What does your group plan to accomplish over the next three months?
We will interview the NLLD stipend winner and publish the interview on the blog. We will encourage donations to FOY for next year’s NLLD stipend in support of FAC. We will encourage members to prepare for District Days. The task force’s term concludes on May 31.

Is your group facing a challenge or barrier? What can YALSA do to help?
No.
Please list any participation concerns, including unexcused absences, and how you addressed them.
The TF started strong in January, but lost steam part-way through due in large part to my being over-extended and not giving this TF the attention it deserved.

Additional Concerns or Comments:
None
Appendix D: End-of-Term Report

Timeline: due at end of service, compiled 2/1, 7/1

Email (optional) __________________

Member Name (optional) __________________

Group or Project __________________

Board Liaison __________________

How much time did you spending working with this group or project at a conference?

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None  0-5 hrs  6-10 hrs  11-15 hrs  16+ hrs

How much time did you spending working with this group or project virtually? (likert scale)

O-------------------O-----------------O------------ ----O

0-5 hrs  6-10 hrs  11-15 hrs  16+ hrs

What tools did you use to complete your work? (check all that apply)

☒ Zoom
☒ Email
☒ Slack
☒ Skype
☒ Google Hangouts
☒ Google Docs
☒ ALA Connect
☒ Other: __________________

Please tell us about an accomplishment you are proud of while working on this group or project.

Is there anything else about this opportunity that a prospective volunteer should know? Examples: expectations, required skills, competencies, etc.

Did you work with another YALSA volunteer who was a total rockstar? What makes them so awesome?

Any challenges you faced that YALSA should know about?
Would you suggest a change to the tasklist or charge of this group?

Appendix E: Proposed Report Schedule

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