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## BOARD DOCUMENT

**TO:** Board of Directors  
**FROM:** Conference Modeling Workgroup  
**DATE:** 22 September 2006  
**RE:** Conference Planning Process Recommendation

**Recommendation:** The Conference Modeling Workgroup recommends that the Board of Directors approve the Conference Model described in this document and instruct the CEO to develop a conference plan based on the model. We further recommend that this model be implemented in 2008 for the Seattle, Washington conference and be followed for three years in order to provide sufficient time to review and evaluate the effect of the changes.

**Background Information:** In April 2006 the AOOO requested that the Finance Committee investigate financial investments in the SLA Annual Conference. This request came to AOOO from the Divisions who were seeking innovative ways to pay for programs. After discussions, the Finance Committee felt that there was a much broader issue involved and that a more comprehensive review should be made of conference program planning activities and, further, that this review should involve a larger group than the Finance Committee. The Finance Committee recommended in document A06-54 the formation of a workgroup "to study the overarching issues of annual conference planning." A workgroup consisting of SLA staff, the Finance Committee, the chairs of the Baltimore, Denver and Seattle Conference Planning committees, and the division chair and chair-elect was commissioned.

The group started working immediately after the June Annual Conference. Knowing that previous efforts to restructure the annual conference had failed due to lack of communication and buy-in from the membership, the workgroup conducted a member survey. In addition, as the group felt a mechanism to get more in-depth feedback from the membership was needed, it solicited volunteers to be interviewed by members of the workgroup. This solicitation went out on the Leadership list and in SLA Connections. Simultaneously, the Association was receiving feedback from the conference attendees' survey, the exhibitors' survey, and the membership survey.

Following is a broad outline of the action items the Conference Modeling Workgroup recommends for staff to implement beginning with the Seattle conference planners in January 2006.

**Length of Conference:** Overall members are happy with the time of year and days of the conference. However, there is concern about the overall length of the conference.

**Action Item:** The conference officially opens with a keynote address on Sunday evening and officially ends with a keynote address and conference wide event on Wednesday afternoon.

**Keynotes:** Several aspects of the keynote speakers were examined including the attraction, subject area, placement during the conference, and the number of speakers. There was some sentiment that the keynote speaker is not a main reason for conference attendance, but we all

know that a well-known personality in any field will fill the hall. Surveys suggested that a mix between entertainment type and information speakers was desirable. There was a large segment in favor of two speakers.

**Action Item: There are two keynote speakers. On very special occasions, and depending on the individual conference, there may be a third keynote speaker.**

**Leadership Training:** With the change in the Association year there must be a change in leadership training at both the Leadership Summit in January and at the Leadership Development Institute (LDI) during the Annual conference. Beginning in January 2008, the majority of Division and Chapter officer training will take place at the Leadership Summit. This complete restructure may not be fully accomplished by 2008, but we believe it is essential that the Association move in this direction to make the January Leadership Summit the primary vehicle for training all unit leaders in their new positions. The format of the Leadership Summit is currently a 2-day program with general leadership training one day and SLA training the second. This should remain unchanged. All unit leaders, not only Presidents and President-elects, should be highly encouraged to attend this program. Programs should be developed for the secretaries, treasurers, and committee chairs such as bulletin editors, membership, and strategic planning chairs, as well as webmasters.

The change in Association year presents an opportunity for a different kind of leadership program during the annual conference, one focused on overall leadership, not necessarily unit leadership. Its purpose would be to develop not only the Association's future leaders but also the profession's future leaders.

**Action Item: The chapter and division chairs and chair-elects, in consultation with the Professional Development committee, propose a new name for the Leadership Development Institute to reflect the changed focus.** The January program would concentrate on unit leaders, at all levels, with pertinent topics and face-to-face interactive/networking programs involving innovative teaching techniques. The June Leadership meeting will present a broader, more compact (i.e. 90- minute) program with a key leadership address and minimal hands on training of individual officers. Programs could be concurrent thus addressing the possible continuing need for training for officers other than the President and President-elect who are unable to attend the Leadership Summit.

Training is always needed and attendance at LDI needs to be re-invigorated. It should be the place where all leaders get in the know, learn something, and leave with new contacts.

**Action Item: In order to impact a larger constituency of SLA members, online leadership training should be developed and more training opportunities should be made available through Click-U (using new technologies such as WebEx).** This format may have special appeal to our technology savvy members and to those who cannot attend conference.

**Pre-conference Activities/Board, Divisions, Chapters, Caucuses, and CE:** Pre-conference activities would consist of activities and events outside of conference programming. This includes Board of Director meetings, all unit activities, including division board meetings, division CE courses, and city tours/events.

