

**2013-2014 ALA CD#44_62814_inf
2014 ALA Annual Conference**

TO: ALA Council

RE: Information Report: The Future of Publishing: Strategic Directions for the ALA
Publishing Department: Goals

ACTION REQUESTED/INFORMATION/REPORT:

None: information only

ACTION REQUESTED BY:

ALA Publishing Committee

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DRAFT OF MOTION:

No action is requested

DATE: June 28, 2014

BACKGROUND:

The Publishing Committee, under the direction of Ernie DiMattia, Chair, initiated a review of the Publishing Department's strategic direction in response to changes in the publishing industry and library market. With assistance from the Publishing Committee, the staff of the Publishing Department developed the attached document which introduces the goals of the plan.

Attachments: The Future of Publishing: Strategic Directions for the ALA
Publishing Department

The Future of Publishing Strategic Directions for the ALA Publishing Department

The Publishing Department: ALA Editions, Neal-Schuman, ALA TechSource, ALA Graphics, RDA, Guide to Reference, Booklist, American Libraries

Preface The Chair of the Publishing Committee, Ernie DiMattia, introduced the goal of renewing the strategic plan for the Publishing Department at the Publishing Committee meeting at the Annual Conference 2013. Ernie convened a meeting in November 2013 to discuss the issues facing the publishing industry, the library profession, and the library market. The discussion included the participation of Barbara Stripling and Keith Michael Fiels.

Following the meeting, Publishing Department management convened two retreats to address the elements of a strategic plan, including an environmental scan, SWOT analysis, convergence on definitions (mission statements, vision statements, values statements, objectives, strategies, tactics), and the selection of a planning model. Management then submitted a draft of a strategic plan to the publishing committee for review and discussion at Midwinter 2014.

Further revisions ensued. Ernie and Don Chatham, Head of the Publishing Department, then shared the draft with the Executive Board during its spring meeting for their review and comment.

Publishing Department management then revised the plan as follows for review by the Publishing Committee at Annual 2014 with the objective of presenting a final document to Council as an information item.

Mission: Advance professional development and improve library services while contributing to the financial viability of the association

Vision: ALA Publishing will be the content source of choice for the library and information profession

Values: ALA Publishing is dedicated to

- Timely, relevant, practical content
- Customer driven products and service
- Diversity of viewpoints
- Editorial excellence
- Innovation
- Collaboration
- Financial stability

The Future of Publishing Strategic Directions for the ALA Publishing Department

Envisioned Future Traditionally, publishing has meant the selection, preparation and distribution of printed matter – books, newspapers, magazines, pamphlets, posters. Contemporary publishing now includes materials in digital formats as well as materials created or adapted for electronic distribution.

Since the advent of the Kindle, and the subsequent proliferation of other electronic reading devices, publishing has undergone transformations that are both evolving and disruptive.

The process and economics of print publications differ significantly from the process and economics of electronic publications. The difference includes physical aspects – printing, distribution – as well as intellectual, skill-level aspects – editing on line, digital proofs, layout and design. Likewise, the differences affect the nature of the publications in the delivery chain – distributors, outlets -- including bookstores and libraries.

Nevertheless, the basics of publishing -- selection, preparation and distribution – whether in print or digital – remains the same in that the process first applies to content. As Sumner Redstone intoned, content is king.

The envisioned future sees ALA Publishing continuing to apply its (rapidly evolving) skills to content that will be distributed in all available forms, continuing to distinguish itself by its unique insight into the selection of timely, in-demand content, escalating its technical skill level in adapting to the prevailing forms of dissemination, and expanding its ability to adopt relevant marketing skills quickly and effectively.

The proportional distribution in favor of digital access is growing but print options will retain a viable balance once the emergence of e-book alternatives has stabilized. On the trade side, for example the e-book has grown rapidly and has begun to plateau. The challenge on the professional side will be in modeling and modulating the transitions.

The higher education market will become more robust in online options for the opportunities that online access affords with regard to such emerging phenomena as multiple access points, time-limited access options – including rentals -- and patron driven access.

Magazines have not been hit as hard as newspapers. Mobile options are ascendant and advertising support or interest in print ads is only changing slowly.

Posters will likely continue to function best as print items and the issue there is more on the order of staying current with new media celebrities. What is likely to change is the level of interest in physical items – lanyards, cups, etc.

The Future of Publishing Strategic Directions for the ALA Publishing Department

Given the continuing changes in formats and information delivery options, the overall size of the consumer base will expand because of the newly established ease of access. The number of consumers of content will grow because of the electronic options. The challenge for publishing is to capture the attention of those “new” readers and so grow the potential financial base.

