

TO: ALA Executive Board

RE: ALA Conference Committee

ACTION REQUESTED: Discussion

DRAFT MOTION: NA

REQUESTED BY: Clara Bohrer, Chair, ALA Conference Services
Paul Graller, Manager, ALA Conference Services

DATE: January 16, 2019

BACKGROUND:

For the past two years, the ALA Conference Committee has been exploring future directions for the ALA Midwinter Meeting. Opinion on the Midwinter Meeting is sharply divided. Some members believe no mid-year event is necessary; other take just the opposite position. In between, the Conference Committee has heard a wide range of opinion on how a future mid-year event might be shaped, how it might be focused and what the various components of the event would be.

The attached documents, developed for discussion at this Midwinter Meeting, are based on a middle path and build on the successes of the current Midwinter Meeting. The proposed option recognizes and builds on the high visibility of the Youth Media Awards, the Carnegie Medal announcements, the RUSA Book and Media awards and related programming and exhibits at the current Midwinter Meeting. It also builds on and expands the current – successful – Symposium on the Future of Libraries, linking development of strategic leadership skills (know how) to the futurist content developed by and for Center for the Future of Libraries (know what). These two broad content streams will utilize multiple formats: information sessions (speakers and panels), interactive workshops for collaborative and hands-on learning, and “campfire” discussions, facilitated discussions designed to generate conversation among participants, across perspectives. Content is explicitly at the core of the envisioned event.

While meetings continue, they are reduced in number (only those where there is a defined need for high-value/high-cost face-to-face meeting) and separated in time (beginning/end) from the content sessions. This is intended to encourage interaction between leadership and other attendees around the critical discussions taking place in a changing field and to enable broader informal networking and conversation, enabling both leadership and other members and attendees opportunity to engage with each other.

While the Committee believes the event has the potential to attract a national audience, it is initially positioned as a slightly smaller meeting than the present Midwinter, assuming initial reliance on a regional audience. (For both Annual Conference and Midwinter, regional attendees may comprise 25% or more of attendance, depending on location.) The smaller footprint will enable ALA to take advantage

of smaller cities, which (in some cases) will itself reduce costs, and to control meeting/session-related costs such as AV. In building the sample budget, some dollars have, then, been shifted to support increased facilitation and to support networking events.

The following documents are attached:

- January 11, 2019 memo from Paul Graller to Clara Bohrer
- Sample Skeleton Schedule
- Sample Budget
- Draft Call for Proposals

There are several opportunities during the Seattle meeting to meet with members of the ALA Conference Committee and to comment on the proposal:

- ALA Conference Committee Meeting – Saturday, 10:30-12:30, WSCC Room 3B
- ALA Conference Committee Town Hall – Sunday, 10:30-11:30, SHER Cedar Room
- ALA Conference Committee Town Hall – Sunday, 4:00-5:00, SHER Cedar Room

Additionally, the ALA Conference Committee Chair will be reporting at Council III on both the impact of changes to the ALA Annual Conference (initially implemented at the 2018 Annual Conference in New Orleans) and the proposed replacement for the ALA Midwinter Meeting.

Implementation of the new event is proposed for January 2021 in Indianapolis (already contracted) and 2022 in San Antonio (already contracted). As with the Annual Conference changes, the ALA Conference Committee will evaluate following each iteration of an event, making changes as needed based on on-site and post-conference evaluation.

Date: January 11, 2019

To: ALA Conference Committee

From: Paul Graller, Conferences Services

Re: Model for Replacement of Midwinter

Where are we now

Over the past two years, ALA has conducted research into attitudes regarding the Midwinter 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. Numerous surveys, group discussions and face-to-face interviews were conducted among members and exhibitors. Overall, it was clear that the negative perceptions of Midwinter were starting to negatively impact member perceptions of the Association.

Statistics show the decline in member participation has led to a parallel decline in exhibitor participation. This has impacted overall (gross) revenue, overhead recovery by ALA, and, due to the production costs involved, led to net revenue losses.

The options investigated included:

- 1) Elimination of Midwinter. This option was rejected for various reasons:
 - Many members felt there was still need for a January education and networking opportunity.
 - The value of the Youth Media Awards and associated activities.
 - Exhibitors are interested in a venue to announce spring titles and introduce authors.
 - ALA needs the revenue and associated overhead contribution.
- 2) Keep Midwinter basically as it is with minor changes. This was also rejected. It is obvious through the research that the downward trend is not reversible with minor changes. Minor changes could also lead to the further dilution of a clear brand for the event – a clear concern for attendees and exhibitor participants.
- 3) Replace Midwinter with a new event that meets the needs of attendees and exhibitors. This will allow ALA to:
 - a. Present educational/professional development content that is curated and targeted to the needs of attendees while at the same time remaining distinct from division conferences, which is not permitted at Midwinter.
 - b. Develop an event that can be more easily marketed by staff and understood by the marketplace.
 - c. Bring an event to new cities and regions that may be underserved by ALA's larger face-to-face educational offerings. This may also result in lower hotel costs for attendees.
 - d. Motivate the staff and member leadership to create more meaningful opportunities for committee work outside of the traditional dependence on a Midwinter Meeting, while still accommodating high level governance activity for which face-to-face meeting time offers significant advantages.
 - e. Allow ALA to limit production expenses by conducting the entire event within the convention center, contracting less space than the current Midwinter footprint.