**Action Item: All meetings, CE's, and city tours/events, not related to programming or social networking take place on Saturday and Sunday prior to the official opening of the conference and that the following suggestions be followed:**

**Board Meetings:**

**Action Item: The Board of Directors meet all day on Saturday.** The Board traditionally meets for a full day on Friday and a half day on Saturday, then again at the end of the conference. This was necessary because a new Board was seated during the Annual meeting. With the change in Association year, business not completed on Saturday could be continued at a Wednesday or Thursday Board meeting. Or conversely if all business was completed on Saturday, an additional meeting following the conference might not be necessary. Under the current scenario those members who would like to attend are forced to add an additional day to

their travels in order to participate with the Board. We encourage the Board to structure their meeting to make optimum use of Saturday thus reducing one additional day of participant attendance. The Board can exercise its discretion to schedule more meeting time, either before or after the conference. This change could also encourage the Board to look at how they conduct business in January where there may now be more unit leaders in attendance.

**Divisions:** Business meetings are probably the most high-profile events for divisions and are considered “must-haves” by most of them. We say “most” because the SLA Bylaws do not require an in-person business meeting by the divisions, and the governance year no longer dovetails with the annual conference. Thus division planners have much more flexibility going forward, probably more than they realize.

Most divisions will likely want to continue to meet in-person at the annual conference, but since the Association year has changed, the meetings are no longer locked into a specific framework.

**Action Item: In order to reduce conflicts with other conference events, divisions are encouraged to schedule their meetings creatively and in the pre-conference phase.**

Following are planning suggestions:

- Schedule a meeting on Sunday. A late-morning brunch is feasible if LDI does not run on Sunday morning. (The Solo Librarians Division is testing this in Denver.) However, Sunday is relatively conflict-free and a meeting could be scheduled in the afternoon. Many people like to attend the exhibit opening at noon, so we encourage planners to schedule around the opening, but an hour-long meeting sometime in the afternoon would not seriously impede exhibit-going. They would have to avoid the Networking Reception no-conflict slot.
- Combine a business meeting with an open house. (Start with the business meeting, then adjourn to a social activity. This will not work for joint-division open houses, or in small hotel suites. It will work for single divisions who book meeting room space.)
- Spread out these meetings through the conference so people needing to attend multiple meetings can do it (including Board liaisons). In other words, don't clump all business meetings into one lunch slot.
- Don't schedule an in-person business meeting at all, just make do with social events (where Chairs can say a few words and thank volunteers and sponsors). Schedule a virtual business session at another time in the year. More members can participate that way.
- Use the opportunity, provided by the change in association year, to make the January Leadership Summit a more meaningful meeting for your division.

Other suggestions for division meetings:

- Assign “meeters and greeters” at open houses. These are designated division members who welcome people at the door. Also encourage activities that would make the open house less “clique-ish,” and would encourage more networking.
- Don't schedule a speaker for a business meeting; it's not a programming session. Conduct your business then let people go.

### **Chapters:**

**Action Item: Discourage formal meetings of single chapters at the conference.** If chapters feel the need, they can informally get together at a restaurant or bar. Many chapters arrange this informally, especially the smaller ones.

We do, however, see some value to having formal open houses for joint chapters. These are opportunities for “regional” groups to meet in-person, which can be difficult at home. It gives them the chance to meet each other and discuss joint activities. Examples of this are the Canada reception and the West Coast reception.

**Caucuses:** Caucus meetings (excluding joint programming sessions with Divisions) are usually informal. While they often get a meeting room, they also have offsite sessions (such as the famous Baseball caucus outings to ballparks.)

**Action Item: Caucuses should be encouraged to schedule meetings only for unbusy niches in the schedule, or after the working day.** Social events are often a better 'bonding' tool for caucuses that sometimes struggle to get attention and maintain members.

**First Timers:** The First Timers event is crucial to the Association. In many cases this is a member's first introduction to the Association. It draws several hundred people and for this reason it has not necessarily been a successful vehicle for networking or for understanding the conference.

**Action Item: The conference planning committee avoid conflicts in programming. Further we encourage the Fellows to re-examine the First Timers' event and develop a novel program utilizing interactive techniques to re-invigorate this very important program for the Association's future leaders.**

**Conference Programming:** Perhaps the largest area of concern and discussion involves conference programming. There appears to be general agreement on the following:

- Division co-sponsorship should be encouraged
- Diversity of programming is good
- Conflicting timing of programs is an issue
- Some sessions need to be repeated
- Vendors are extremely important to the conference and the Association
- Meal events included in the cost of registration should be offered when feasible
- A variety of presentation techniques should be used. There is too much PowerPoint and talking heads. (A compilation of suggested presentation techniques is contained in Appendix A).