Due to advancements in the functionalities available for e-books – such as those potentially provided by Epub3-- e-book options both for professional development titles and for textbooks will expand the potential for increasing the customer base.

Potential for growth in MLS programs also resides in the enrichment capabilities provided by online options – linking out to related content, cultivating and leveraging the relationships between textbooks, e-books and online access, and incorporating course management and workflow enhancements.

The future of ALA’s online magazine alternatives rests on such things as the potential to transfer a linear intermittent experience (turning pages) into a digital intermittent experience conditioned by social media behavior patterns (clicking on a visual display of stories).

Prospects for digital growth also include the ability to integrate options unique to a digital and online experience – for example, embedding video and audio. The potential to incorporate the reader community into the reviewing process now delivered by may offer additional advantages for expanding reach.

The markets have changed, the technologies have changed, and the distribution/access formats have changed but what hasn’t changed is the identification and presentation of relevant content, which remain the core competencies of successful publishing operations.

The envisioned future of the publishing department is a future that anticipates professional needs, responds to its member and professional base, and advances the mission and financial viability of the American Library Association.

The Future of Publishing Strategic Directions for the ALA Publishing Department

SWOT Analysis

Strengths

- The value of ALA’s authority and reputation
- Potential for collaboration with divisions and offices
- Ready access to ALA information – member lists, rosters
- Stature and authority of experienced staff in collection development
- Ability to attract celebrities because of mission and role
- Ability to mobilize national programs (than can be monetized)
- ALA’s “community” of high profile influence leaders
- Discount advantages because of Not-for-Profit status and presence in the “market”
- Heightened position in higher education by way of Neal-Schuman acquisition
- ALA’s ability and willingness to fund new ventures
- The “READ” posters brand
- Partnerships with content sources – publishers, studios
- Inexpensive exposure at ALA trade shows
- Variety or range of publishing platforms
- Early experience with e-book production and marketing
- Success in managing transition from print advertising to digital advertising

Weaknesses

- Department staff now smaller than before the Neal-Schuman acquisition
– affects staffing levels and expertise in all imprints not just books
- Behind in developing a mobile strategy
- Digital publishing platforms not in place
- Limited experience with marketing protocols of social media
- Metrics for social media
- The perceived “cost” of the subscription equivalent & its effect on growth
- Low frequency of the member magazine (6 issues)
- Limited connection to news sources – leads, tips from PR staff at libraries, vendors
- Single year, fund accounting budget expectations make long-term planning and investment difficult\

The Future of Publishing Strategic Directions for the ALA Publishing Department

- Financial expectations (General Overhead & Net Revenue) deter investment, research (infrastructure, systems, etc)
- Staffing for online/digital expertise
- Online store is no longer adequate, competitive
- Order Processing/Fulfillment vendor is failing
- ALA Tech support understandably aligned with association's not-for-profit priorities (i.e., not commercial priorities)
- Length of editing and production cycle for books

Opportunities

- Print on Demand
- Digitize Neal-Schuman content
- Partnerships with divisions that benefit both the Division Fund and General Fund
- More 3rd party relationships – as in Booklist's Corner Shelf partnership with Baker & Taylor's Title Source 3
- Monetize investments – e.g., Readers Advisory
- Growing potential for digital formats and digital access in MLS education and online learning
- ALA's international focus -- adds critical mass to development of emerging markets
- Emerging digital formats enable the delivery of publishing content to markets and customers that have migrated away from print for access to information
- Improved metrics – create stronger selling propositions for advertisers
- More original content on the American Libraries website (to increase traffic and advertiser interest)
- Integration of audio and video (especially video) into online content
- Upgrade publishing systems for both serials and monographs
- Anything that can go mobile should go mobile

The Future of Publishing

Strategic Directions for the ALA Publishing Department

Threats

- Fewer advertising dollars and greater competition among fewer players
- Publishers Weekly muscling into library advertising markets as book publishers seek other marketing avenues
- Reduced budgets for “nonessential” purchases (such as posters and other promotional products)
- Overall decline in ALA programs – Teen Read Week, National Library Week, etc.
- Reduced budgets for professional development
- Open Access
- Growing preference for online materials in higher education
- An embryonic digital/online market that is prone to disruptive technologies
- The pace or rate of transition from print to electronic across all publishing venues – i.e., magazines, advertising, books
- Identifying sustainable products in a changing environment
- The place of professional reviews

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Strategic Direction

Goals

1. The Department is prioritized around the web as the access and transaction medium of choice
2. A mobile strategy is integrated into content development plans
3. Staff resources are focused on product line initiatives that leverage the ALA brand
4. Time to Market standards meet market demands
5. ALA Publishing sets the standard for analog and digital education experiences
6. ALA Publishing becomes a leading source of English language content for international venues
7. Financial Stability