- f. Generate revenue and recover overhead to support other activities of the association.
- g. Eliminate the current conflict at Midwinter of overlapping meetings and education.

What are the next steps

The proposed new event will bring together two important conversations – *Books, Media, & Authors* and *Leadership, Strategy, & the Future* – to provide unique offerings and let attendees pick the best mix of continuing education and development for their career paths. The Books, Media, & Authors track focuses on the traditional core of libraries – books, literacy, multimedia collections, and more. A perfect complement to the Youth Media Awards, Andrew Carnegie Medals Announcements, and RUSA Book and Media Awards Ceremony and Reception, this track will feature educational sessions and workshops that explore the collection, promotion, and evaluation of books, media, and other resources for children, teens, and adults. The Leadership, Strategy, & the Future track focuses on both the topics (what to know) and the skills (how to know) that library professionals need to lead for the future. This track will feature educational sessions, workshops, and discussions that explore new and emerging trends, changing contexts and circumstances, innovation and ideation, problem-solving, and teamwork and collaboration.

For there to be an appropriate amount of time to develop the content and a marketing plan, a final decision on the format and schedule needs to be completed by June of 2019. The goal would be to announce the new event in the fall of 2019 and open the abstract submission process in September of 2019. The program would be finalized, and registration and housing would open in March of 2020 for the event to be held in January 2021.

All future Midwinter contracted sites beyond 2021 will be evaluated for their strengths and weaknesses in hosting this new event.

Although the change to a “new event” is ultimately an ALA business decision, input from the ALA Conference Committee, units of the Association and members is welcome. I will be at the ALA Conference Committee meeting on Saturday, January 26, 2018 to present and hear feedback on the attached skeleton schedule which illustrates what the “new event” will look like. I have also attached drafts of a call for proposals and budget for the “new event.”

Two town halls will be held during Midwinter 2019 to provide an opportunity for units/members to discuss and provide feedback on the model. I will be present at both town halls.

ALA Conference Committee Meeting—Saturday, January 26, 2018—10:30 am-12:30pm—Convention Center, Room 3B

ALA Conference Committee Sponsored Town Hall—Sunday, January 27, 2018—10:30-11:30 am—Sheraton, Cedar Room

ALA Conference Committee Sponsored Town Hall—Sunday, January 27, 2018—4:00-5:00 p.m—Sheraton, Cedar Room

ALA C4F

	AM--8:00	8:30-10:00am	10:30am-noon	noon - 1:00pm	1:30-3:00pm	3:30-4:30pm	5:00-- 6:00pm	7:00pm --
DAY 1 (Friday)		Meeting Period 1	Meeting Period 2	Lunch	Meeting Period 3	Meeting Period 4 Conference Orientation	EXHIBITS OPENING Reception	Open
	AM--8:00	8:30-9:30am	10:00-11:00am	11:30-12:30	1:00-2:00pm	2:30-4:00	4:00-5:00	6:00pm --
DAY 2 (Saturday)	[Sponsored Breakfast sessions]	Day 1 Opening Session - Leadership, Strategy, & the Future	Session 1	Lunch/ Lunch N' Learns	Session 2	Session 3	Exhibits Special Events / Reception	Open Carnegie Announcements
		Day 1 Opening Session - Books, Media, & Authors						
	AM--8:00	8:30-9:30am	10:00-11:00am	11:00am -- 12:30pm	1:00-2:0pm	2:30-4:00pm	5:00-6:00pm	6:00pm --
DAY 3 (Sunday)	[Sponsored Breakfast sessions]	Day 2 Opening Session - Leadership, Strategy, & the Future	Session 4	Lunch/ Lunch N' Learns	Session 5	Session 6	Exhibits Special Events / Reception	Open
		Day 2 Opening Session - Books, Media, & Authors						
	AM--7:45	8:00-9:30am	10:00-11:00am	11:00am -- 12:30pm	1:00-2:30pm	3:00-- 4:30 pm	5:00-6:00pm	6:00pm --
DAY 4 (Monday)	Dr. Martin Luther King Jr. Sunrise Observance (6:30-7:30am?)		Session 7	Lunch/ Lunch N' Learns	Closing Session/Speaker	Meeting Period 5	Meeting Period 6	Open
		Youth Media Awards						

NOTE: Sessions may be lecture, workshop (active) or discussion.