The Divisions should be encouraged to be innovative in their programming. Tracks have been used in the past to both good and bad effect but there seems to be a thought that tracks can be useful.

**Action Item: The conference committee explore tracks that would follow the theme and enhance the attendees' ability to navigate the conference program.**

The conference committee should consider innovative uses of tracks, i.e. using tracks for one day of the conference, or perhaps for half days. We would also encourage better use of the theme in marketing, possibly throughout the year prior to the conference.

One of the consistent themes in all responses from members regarding SLA conference programming is the complaint that there are too many programs competing with one another in just about every time slot. Further, members say there is too much duplication of topics between and among divisions' programming, and very little cooperation in the development of programming. The workgroup's conclusion is that members would prefer to see less competition in time slots and more multi-division programming that commits more resources to make joint programming highly successful.

A limit on the quantity of division-sponsored sessions would institute a reliable maximum on total sessions that could be held at an SLA annual conference. This, in turn, would allow staff to accurately contract for space in the future. Due to the uncertainty of division planning at the time space is acquired, SLA has experienced the pain of inadequate space on more than one occasion. One of the top complaints expressed by conference participants is the level of acceptable planning for space. Setting a cap on division-sponsored sessions will allow SLA to avoid contracting for inadequate or too much space and, therefore, positively affect the Association's financial picture.

**Action Item: Divisions be limited to 4-6 unique Division-sponsored programs, with one being the business meeting (unless the business meeting is scheduled pre-conference) and 2-4 co-sponsored sessions. Divisions with sections would be allowed an additional program per section.** In this way divisions can get their name on programs that appeal to the division and co-sponsor programs that have a wider cross conference appeal.

**Action Item: The conference planning committee take a larger role in working with the divisions to recognize similar programs and co-sponsorship opportunities. The conference planning committee would also recommend which programs might be good to repeat during the conference.**

We recognize that there may be incentives necessary to accomplish these suggestions. **Action Item: Initiate a series entitled, "Spotlight Speakers."** The conference planning committee in reviewing the program plans with the divisions would identify one to two programs each day that would be highlighted in the conference program as "Spotlight" speakers/programs. The criteria for selection would be a program with more conference-wide appeal, not one that is specifically division-oriented. It would not necessarily be a keynote level speaker, but a program that could reasonably expect to draw a minimum of 250-300 people. We would seek innovative programs with a varied format, not only single speakers, but a combination of speakers, panels, demonstrations, etc. that have wide appeal. The programs would still be division-sponsored, but they would be marketed differently and "spotlighted" in the conference program. There would be no additional costs involved but there could be a public relations aspect to be exploited. This type of program should also encourage co-sponsorship.

**Action Item: Vary the length of programs between 60, 90, and 120 minutes.** This may involve additional staff time for logistics but could provide more diversity, encourage agile thinking, and more adequately allow for varying formats.

Because we begin programming eighteen months prior to the annual conference, we are sometimes locked into topics that may not be as relevant at the time of the conference and conversely we may miss a hot new topic. This eighteen month time frame is not dynamic and does not allow agility.

**Action item: Hold blank time slots for up to six months prior to the conference to address new technologies and subjects.** This would make the January planning meeting even more important.

**Action Item: The Association engage a "learning coordinator" on a contract basis/full time staff member.** This person would help the divisions in conference planning. In addition the learning coordinator would supplement program planning by looking for gaps in programming and identifying programs and speakers to fill the gaps. (This could be accomplished by an Association staff member or contractor.) We leave that to the staff to identify the best way to accomplish this task.

**Action Item: Encourage division planners to consider subject specific tours both following the conference and during the conference if the venue permits.** The divisions can work with the Association staff on logistics and to arrange to have these billed with conference registration.

### Continuing Education (CE)

**Action Item: The Professional Development (PD) Committee Chair make a presentation to the conference planners about themes, logistics, and SLA courses.** PD should maintain an ongoing close relationship with the Division CE planners throughout the process of CE course development to the point at which they are submitted to PD.

PD should liaise regularly with the Division CE Planners as their courses are approved for Conference. **Action Item: Each member of the PD Committee is assigned a group of Divisions to work with throughout the process consisting of regular e-mail contact and conference calls about the progress and marketing of each course.** This closer relationship with the Divisions will help PD develop an overall strategy for CE at Conference that would seek out new areas for development, provide guidance and direction for developing courses that are the latest "hot topics" and develop ideas for Click U. The PD Committee should also work with Divisions that offer no CE to help them identify and plan appropriate CE courses.