New Event Budget
11-6-18

REVENUE	Budget	
Exhibits		
Exhibit Space	\$ 700,000.00	35,000 @ \$20/nsf
Sponsorships	\$ 75,000.00	
Advertising	\$ 75,000.00	
Attendee		
Exhibit Hall Only Registration	\$ 20,000.00	
Conference Registration	\$ 787,500.00	3,500 @\$225
Miscellaneous Revenue		
Retained Cancellation	\$ 2,000.00	
Hotel Commissions	\$ 42,000.00	2,000 rooms@4 nights@\$150@3.5%
Meeting Room Rentals	\$ 15,000.00	
TOTAL REVENUE	\$ 1,716,500.00	
EXPENSES		
PRODUCTION		
Facility Rental	\$ 85,000.00	
General Contractor	\$ 150,000.00	
Photographer	\$ 10,000.00	
First Aid	\$ 5,000.00	
Electrical	\$ 15,000.00	
Telephones/Internet	\$ 15,000.00	
Computer Rental	\$ 40,000.00	
Show Cancellation Insurance	\$ 5,000.00	
Registration Contractor	\$ 25,000.00	
Registration Temporary Labor	\$ 10,000.00	
Registration Supplies	\$ 15,000.00	
Security	\$ 35,000.00	
Staff Travel	\$ 25,000.00	
Staff Housing	\$ 10,000.00	
CONFERENCE		
Keynote Speaker	\$ 30,000.00	
Speaker Fees	\$ 20,000.00	
Audio Visual	\$ 150,000.00	
F&B - Receptions in exhibits	\$ 100,000.00	
Accessibility Services	\$ 20,000.00	
Ground Transportation - Shuttle Bus/Limo	\$ 30,000.00	First year only
EXHIBIT SALES & DEVELOPMENT		
Prospectus/Sales Materials - Printing	\$ 3,500.00	
Postage	\$ 4,000.00	
ATTENDEE DEVELOPMENT		
Post Card #1 - Print	\$ 3,250.00	
Post Card #1 - Postage	\$ 5,000.00	
Ad Development	\$ 500.00	
Web Development	\$ 5,000.00	
Eblasts	\$ 500.00	
Post Show Surveys	\$ 500.00	
Directory Design and Printing	\$ 25,000.00	
Administration		
Salaries/Benefits	\$ 120,000.00	
Exhibits Contractor	\$ 85,000.00	10% of exhibit revenue
Council	\$ 100,000.00	
Bank Service Fees	\$ 20,000.00	
Expenses	\$ 1,167,250.00	
Net Revenue	\$ 549,250.00	68%
Overhead Contribution	\$ 446,290.00	26%
Total Expenses	\$ 1,613,540.00	94%
ADJUSTED NET REVENUE	\$ 102,960.00	
	6%	
Overhead plus profit	\$ 549,250.00	

Draft Call for Proposals

The 2021 January Meeting in Indianapolis provides new ways to connect and learn with colleagues from across the library profession.

Two content tracks – ***Books, Media, & Authors*** and ***Leadership, Strategy, & the Future*** – provide unique offerings and let you pick the best mix of continuing education and development for your career path.

Submit Your Idea for a Books, Media, & Authors Session

The Books, Media, & Authors track focuses on the traditional core of libraries – books, literacy, multimedia collections, and more. A perfect complement to the Youth Media Awards, Andrew Carnegie Medals Announcements, and RUSA Book and Media Awards Ceremony and Reception, this track is especially interested in educational sessions and workshops that explore the collection, promotion, and evaluation of books, media, and other resources for children, teens, and adults.

Available session formats include:

- Information Sessions – A traditional theater room set with a front of room podium and/or speakers' table. These sessions provides focused consideration of a specific topic or issue with available time for questions and answers from the audience.
- Workshops – An interactive room set with rounds or tables that encourages collaborative discussion or hands-on learning. These sessions provide time for instruction and allow attendees to engage in active learning through discussion, activities, or other constructive learning.
- Author Sessions – A presentation, interview, or panel engaging authors or publishing industry leaders.

Submit Your Idea for a Leadership, Strategy, & the Future Session

The Leadership, Strategy, & the Future track focuses on both the topics (what to know) and the skills (how to know) that library professionals need to lead for the future. This track is especially interested in educational sessions, workshops, and discussions that explore new and emerging trends, changing contexts and circumstances, innovation and ideation, problem-solving, and teamwork and collaboration.

Available session formats include:

- Information Sessions - A traditional theater room set with a front of room podium and/or speakers' table that provides focused consideration of a specific trend, topic, or issue with available time for questions and answers from the audience. These sessions are especially useful for focusing attendees' attention on what they need to know now to make sense of the future.
- Workshops – An interactive room set with rounds or tables that encourages collaborative discussion or hands-on learning. These sessions provide time for instruction but allow attendees to engage in active learning through discussion, activities, or other constructive learning. These sessions are especially useful for focusing attendees' attention on how they can be more strategic, effective in leadership, or proactive in using foresight tools or strategies.
- Discussions – A “campfire” room set with a facilitator in the middle with the audience in the round. These sessions are designed to spark conversation across participants – a lead discussant

or facilitator poses questions or prompts and encourages participants to share their perspectives and insights.

The 2021 **Leadership, Strategy, & the Future** track will include a special focus on the Future of Learning. Session proposals that consider the future of learning (elementary education, higher education, vocational and workplace readiness, certification, credentialing, etc.) will receive special consideration.