If CE is to be a vital part of Conference, it needs to be well planned and marketed.

**Action Item: Marketing and publicity for CE be revisited.**

Similarly, there is no focus on CE from the overall Conference Planning Committee. **Action Item: One member of the Conference Planning Committee be assigned special responsibility for working on CE's with the Divisions and SLA HQ as well as the PD Committee.**

**Action Item: There be a liaison between the Divisions and Click U to deliver more widely the more successful CE courses offered by the Divisions.** We suggest that a specific contact be named to work with the Divisions.

**Conclusions:** The Conference Modeling Workgroup recognizes that the SLA staff is continually working on improvements to the Annual Conference. We know that they are specifically looking at the awards presentation, exhibitor needs, no-conflict time, open houses, receptions, and vendor events, just to name a few. Therefore, we did not comment on all of these areas. Since members of staff have been part of this workgroup they have access to all of the feedback gathered by the survey and interviews. Much of this feedback is on logistics such as room scheduling and audio visual use and costs. We trust they will use this information as they continue to refine the conference process.

The time to act is now! We are rapidly approaching our 100<sup>th</sup> anniversary. In fact, the 2008 conference is the lead in to our centennial year. We need to take advantage of this opportunity to build on our heritage while enthusiastically and innovatively entering our second century.

**Financial Impact:** We are unable to determine long-range impact at this time. There will be costs associated with hiring a learning coordinator or additional staff, but there should be time in this process for this expense to be considered by the Finance Committee and Board of Directors. We sincerely believe that these recommendations will improve the conference experience and, in turn, should increase revenue to the Association.

I would like to thank the members of the Association who participated in the survey and in the interviews. Most importantly, I would like to thank the members of the workgroup who even though they have private lives, and work lives, found the time to work diligently the past three months to review the conference and develop this proposal.

Respectfully submitted by the Conference Modeling Workgroup,

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## Appendix A

### Suggested Types of Programming for Annual Conference *As identified by SLA survey respondents - 2006*

#### General

1. More sessions that appeal to everyone, across divisions
2. Unexpected topics
3. Programs you can tell your bosses about
4. "I've never heard this before" sessions

#### Subject Oriented

5. Cutting edge technology from real experts and how to incorporate them into your daily world
6. "How to" sessions; practical applications
7. Best practices; what have people done that is new and different
8. "Breakthroughs in \_\_\_\_\_"
9. "What's new in \_\_\_\_\_," presented by a noted professor in the subject area and an information professional.
10. Hot topics of the day; trends, state-of-the-art sessions
11. Programs on copyright; fee structures
12. Programs on the impact of the Association on what we do, what is the value added?
13. Policy-oriented programs
14. How world events impact what we do.
15. Scientists come to talk about research and how they use information and the type of data they use.
16. Resources for a specific subject area
17. Systems thinking, process improvement
18. Fun sessions like "The Science of Chocolate" and "Stress Management: Laugh for the Health of it."
19. International speakers
20. Division "keynote" sessions such as B&F's session on business intelligence in a changing world with Daniel Franklin, Editorial Director of the Economist Intelligence Unit.
21. Sessions on future directions of the profession
22. Virtual environments – someone from Second City or the gaming world

#### Management/Job Skills/Career Planning

23. How to make oral presentations
24. More management techniques such as staff counseling; change management
25. Content on skills; project management
26. More people programming such as career planning at different stages of career; retirement courses; stress for solo librarians; how to fit into company dynamics/read corporate culture
27. How to keep up with professional developments
28. Problem solving; sharing experience

#### Comments Related to Format

1. Utilize a wide variety of formats – PowerPoint presentation by one or two speakers; panel discussion with moderator; facilitated interactive discussions; PowerPoint with significant time allotted for questions/discussion; story teller (no PowerPoint); roundtables; poster sessions
2. More interaction and discussion needed.
3. What about a debate or point-counterpoint?
4. If there is a panel, do not have more than 3 speakers and allow sufficient time for Q&A.

### **Suggested Speakers**

1. Speaker from the Aspen Institute
2. John Battelle, journalist covering Search
3. Jonathan Schwartz, expert on blogging
4. Famous professor at a leading library or "I" school
5. Speaker who is inspirational and accomplished – what advice would they give us based on their experience

### **Miscellaneous**

1. Programming for newcomers, middle management, and senior management level information professionals – identify in program guide.